



# The Giving Common

An Initiative of the Boston Foundation

[www.thegivingcommon.org](http://www.thegivingcommon.org)

## Jewish Family Service of Metrowest, Inc.



Current

### General Information

475 Franklin Street, Suite 101  
Framingham, MA 01702 6265  
(508) 875-3100

**Website**

<http://www.jfsmw.org>

**Organization Contact**

Marc Jacobs [mjacobs@jfsmw.org](mailto:mjacobs@jfsmw.org)

**Year of Incorporation**

1979

# Statements & Search Criteria

## **Mission Statement**

### MISSION:

Jewish Family Service of Metrowest (JFS) provides vital social, health and community services to alleviate suffering, enhance lives and support people in need.

### Values:

Guided by the Jewish tradition of social responsibility and compassion, we are dedicated to:

- Supporting people of all ages and backgrounds
- Treating people with dignity and compassion
- Helping people achieve and sustain healthy lives and independence
- Providing culturally relevant services
- Collaborating with community partners to broaden our impacts

Please see the Annual Report for snapshots.

Please see Annual Report

[http://jfsmw.org/PDF/JFS\\_ANNUALREPORT2016-FINAL-2016.pdf](http://jfsmw.org/PDF/JFS_ANNUALREPORT2016-FINAL-2016.pdf)

## **Background Statement**

JFS was founded in 1979. It is a nimble and entrepreneurial organization, constantly incubating new models for meeting the needs of clients and the community.

Services and expertise center on:

- \* Keeping elders safe and healthy
- \* Strengthening children and families
- \* Making ends meet for those needing assistance
- \* Standing up for those left behind in society
- \* Building community

Commitments to frail elders/family caregivers and vulnerable children propel an intensified focus on our community delivered services and organizational collaborations. It has also placed the agency in the midst of significant issues of poverty and hunger that affect families with children and elders, in the Metrowest and Greater Boston community. We have re-allocated staff resources to ensure the continuation of essential activities. Community funding support has enabled a significant increase in JFS' capacity to be the front-line agency for the Jewish and general community; and several foundations have added resources for our community poverty, basic needs and food security responses.

There are powerful partnerships at Jewish Family Service of Metrowest among professional staff and talented and passionate volunteers; and between the organization and the wider Metrowest Jewish and general communities. Those partnerships continue to thrive, and in fact, have seen JFS in larger leadership roles.

Agency services continue to demonstrate nimble and flexible organizational behaviors that shift to address exigent needs. JFS/MW's deep and broad community based services occur in different locations and delivered to diverse populations; 80% of services occur outside the agency's walls. Over 5,000 individuals and families are touched by the agency's myriad services.

## **Impact Statement**

JFS Strategic Directions emphasize standing up for those left behind in society and constantly re-tooling to meet changing community needs.

JFS' leadership is committed to significant and continued organization improvement that includes constant review of financial health metrics. The programmatic goals are to ensure that all services of the agency demonstrate clear purpose, measurable impacts, high team performance, and responsiveness and relevance to the community's rapidly changing needs and to reach those in a responsible fiscal manner.

The past year's accomplishments include:

1. Continued the multi-year implementation of comprehensive, agency wide performance and knowledge measurement and impact system and the continued the implementation initial of the organization moving to one data collection and RMS system via Salesforce
2. Attracted philanthropic support for JFS' integrated model of academic and family assistance services for low income, immigrant children and families.
3. Led a Greater-Boston/Metrowest wide JFS Syrian Refugee Humanitarian Project that has captured the engagement of many hundreds of community members.
4. Reached and maintained Charity Navigator's highest 4 Star Rating with an overall score of 96.74.
5. Received extensive press coverage and awards for the social justice leadership represented by the Syrian Refugee Humanitarian Project.

Upcoming and continuing goals:

1. Be at the forefront of services that respond to poverty in the Jewish community and listen to, respond and align with the changing/evolving views and directions of community members and stakeholders.
2. Be at the forefront of creating college access and pathways for low income first generation students throughout Metrowest in partnership with Framingham State University and Mass Bay Community College.
3. Establish a Board Excellence Committee for development of best engagement and governance practices
4. Growth of JFS' fund resource capacities to support its work in standing up for those left behind in society.
5. Pilot new components in JFS services for low income immigrant children and families.

