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Jewish Family and Children's Services: A Pioneering Human Service Organization (1850–2008)

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Jewish Family and Children's Services of San Francisco, the Peninsula, Marin, and Sonoma Counties is a pioneering nonprofit human service organization that has delivered services for 157 years. Over the course of its history, the organization has transformed itself from an all-volunteer agency delivering aid to immigrant families during the Gold Rush era to a \$30 million nonprofit human service organization offering a full-range of services to adults, children, and families. The history of Jewish Family and Children's Services sheds light on the importance of strong leadership, strategic planning, external relationships, and strong donor support.

KEYWORDS *Organizational history, nonprofit organization, Jewish community*

INTRODUCTION TO JEWISH FAMILY AND CHILDREN'S SERVICES

Jewish Family and Children's Services of San Francisco, the Peninsula, Marin and Sonoma Counties (JFCS) is a community-based nonprofit organization delivering comprehensive services to Bay area residents of all faiths and life stages. The roots of the organization can be traced to two agencies established to meet the needs of Jewish immigrant families settling in the Bay area during the Gold Rush era; namely the Eureka Benevolent Society

All written and verbal sources used to develop this case study can be found in the Appendix B.

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(established 1850) and the Pacific Hebrew Orphan Asylum (established 1872) that later became Jewish Family Service Agency (JFSA) 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 established on the West Coast, JFCS has historically served as a first-responder for Jewish individuals and families in crisis. Over its 157 years, JFCS has grown along with the San Francisco community and its network of nonprofit human service agencies. As it expanded to communities outside of the city of San Francisco, JFCS developed programs to meet the changing needs of the community.

The JFCS main office is located in the Miriam Schultz Grunfeld Professional Building on Post Street in San Francisco. JFCS has offices in five geographic locations: San Francisco, Marin, the Mid/North Peninsula, the South Peninsula, and Sonoma County. Each of these branches delivers services in the agency's four core service areas: Seniors, Children and Families, Individuals and Couples, and Émigré's/New Americans. The agency also operates Parent's Place and the Émigré Teen Center in San Francisco, an Émigré Services Department, a licensed day facility for the elderly named the L'Chaim Wellness Center, and two businesses (the Utility Workshop and Cleanerific). JFCS owns the buildings at its twelve service sites.

JFCS has an operating budget of almost \$30 million, with 80% of the expenditures devoted to salaries, benefits, taxes and insurance. Fees are the largest source of revenue (65%) based on a sliding scale to be able to serve anyone, regardless of income. The second largest source of revenue includes annual campaigns seeking individual contributions through mail and phone solicitation, endowment campaigns, an annual gala, and planned giving (bequests and trusts). Corporate and foundation grants comprise 10%–15% of the budget along with government funding related to fees for service (e.g., MediCal). Other sources of revenue include the Jewish Community Federation Endowment, social enterprise, and the JFCS Endowment. In its third year, the JFCS endowment campaign was launched to raise \$35 million over 10 years (2005–2015) to eventually cover 10% of the operating budget.

The agency's Board of Directors includes 30 members who work in partnership with the executive director to govern JFCS through the use of multiple committees and subcommittees that meet several times a year. JFCS serves 58,000 individuals, employs a staff of 1000, and engages approximately 2000 volunteers in addressing the mission of providing professional and volunteer services to develop, restore, and maintain the competency of families and individuals of all ages. JFCS delivers services for the following populations:

- *Individuals and couples*: Services include mental health, education, disabilities, referral, and support for a host of life problems including bereavement and domestic violence.

- *Children, youth, and families*: JFCS delivers diverse programs for children, youth, and families including: (a) Parents' Place (a nationally-recognized Resource Center), (b) Adoption Connection (a full-service licensed adoption agency), (c) Team Tzadek (community service for teens), (d) Family Mediation Center, and (e) YouthFirst (a program to help youth transition into adulthood). JFCS also offers services addressing non-traditional Jewish families, disabilities, food and weight, and domestic violence.
- *Seniors*: JFCS operates the award-winning Seniors-at-Home program, the most comprehensive provider of at-home care for the elderly in the Bay area. This program meets the individualized needs of seniors in their own homes with case management, money management, meal delivery, cleaning, counseling, conservatorship, and end-of-life care. JFCS offers seniors opportunities for community involvement through volunteer activities, workshops, and events. Although it is a separate nonprofit organization, JFCS helped develop the Rhoda Goldman Plaza, a residential program for seniors, and actively delivers services to Plaza residents.
- *New Americans/Émigré services*: 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. Resettlement caseworkers speak many languages including Russian, French, Spanish, and Hebrew to help newcomers make the transition by using their native languages.
- *Financial aid/assistance*: JFCS's sliding scale assures that clients receive quality services regardless of income and financial assistance, scholarships, and loans are available.