## **Needs Statement**

Only 22% of agency funding is public sector. Core impact programs require continued grantmaking and philanthropy. Reducing Achievement Gaps (educational, family assistance, food security and social achievement for poor, immigrant children and families) requires an additional \$30-40,000 per year as a result of regularly sunseting grants. Healthy Aging, Patient Navigator, chronic disease management and geriatric care management services for elders and caregivers require \$50,000 annually to meet impact goals; the JFS Family Assistance Program requires \$40,000 additional to meet objectives related to job and career development for clients. Foundation and donor support is needed as many clients receive free or heavily subsidized services without the possibility of insurance reimbursement or government funding for these essential programs.

### **CEO/Executive Director Statement**

JFS is mission driven.

Jewish Family Service of Metrowest (JFS) provides vital social, health and community services to alleviate suffering, enhance lives and support people in need.

JFS is nimble, it is demanding with high performance expectations and it plays very well in the sandbox with others. Collaborations to increase the scale and scope of impacts are strong and sophisticated.

The agency's social, health and community programs are expertly designed and orchestrated to strengthen community and improve circumstances for Metrowest (and Greater Boston) residents at every stage of life.

JFS is a steward, a champion of human dignity.

It recognizes that these remain dangerous times. Children...families...the elderly...everyone is impacted... and many are suffering. The pressures and demands can be suffocating. JFS is on the front line, where we belong...digging deep, getting things done...making right what shouldn't be wrong.

### **Board Chair Statement**

At JFS many of our successes relate to the active involvement of the Board, Management and Staff in recognizing emergent areas of urgent need and changes in our community and in adjusting our existing programs or establishing new programs to accomplish our mission. One of many challenges has been the identification of financial resources and securing the funding required, in the face of likely severe economic headwinds that will hurt clients, to accomplish these program activities. As members age and move on to other phases of life, the renewal of our Board is a critical factor in our continued success. These last two challenges have been attacked with diligence by Senior Management and Board Leadership. Our focus on major giving, the start up of a respectful campaign to raise an endowment fund, and constant improvements in our development team/strategy have been very productive. Thoughtful focus on potential new Board Members, screening by our Nominating/Governance Committee and an emphasis on Board involvement have helped JFS to accomplish many Board renewal objectives in the 2015 - 2017 time frame.

For me as well as many Board members there is pride in JFS as a sensitive, community focused, involved family services agency. We appreciate our forward looking Senior Management Team, diligent Staff, and Volunteers. JFS is where the "rubber meets the road" in our community. In addition, I have witnessed members of my own staff, community and friends who have been touched and helped by JFS services, from a staff member who adopted a child through JFS to an adult with many disabilities that the agency has helped. This further deepens my own commitment to the organization.

David Milowe

JFSMW Board President, 2017 -

### Service Categories

Family Services

### Geographic Areas Served

Metrowest wide as well as greater Boston and eastern Massachusetts for several specific programs.

Please review online profile for full list of selected areas served.

# Programs

## **JFS Family Assistance**

### **Description**

JFS Family Assistance provides confidential and respectful assistance/basic needs support to individuals and families to help them meet short-term challenges and remain independent and financially self-sufficient. JFS Family Assistance combines coordinated case management services with access to short-term financial assistance. It includes financial literacy education and connects individuals and families to services at JFS and to benefits and services available in the Metrowest community. JFS Family Assistance works closely with Combined Jewish Philanthropies, synagogues and other communal organizations to strengthen the community's safety net. Workshops and educational programs in addition to individual assistance are provided. Both short-term and more longitudinal support are provided to families.

In addition, JFS Family Assistance has been expanded to support immigrant families served through the agency's Reducing Achievement Gaps initiatives.

### **Budget**

\$250,000.00

### **Category**

Human Services, General/Other

### **Population Served**

Adults, Elderly and/or Disabled, Immigrant, Newcomers, Refugees

### **Program Short Term Success**

Has demonstrated nimble and immediate response to economic and family crisis and assistance needs

### **Program Long term Success**

JFS Family Assistance is at the front line of response to issues of hunger, poverty, unemployment and family stress in the Jewish and general community. Success will be 85% of participants will remain in stable housing (preventing foreclosure and eviction), 100% will have adequate food security for their family, 100% of eligible clients will have basic utilities paid for (prevention of shutoff of power, water, etc.); 95% will self-report that their services received have benefited the family.

### **Program Success Monitored By**

Monthly data reports to funding source  
Coordinated community review of program activities

### **Examples of Program Success**

Prevented single parent with young children from home foreclosure

Prevented elderly couple from homelessness

## **Reducing Achievement Gaps for vulnerable, immigrant children**

<b>Description</b>	<p>Most often the phrase “inner-city problems” brings a picture of sprawling city slums to mind. Yet inner city problems affect smaller urban centers as well. Reducing Achievement Gaps (RAG) is a comprehensive system of interventions to address the academic, family assistance and social needs of poor children of immigrant families in Framingham. RAG gives Framingham’s most economically and educationally challenged school age children and their families the help and resources they need to succeed in school and in life. There are multiple, connected components. Through tutoring and mentoring, RAG promotes children’s academic success. Through parental support and empowerment, and by helping families meet basic food needs and learn about nutrition and by providing case management and referral services to families overwhelmed by circumstance, it bolsters family stability, increasing the likelihood of success. RAG occurs in a low performance school needing special attention and resources.</p>
<b>Budget</b>	\$150,000.00
<b>Category</b>	Education, General/Other
<b>Population Served</b>	Children Only (5 - 14 years), Immigrant, Newcomers, Refugees, Families
<b>Program Short Term Success</b>	<p>There are specific successes and improvement expectations for the different components.</p> <p>Quantitative and qualitative measurements with pre &amp; post testing used to assess student achievement for the 65-70 3rd &amp; 5th grade students are available to review, they demonstrate continual improvement.</p> <p>The family assistance and food security programs- Weekend Nutrition, Healthy Harvest and Family Assistance- are evaluated on the number of people served and client feedback. It is a triaged model with the school guidance counselors identifying the most at risk families.</p> <p>25 families (100+ individuals) are part of the Weekend Nutrition Program and 70 families (250+ individuals) are part of the Healthy Harvest fresh fruit and vegetable distribution.</p> <p>35 families (140+ individuals) are receiving family assistance- case management. Family Assistance is also evaluated on success in accessing assistance, e.g., job placement, fuel assistance, housing, etc. Families in all these programs are tracked.</p>

**Program Long term Success**

The long term success is that these low income, immigrant children with complicated and compromised life circumstances will be ready for continued academic and social success. They will in the future graduate high school, move forward with education and career goals and be productive and successful citizens at the same rate as their middle class peers. RAG's academic interventions follows education specialist recommendations. There is significant concern about growing academic and social gaps for low income, vulnerable children. There is a wide body of literature, public policy and new intervention models that demonstrate that academic success for immigrant children such as those served by RAGs requires the integrated model that is being implemented-- one that increases the likelihood of success by combining academic and social support for children with parental support that helps families overwhelmed by circumstance meet basic needs and access to services that bolster stability.

**Program Success Monitored By**

AllStars (3rd grade) assessments measure math progress & homework completion. Students show a 40% increase in the math assessment over the year. Homework completion is an important indicator. Students are showing a 91% rate of homework completion and that % is rising. Wizards (5th grade girls only) are assessed in math, engineering and classroom performance. Math average scores have shown increases by 30-35% annually. Engineering skills are measured in an exercise that requires girls to build simple machines out of Legos. Average scores have increased by 30%. Wizards are also assessed by teacher surveys re: classroom performance and effort in math and science, based on report cards. Wizards made amazing progress compared to girls not enrolled in the program. They showed double the level of improvement in geometry, measurement, mathematical thinking, effort in science and math and overall science skills. A qualitative assessment provides data re: girls gender role perception.