FROM THE GOLD RUSH TO THE HOLOCAUST (1850–1950)

In the mid-19th century, San Francisco attracted people from all over the United States and Europe seeking their fortune in the Gold Rush era. Among those was August Helbing, a Bavarian Jew who moved from New Orleans to San Francisco in 1849 and opened a dry goods business. Helbing noticed that immigrants arriving in California were often poverty stricken, sick, and in distress. Combining the Jewish values of caring with the frontier spirit, Helbing, along with 12 other Jewish men founded the Eureka Benevolent Society (EBS) in 1850 to relieve the suffering of Jewish immigrants arriving in California. Society members would meet the ships entering 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 1872, independent of the EBS, the Pacific Hebrew Orphan Asylum was established under the leadership of Temple Emanu-El (the oldest Reform Jewish congregation in the Bay Area) to provide a place for Jewish orphans

and children whose parents could not adequately care for them. Although separate organizations, the EBS 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 the EBS died, leaving behind an agency supported by 1000 volunteers and dispensing \$200,000 annually.

Between 1896–1905, 6,000 Russian Jews settled in the Bay Area with help from the EBS. The Federation of Jewish Charities was chartered in 1910 to organize and centralize fundraising for Jewish community causes and helped Jewish agencies provide shelter, employment training, food, clothing, and healthcare. World War I and the Russian Revolution of 1917 triggered a new wave of Jewish immigration between 1914–1918. The EBS helped newcomers adjust and settle into their new surroundings.

In 1921 the Pacific Hebrew Orphan Asylum changed its name to Homewood Terrace, reflecting a move away from the orphanages of the past to a more community-oriented childcare agency. Homewood Terrace became the first cottage-type childcare campus in the United States and provided its 125 residents with a commissary, gymnasium, synagogue, and hospital. In 1929, the EBS changed its name to Jewish Family Service Agency (JFSA) and expanded to offer modern services such as counseling and family education.

In the 1930s and 1940s JFSA continued to grow in order to meet community needs resulting from the Depression of the 1930s and the needs of refugees fleeing the Holocaust in the 1940s and beyond. Funding for the agency came through the Jewish Welfare Federation, Community Chest, the Jewish National Welfare Fund, and donations. In 1940 JFSA's annual budget was \$86,700 and they served approximately 900 people. In 1943 the organization established its first business venture called the Utility Workshop, a work program for refugees and elderly immigrants. The workshop offered jobs such as folding, packing and sorting materials, addressing labels, and simple manufacturing.

THE POST WORLD WAR II ERA (1950s AND 1960s)

The San Francisco Jewish community expanded in the two decades following World War II. JFSA and other Jewish organizations developed services to meet the continuing stream of immigrants and American-born Jews who were moving to San Francisco. This was also a period marked by an explosive growth of Jewish philanthropy. San Francisco residents and former immigrants who had earned considerable wealth began to establish family foundations and charities to address the social welfare needs of the community.

From 1929–1958 Hyman Kaplan was the Executive Director of the JFSA until he was replaced by Dr. David Crystal. During the 1950's JFSA offered re-settlement services to Hungarian and German émigrés but primarily delivered

psychiatric services to adults. This reflected not only what was popular in the field of social services, but also the perspectives of the executive director. 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 society. During the 1950s the agency grew little and focused primarily on providing therapy to adults.

The 1960s was a time of expansion, new opportunities, and an organizational self-assessment in relationship to the needs of the community. In 1959 David Crystal sent a memo to the Board calling for attention to the needs of the Jewish elderly. The memo acknowledged that JFSA should identify the concrete needs of this population and develop services to help them maintain their independence. Dr. Crystal suggested a series of programs to operate within the existing agency structure and provide flexible services in accordance with client needs.

The Utility Workshop continued to employ new émigrés and JFSA collaborated with numerous local businesses (e.g., the California Ink Company and India Imports of San Francisco) to generate projects. The Utility Workshop offered paid work, health insurance, and community integration for new Americans; however, it experienced financial hardships in the early 1960s. In 1961 the Federation began to provide funds to cover its operating budget due to the numerous benefits received by workshop employees.