**Examples of Program Success**

Students write notes to put in the "Bucket" when they see STARR (Safe, Tolerant, Positive Attitude, Respect, Responsibility) behavior. Many students have written to their mentors. Here is a quick, but indictative story: Jose stayed 20 minutes late with his volunteer mentor, wanting to finish his homework before he went home. Jose explained that it was a difficult assignment and he wanted to make sure he finished it with his mentor's aid. His parents do not speak much English and would not be able to help at home. So he and his mentor stayed and extra 20 minutes until he was done. He was SO proud of himself. Both he and his mentor wrote each other notes in the STARR bucket. He thanked his mentor for staying longer to help him and she wrote one about how proud she was of him for sticking with a hard assignment and finishing. It is rewarding to see how proud the students are when they finish and when they do a good job on their work.



## **JFS Immigrant and Refugee Services**

<b>Description</b>	<p>Immigrants &amp; refugees face many challenges upon entry and in attaining long term success, including acquiring citizenship. Finding affordable housing, establishing credit, accessing healthcare, finding jobs, advancing careers, feeding/clothing their families, academic success of their children, securing transportation, learning English, complying with immigrant/refugee status requirements and adapting to cultural mores are some of these challenges. JFS offers a constellation of culturally competent services targeted to new and established immigrants and refugees/asylees to assist them in meeting these challenges and in attaining and maintaining success:</p> <ul style="list-style-type: none"><li>Syrian Refugee Humanitarian Project</li><li>Refugee &amp; Asylee Resettlement</li><li>Citizenship Assistance</li><li>Youth Academic Achievement (see Reducing Achievement Gaps program)</li><li>Ready for Success Career Assistance</li><li>Emergency Family Stabilization (see JFS Family Assistance program)</li><li>Financial Literacy</li><li>Russian Community Services</li><li>English As a Second Language</li></ul>
<b>Budget</b>	\$300,000.00
<b>Category</b>	Human Services, General/Other
<b>Population Served</b>	Immigrant, Newcomers, Refugees, Families, Poor, Economically Disadvantaged, Indigent
<b>Program Short Term Success</b>	<p>100-120 immigrants submit citizenship applications annually</p> <p>20 refugees and asylees are resettled annually.</p> <p>Provides family stabilization assistance to 150 immigrants and refugees annually.</p> <p>250 immigrant families receive nutritional assistance annually.</p> <p>Annually serves 125 Russian/American children through art, culture, music and expressive classes/groups and Russian language classes. 100 Russian parents and over 100 Russian elders are served annually through education groups, Jewish holiday events, Jewish education and linkage to Family Assistance, food pantry and other services.</p>

<b>Program Long term Success</b>	<p>75% of immigrants and refugees assisted are successful in achieving educational and career goals to become self-sufficient, productive Americans.</p> <p>75% of immigrants and refugees assisted make a successful adaptation and in attainment of bi-cultural identity.</p> <p>80% of immigrants and refugees receiving citizenship assistance services successfully submit applications.</p> <p>90% of immigrants and refugees receiving family stabilization/assistance services have improved food security and avoid homelessness.</p>
<b>Program Success Monitored By</b>	<p>Program operations goals and work plans with defined metrics</p> <p>Tracking reports of people served across the different programs</p> <p>Monthly data reports to funding sources</p> <p>Coordinated community review of program activities</p>
<b>Examples of Program Success</b>	<p>In his native Iraq, SAM worked as an engineer. That all changed in 2005, when SAM was kidnapped by extremists, who believed him to be working for the “blasphemers,” the nickname they gave to the United Nations. After a miraculous release, SAM made the heart-wrenching decision to leave his beloved country and seek a safe haven in the States for himself and his family. With a heavy heart and dashed dreams, SAM emigrated across the world and landed in Metrowest. It was a serendipitous placement for SAM, who shortly after arrival was paired with JFS to provide him with services and resources specially designed to help make the transition to life in America feel more like a new and exciting adventure and less like a sad divorce from his homeland.</p> <p>Today, SAM holds a consultancy job in computer engineering and management and is pursuing his second Masters degree in Business Administration. He remains closely connected with JFS, now involved in giving to the organization he not long ago received from.</p>

## JFS Elder and Family Caregiver Programs

<b>Description</b>	<p>JFS offers a constellation of home and community based programs directed at serving the needs of older residents of Metrowest as well as their family caregivers. These services are designed to help elders live independently and safely in their own homes, to assist in the management of their medical challenges, to prevent hospitalization and out-of-home placement, to increase engagement and reduce social isolation, to help access needed medical services and to provide family caregivers with respite and support services. Programs include:</p> <p>Patient Navigator– providing frail elders with transportation and trained volunteer escorts to accompany them to medical appointments and facilitating comprehension of healthcare instructions by elders and family caregivers;</p> <p>Geriatric Care Management - offering elders assessment of needs, referral to needed services and quality care coordination;</p> <p>Homecare (63% of the total Elder and Family Caregiver budget) - utilizing, experienced Personal Care Assistants and Homemakers to assist elders and persons with disabilities with personal care tasks such as, bathing, grooming, dressing, meal preparation, light housekeeping, medication reminders, exercise, walking, and toileting on either a long or short-term basis;</p> <p>Chronic Disease Management – providing education and support to elders to help them manage chronic medical conditions;</p> <p>Healthy Aging Metrowest – Naturally Occurring Retirement Community (NORC) - offering a primary prevention approach to overall health and well-being for elders and adults with disabilities, living in public housing;</p> <p>Friendly Visitors - utilizing trained and responsible volunteers to spend time with elderly and disabled adults in order to decrease isolation through emotional engagement.</p>
<b>Budget</b>	\$900,000.00
<b>Category</b>	Human Services, General/Other Senior Services
<b>Population Served</b>	Elderly and/or Disabled, ,
<b>Program Short Term Success</b>	<p>Focusing on healthy aging, JFS programs have helped prevent unnecessary disease progression and complications by teaching hundreds of women and men to lower blood pressure and/or control diabetes by improving nutrition, exercising more and managing stress.</p> <p>Patient Navigators ensure that 100+ frail elders were able to make and keep over 250 essential medical appointments.</p> <p>Friendly Visitors helped reduce isolation and increase socialization among Metrowest elders.</p>

**Program Long term Success**

The JFS Elder Services Team help over 2,200 elders, annually, age in place, at home, in a safe and dignified manner, while reducing the utilization of costly nursing home care. It is estimated that a nursing home costs Massachusetts taxpayers \$46,500 per year, whereas home care costs Massachusetts tax-payers \$18,000 per year, yielding almost \$30,000 per year in savings for every elder who ages in place.

Hundreds of family caregivers have enjoyed peace of mind from the advocacy, care and service coordination afforded their parents or spouses, as well as increased personal time and decreased work disruption and corresponding income loss. Reduction in work absenteeism of care-takers also saves employers lost revenue. The average annual cost (to employers) per employee for fulltime, employed caregivers is estimated to be around \$2,110.

**Program Success Monitored By**

Monthly data reports to funders  
 Internal outcome measurement data  
 Coordinated community review of program activities  
 Client satisfaction

**Examples of Program Success**

This is a description from a client sharing her experience of having a patient navigator/medical escort:

*I am 92 years old and I want to be as independent as possible. That is why I moved into senior housing here in Framingham. My neighbor told me about JFS' patient navigator enhanced medical escort service and I called them for the first time in December. I have had 10 medical appointments since then (I counted). Half the time, I have had the same person, but even when I don't, it doesn't matter. They each contact me before the visit, pick me up, and help me in the visit if I need it and even send a report to my son. I don't want to be a burden and it gives me peace of mind that he doesn't have to miss work, yet I don't have to be alone. There was even a dentist who helped me when I had to have my teeth checked! I think the doctor spends more time with me when my escort is with me. Ethel S, client*  
 (Please visit Ethel's Story at the YouTube link:  
<http://tinyurl.com/JFS-Ethel> )

**Program Comments****CEO Comments**

JFS Family Assistance places the agency in the midst of significant issues of poverty, family disruption and food security that affect families with children, mid-late career adults and elders, in the Metrowest and Greater Boston community. Program design is always occurring, one includes customized job development and career mentoring; another for performance measurement and evaluation. Combined Jewish Philanthropies is a key partner and stakeholder. Community funding support has enabled a significant increase in JFS' capacity to be the front-line agency for the Jewish

and general community; and several foundations have added resources for our community poverty and hunger response.