In 1966 the JFSA opened a branch office in the Peninsula. The latter years of the 1960s were a time when the Board and the executive director experimented with several pilot projects. JFSA began to provide its clinical services under contract to other agencies serving the Jewish community. In 1967 caseworkers began consulting with the nursery school at the Jewish Community Center and offered group counseling for the parents. JFSA also explored collaborative counseling arrangements with local synagogues and other organizations. These pilots gave the agency an opportunity to share their clinical expertise and training with other agencies.

In addition, JFSA became involved in local and state political advocacy efforts. Board members sent letters endorsing legislation and took political stands in relation to California's mental health budget cuts and amendments to the Social Service Act. The Board considered local problems such as those "in the Haight-Ashbury District—among the hippies—and the alleged high proportion of Jewish young people in this group." JFSA initiated a six-month pilot to employ a street-level caseworker to assess the scope of how the movement was affecting Jewish youth and why they identified with the movement.

SERVICE EXPANSION (1970–1979)

The reduction in Federation funding along with state and local budget cuts

made it clear that the Board needed to be more involved in the financial oversight of the organization. In 1971, the board president stressed the need to secure funding sources other than the Jewish Community Federation to implement new programs. JFCS began to aggressively pursue foundation funding and individual donors. Despite their financial concerns, in 1972 and 1973 JFSA opened a branch office in Marin, a youth outreach program in the Peninsula, expanded its child guidance services to nursery schools, hired a child psychologist, initiated a Widow/Widower Program, launched the Women's Volunteer Corps to provide services to Jewish elderly in the community, and initiated the Kosher Nutrition Project to provide hot lunches to Jewish elders.

JFSA and Homewood Terrace had historically operated separately but collaboratively. This was the norm as most large cities in the United States had established both a JFSA and a Jewish Foster Care Agency for children. In the 1960s and 1970s many cities began to merge child and adult service agencies. In 1970 David Crystal and the board president participated in a Jewish Community Federation study of Homewood Terrace. In this context, there were discussions about consolidating services and merging JFSA with Homewood Terrace. While these conversations were unfolding, JFSA developed its children's mental health services and expanded its consultation to congregations and other organizations.

Discussions about a merger with Homewood Terrace and mutual program planning continued for several years; however, collaborative efforts were difficult due to tension surrounding the proposed merger. In 1976, JFCS found that less than half of the children residing in Homewood Terrace were Jewish, suggesting a shrinking demand for out-of-home placements for Jewish children and an interest in more efficient and less costly alternatives to residential placement.

After years of negotiations, a merger between Homewood Terrace and JFSA was completed on November 1, 1977. The purpose of the merger was to provide comprehensive services to the Jewish community and meet the needs of a changing society. The merger was a joint decision between the boards of both Homewood Terrace and JFSA. To reflect the inclusion of children's services, the merged agency legally changed its name to Jewish Family and Children's Services (JFCS). The boards of both organizations formed a 25-member JFCS Board and Dr. David Crystal held the Acting Executive Director position during a national search, which ended on June 30, 1979, when Werner Gottlieb was hired.

Homewood Terrace was a larger organization and had considerable assets in the form of property. The merged budget of both entities was \$2,188,535 in 1979 (reflecting an increase of JFCS revenues from \$1,698,844 in 1978) (Appendix A). The Merger Committee opted to halt the intake of new cases to the group homes as of July 1, 1977, and planned for a gradual phasing out of the group homes to provide adequate time to plan for the

needs of the residents. While the merger was difficult for the staff members in both agencies, there was celebration of the merging of the two oldest agencies serving the San Francisco Jewish community.

In 1978 the JFCS Board discussed whether to continue the group homes inherited from Homewood Terrace or to close the program, especially to address the anxieties of the residents and staff about an uncertain future. These discussions reflected larger conversations 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 residential treatment homes and begin selling the Homewood Terrace properties that were unsuitable for residential programming.

While the merger with Homewood Terrace dominated the attention of the JFCS Board, by 1974 there was also a growing concern about the Russian refugee situation. For years the U.S. Government had funded resettlement programs; however, the budget was scheduled to be significantly reduced. At the time, the JFSA Émigré Resettlement Program consisted of four Russian-speaking volunteer case aids and a part-time Russian-speaking worker who assisted the program supervisor. JFSA noticed increases in the number of Russian émigrés served. In the first four months of 1976, they received 61 Soviet émigrés, three times as many for the same period in 1975. An inter-agency committee of Jewish agencies was formed to strengthen and improve émigré services.

During this 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 by the U.S. Government to plan for a minimum of 500 émigrés to be partially covered by a federal block grant. By the summer of 1979, the agency received a request to increase the number to 650 individuals for resettlement. In addition, as part of the aftermath of the Vietnam War and the thousands of refugees in Southeast Asian refugee camps, JFCS was asked to initiate a program to help resettle Southeast Asians. JFCS hired one person specifically for this purpose to staff the Southeast Asian Refugee Resettlement office.