JFS is serving community members who have limited choices, many cannot afford to purchase services many are low income but not eligible for public benefits. Elders and family caregivers require continuity of relationships, ongoing problem-solving, recognition that isolation and difficulty in navigating resource systems adds to stress and risk. New models for service delivery are being imagined and incubated, but again, are not revenue producing nor are they publicly supported.

The Cummings Foundation awarded JFS its prestigious 100K for 100 grant;

The Boston Globe has brought extensive attention to JFS humanitarian efforts with Syrian Refugees.

<https://apps.bostonglobe.com/metro/graphics/2017/03/the-last-refugee/series/through-the-closing-door/>

<https://apps.bostonglobe.com/metro/graphics/2017/03/the-last-refugee/series/threads-of-new-life/>

# Management

## CEO/Executive Director

**Executive Director**

Mr. Marc Jacobs

**Term Start**

Oct 1996

**Email**

mjacobs@jfsmw.org

**Experience**

Marc Jacobs, LICSW, has been the Chief Executive Officer of Jewish Family Service of Metrowest since 1996. Mr. Jacobs held senior staff and management positions in organizations serving youth and families at risk. He has led national training and curriculum projects. Mr. Jacobs is widely published in the areas of youth development, life skills education with adolescents and foster parent training. He holds Master's Degrees from Boston University School of Social Work and from Clark University. He received The Carlisle Foundation's prestigious Creative Entrepreneur Award for outstanding leadership and creative programming while taking an entrepreneurial approach to the human service field. Most recently he received the William James College Mental Health Humanitarian Award as well as the Sharp Social Justice Prize.

## Former CEOs

**Name****Term**

Ms. Helene Kress

Sept 1988 - June 1996

## Senior Staff

**Chief Operating Officer Lino Covarrubias****Title**

Chief Operating Officer

**Experience/Biography****Finance Director Elizabeth Grzela****Title**

Director of Finance

**Experience/Biography****Program Director Malka Young****Title**

Director, Healthy Aging and Geriatric Care Management

**Experience/Biography****Program Director Lucia Panichella****Title**

Director, Youth and Immigrant Services

**Experience/Biography**

**Program Director Diana O'Brien**

**Title** Director, Family Assistance

**Experience/Biography**

**Program Director Jayne Lampert**

**Title** Director of Development

**Experience/Biography**

**Program Director Rosemarie Coelho**

**Title** Director, Performance Management

**Experience/Biography**

**Program Director Amanda Coughlin**

**Title** Director, Program Operations

**Experience/Biography**

Staff Information

<b>Full Time Staff</b>	15
<b>Part Time Staff</b>	55
<b>Volunteers</b>	250
<b>Contractors</b>	10
<b>Retention Rate</b>	95%

Staff Demographics - Ethnicity

<b>African American/Black</b>	2
<b>Asian American/Pacific Islander</b>	2
<b>Caucasian</b>	38
<b>Hispanic/Latino</b>	23
<b>Native American/American Indian</b>	0
<b>Other</b>	0 5 Brazilian

Staff Demographics - Gender

<b>Male</b>	10
<b>Female</b>	60
<b>Unspecified</b>	0

Formal Evaluations

<b>CEO Formal Evaluation</b>	Yes
<b>CEO/Executive Formal Evaluation Frequency</b>	Annually
<b>Senior Management Formal Evaluation</b>	Yes
<b>Senior Management Formal Evaluation Frequency</b>	Annually
<b>NonManagement Formal Evaluation</b>	Yes
<b>Non Management Formal Evaluation Frequency</b>	Annually

## Plans & Policies

<b>Organization has a Fundraising Plan?</b>	Under Development
<b>Organization has a Strategic Plan?</b>	Yes
<b>Years Strategic Plan Considers</b>	5
<b>Date Strategic Plan Adopted</b>	May 2012
<b>Does your organization have a Business Continuity of Operations Plan?</b>	Yes
<b>Management Succession Plan?</b>	Under Development
<b>Organization Policy and Procedures</b>	Yes
<b>Nondiscrimination Policy</b>	Yes
<b>Whistleblower Policy</b>	Yes
<b>Document Destruction Policy</b>	Yes
<b>Directors and Officers Insurance Policy</b>	Yes
<b>Is your organization licensed by the Government?</b>	Yes
<b>Permit?</b>	Yes

## Risk Management Provisions

Professional Liability

## Collaborations

JFS is in broad and deep collaborations in all aspects of its work. Collaborations and partnerships include Combined Jewish Philanthropies, Framingham State University, Mass Bay Community College, Framingham School Department, Framingham ESL Plus, Jewish Community Centers of Greater Boston, Jewish Vocational Service, Jewish Community Housing for the Elderly, Framingham Public Housing, William James College, synagogues, churches and others.

## Awards

### **Awards**

<b>Award/Recognition</b>	<b>Organization</b>	<b>Year</b>
Sharp Social Justice Prize	Joukowsky Foundation	2017
Mental Health Humanitarian Award	William James College	2017



# Board & Governance

## Board Chair

<b>Board Chair</b>	President David Milowe
<b>Company Affiliation</b>	RBC Wealth Management
<b>Term</b>	May 2017 to May 2019
<b>Email</b>	dmilowe@jfsmw.org

## Board Members

<b>Name</b>	<b>Affiliation</b>	<b>Status</b>
Treasurer John Herrera	none	Voting
Immediate Past President Louis Kates	Starr and Fine	Voting
VP Allison Kates	none	Voting
Board President David Milowe	RBC Wealth Management	Voting
VP Melissa Roiter	none	Voting
Secretary Ian Rubin	none	Voting
Plus Thirty five additional members & past presidents	community volunteer	
VP Josef Volman	Burns Levinson	Voting
VP Michelle Wilen	none	Voting

## Board Demographics - Ethnicity

<b>African American/Black</b>	1
<b>Asian American/Pacific Islander</b>	0
<b>Caucasian</b>	40
<b>Hispanic/Latino</b>	1
<b>Native American/American Indian</b>	0
<b>Other</b>	0

## Board Demographics - Gender

<b>Male</b>	22
<b>Female</b>	20
<b>Unspecified</b>	0

## Board Information

<b>Board Term Lengths</b>	3
<b>Board Term Limits</b>	3
<b>Number of Full Board Meetings Annually</b>	5

<b>Board Meeting Attendance %</b>	85%
<b>Written Board Selection Criteria?</b>	Yes
<b>Written Conflict of Interest Policy?</b>	Yes
<b>Percentage Making Monetary Contributions</b>	100%
<b>Percentage Making In-Kind Contributions</b>	33%
<b>Constituency Includes Client Representation</b>	Yes

## Standing Committees

Executive

Finance

Governance and Nominating

Development / Fund Development / Fund Raising / Grant Writing / Major Gifts

## Comments

### **CEO Comments**

JFS is a strong niche organization, clear about its identity, its impacts and its strengths, and successfully managing to find its place and space in a sector that is now dominated by very large organizations and mergers, acquisitions, and re-structuring.

JFS has entered into new collaborations with larger entities, believing that JFS' nimble, community service delivery models add value to the strategic goals of its partners.

Quality results, high performance staff and earning the trust of stakeholders and community members are critical elements.

JFS is a connector/gateway organization and it incubates leadership. The organization has been successful in attracting a significant number of "next generation" younger Board members who are developing their leadership identities and has also attracted prominent community and corporate leaders. The Board has become more diverse on many different dimensions. Its members lead enormously busy and complicated professional and personal lives requiring individualized attention as to how to best develop and utilize their skills. This is both opportunity and challenge for management and Board leadership. The creation of a new and empowered Board governance/leadership development committee is one significant response.