The volume of Russian émigrés was reaching historic levels for San Francisco. In January 1979 Anita Friedman was appointed the Coordinator of Émigré Services based on her success with Russian émigrés at Jewish Vocational Services. The Émigré Program consisted of one and one-fifth staff and one clerical person in early 1979. By the end of the year, the program had grown to a staff of eight plus two clerical workers.

CONSOLIDATION AND EXPANSION (1980–1985)

The first half of the 1980s was a time for the organization to regroup under new leadership and consolidate programs and policies with Homewood

Terrace. In 1980 the executive director introduced a new organizational chart that delegated specific agency responsibilities to department directors, accountable to the executive director. Three department directors formed an executive committee to oversee programs, policy, and the administration of 55 full-time and 34 part-time employees.

As Federation funding continued to decrease, JFCS applied for more foundation grants to support programming. Board members recognized the need for new sources of revenue and formed a Long Range Financing Committee. In late 1980 JFCS secured philanthropic funding for the first three years of a new program called Parent's Place that included a new parenthood program and telephone consultation services. The agency purchased its first property, a Victorian building on California Street to house the program. In 1981 JFCS continued to feel pressure from increasing budget cuts. Grant proposals were submitted to supplement program costs and board members attended a seminar on fund-development. The Board also developed agency policies and procedures for intake, including a fee policy to increase fee income by 20%.

Bernard Werth joined the Board in 1981, becoming the Treasurer in 1982, and began a comprehensive assessment of the agency's financial situation. Mr. Werth recalls that neither the executive director nor the board members had experience with nonprofit finance or budgetary controls. Mr. Werth initiated early changes such as the computerization of the financial reports, establishing the JFCS Endowment Fund, developing a budgeting system, ensuring that the agency had the proper insurance coverage, ensuring that their investments were being managed properly, and helping the Board become more knowledgeable and engaged in fiscal oversight of the agency. During this time, the Board authorized the development of a management information system to provide data on service outcomes and effectiveness. This proved to be an extremely beneficial and forward-thinking decision. Also in 1982, the Board launched a development committee to establish a fundraising system and Anita Friedman was appointed assistant executive director while also maintaining her position as director of the Émigré Department.

In 1982 Parents' Place opened as one of the nation's first family resource centers and the first of its kind in San Francisco. Parents' Place offered a place for new parents and their children to interact and receive comprehensive services. Also in 1982, the Homewood Terrace Child Welfare League Study noted the movement away from residential care and toward a family-centered approach. These changes initiated an internal needs assessment concerning adoptions, foster care, and family day care. The agency initiated a pilot program offering support groups for post-adoptive parents and conducted a foster care needs assessment.

A proposal for the Adoption Services Program was approved in 1983. A JFCS needs assessment had uncovered an unmet need for adoption services

in the Jewish community. This was a transition time in the field of adoptions as a movement toward open adoptions was growing. Birth moms were approaching lawyers rather than agencies so that they would have more information about adoptive parents. 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 and placement services for families securing adoption through lawyers.

In 1983, Anita Friedman led a board discussion on the political context of JFCS operations. She addressed the current economic crisis and the shift of responsibility for human services from government to the private sector (Reganomics). Stressing the relevance of the agency's services and needs of the community, she helped to launch a series of conversations about the financial independence of JFCS. In late 1983, the Board hired a development coordinator to strengthen the fundraising program, a controller, and hosted its first fundraising event called "Friends of JF&CS."

In 1983, the board president and executive director initiated conversations with the Jewish Community Federation to re-examine the funding relationship between the two agencies. Despite their growing caseloads, JFCS had been turning people away and introduced potential program cuts as a result of funding changes. The Board sought to help the Federation become more aware and responsive to the needs of the local Jewish Community. Board members agreed that publicity was key and they published a stream of articles about the funding relationship.

The Board began to look more closely at its programs and realized that both the Utility Workshop and Homewood Terrace served a large non-Jewish population. Given insufficient resources to serve the entire community, the Board examined the programs within the context of the needs of the Jewish Community. In early 1984, the Committee on Children's Services 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 community providers were uneasy about the decision and concerned about the children. JFCS moved ahead and phased out the residential program between 1984 and 1986. Staff prepared long-term clinical plans for each resident to ensure the maximum continuity.