# Financials

## Fiscal Year

<b>Fiscal Year Start</b>	Oct 01, 2016
<b>Fiscal Year End</b>	Sept 30, 2017
<b>Projected Revenue</b>	\$3,000,000.00
<b>Projected Expenses</b>	\$3,000,000.00
<b>Endowment?</b>	Yes
<b>Endowment Value</b>	\$975000.00
<b>Spending Policy</b>	Percentage
<b>Percentage</b>	4%
<b>Credit Line?</b>	Yes
<b>Reserve Fund?</b>	Yes
<b>Months Reserve Fund Covers</b>	4

## Detailed Financials

### Revenue and Expenses

<b>Fiscal Year</b>	<b>2016</b>	<b>2015</b>	<b>2014</b>
<b>Total Revenue</b>	\$2,811,997	\$2,747,083	\$2,412,819
<b>Total Expenses</b>	\$2,544,657	\$2,347,396	\$2,242,818

### Revenue Sources

<b>Fiscal Year</b>	<b>2016</b>	<b>2015</b>	<b>2014</b>
<b>Foundation and Corporation Contributions</b>	\$686,000	\$686,004	\$591,400
<b>Government Contributions</b>	\$0	\$0	\$0
<b>Federal</b>	--	--	--
<b>State</b>	--	--	--
<b>Local</b>	--	--	--
<b>Unspecified</b>	--	--	--
<b>Individual Contributions</b>	\$915,037	\$995,125	\$760,691
<b>Indirect Public Support</b>	--	--	--
<b>Earned Revenue</b>	\$751,175	\$702,980	\$660,567
<b>Investment Income, Net of Losses</b>	\$59,257	(\$29,763)	\$48,429
<b>Membership Dues</b>	--	--	--
<b>Special Events</b>	\$400,528	\$392,736	\$351,732
<b>Revenue In-Kind</b>	--	--	--
<b>Other</b>	--	--	--

## Expense Allocation

Fiscal Year	2016	2015	2014
Program Expense	\$2,207,301	\$2,013,392	\$1,907,756
Administration Expense	\$186,307	\$175,375	\$185,745
Fundraising Expense	\$151,049	\$158,629	\$149,317
Payments to Affiliates	--	--	--
Total Revenue/Total Expenses	1.11	1.17	1.08
Program Expense/Total Expenses	87%	86%	85%
Fundraising Expense/Contributed Revenue	8%	8%	9%

## Assets and Liabilities

Fiscal Year	2016	2015	2014
Total Assets	\$4,131,206	\$3,834,853	\$3,447,730
Current Assets	\$2,874,147	\$2,611,670	\$2,277,531
Long-Term Liabilities	\$0	\$0	\$0
Current Liabilities	\$168,433	\$139,421	\$151,984
Total Net Assets	\$3,962,773	\$3,695,433	\$3,295,746

## Short Term Solvency

Fiscal Year	2016	2015	2014
Current Ratio: Current Assets/Current Liabilities	17.06	18.73	14.99

## Long Term Solvency

Fiscal Year	2016	2015	2014
Long-Term Liabilities/Total Assets	0%	0%	0%

## Top Funding Sources

Fiscal Year	2016	2015	2014
Top Funding Source & Dollar Amount	--	--	--
Second Highest Funding Source & Dollar Amount	--	--	--
Third Highest Funding Source & Dollar Amount	--	--	--

## Capital Campaign

Currently in a Capital Campaign?	No
Capital Campaign Anticipated in Next 5 Years?	No

## Comments

### CEO Comments

JFS has been a careful steward of its funds, much of it philanthropically derived; only 22% of revenue is from public-governmental or insurance sources. Over the past 6 years, cautious and effective management has led to increased liquidity and there is no long term debt. An endowment fund started within the past 3 years, tied to long range sustainability. At the same time, innovative and very relevant program designs have emerged, positioning the organization to be an attractive investment to donors.

### Foundation Staff Comments

Financial summary data in the charts and graphs above is per the organization's audited financials.