In 1984 the agency made revisions to its mission statement and hired a consultant to develop a detailed fundraising plan. The initial fundraising plan involved donor solicitation via a new agency brochure and a solicitation letter mailed to a list of 1000 names provided by board members. In the summer of 1984, JFCS instituted a membership campaign and by 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 conducted a special fundraising event in May 1985.

Another major change involved the decision to seek a new executive director when the Board decided to replace Werner Gottlieb, who had strong

clinical skills, with someone who had stronger management skills. Given a financial settlement that recognized his years of service to the agency, the transition went smoothly as Anita Friedman (Assistant Executive Director) became the interim Executive Director while the Board Selection Committee initiated a search.

A NEW LEADER AND A NEW STRATEGIC PLAN (1985)

Anita Friedman was selected as the new Executive Director of JFCS and the Board announced the decision on January 24, 1985. It became clear that Anita had a different vision for the organization than her two predecessors as she viewed JFCS as a full-service organization where people of all income levels could find help for their life's challenges. In 1985 the agency was serving over 11,000 individuals and had a budget of approximately \$3 million. Anita recalls that JFCS was struggling financially, had a long wait list, few resources to purchase needed items such as computers, and employed an unhappy staff. She acknowledged that these challenges created opportunities for her and the organization to learn and grow together. Anita's first task as executive director was to develop a strategic plan that identified the following eight initiatives:

1. To define and limit the scope of service delivery within the context of the mission;
2. To shift staffing patterns to support central 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 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: (a) service capacity of agency resources, (b) costs of programming, (c) potential income generation, and (d) relevant information about the agency's clientele.

Board development was a key strategy to generate change throughout the organization. The Board was comprised of well-intentioned people but it was not well-rounded and members had not taken an active role in fundraising or development. Anita set about to develop a 21st-century board that represented a broad section of the Jewish community and comprised of people who knew what was expected of them in their governance roles. Board guidelines were established, members received training opportunities, and committees were developed.

Although the organization had always been involved in political advocacy, Anita emphasized increased visibility. In 1985 the Board involved themselves in several political issues. The Public Issues Committee drafted a letter to President Ronald Reagan opposing changes in the tax code related to charitable contribution and acted in opposition of Senator Montoya's Bill to mandate pre-divorce counseling. They also opposed California Assembly Bill 80 to prohibit abortion for unmarried minors without parental permission and supported a number of legislative actions that were in line with the agency's mission and vision.

Agency development continued to be a priority. The Friends Campaign of 1985 raised close to \$75,000 through donor solicitation and an advertisement in the Jewish Bulletin. The first issue of the agency's newsletter, named Outlook, was published in February and the organization scheduled a special event to commemorate the agency's 135th anniversary, which grossed over \$48,000. In April 1985, a three-year development plan was approved to expand membership, host an annual event, expand the August Helbrig Fund, define mechanisms for contributions, establish a planned giving program, and produce agency marketing literature.

Service programming continued to expand to meet the growing needs of people of all ages in the local Jewish community. In 1985 JFCS received \$25,000 to fund a Children of Divorce project, enabling the agency to reach more families, schools, and daycare centers. Foundation grants were also received for: (a) senior outreach to serve Jews living in poverty, (b) a Parents' Place Volunteer Coordinator, (c) a Children's Institute to provide outpatient psychotherapy, (d) computer services, and (e) funds to expand the Home Support Services Program for the elderly.

IMPLEMENTATION OF THE STRATEGIC PLAN (1986–1989)

With a new leader at its helm and an expanded vision, JFCS focused on implementing its strategic plan. The agency expanded services to clients of all ages in all three counties and continued to apply for, and receive, foundation grants to support these initiatives. Branch sites were remodeled to increase service capacity and additional staff were hired.

During these years the Board worked closely with Anita to develop fundraising plans in order to become financially diversified and self-sufficient. Board President Seisel Maibach, (1986–1988) recalls many board discussions on how to solicit donations and develop social enterprise ventures based on what was needed in the community. For example, based on successfully-delivered home support services to the elderly through volunteer efforts, JFCS embarked on a business venture (Help at Home) based on the long waiting lists for these services. In 1988 a fee-for-service program was implemented to provide home care, meal delivery, laundry, personal affairs management, and/or emergency response.

In 1987 JFCS hired a public relations director to streamline grant writing and establish a development department. The Board continued to focus on fund development with the annual Friends Campaign, a Tribute Fund for contributions in honor of friends and relatives, a solicitation program to build the endowment, and an annual fundraising gala. The agency adjusted its fee structure several times based upon a desire to reflect clients' ability to pay and the goal of increased fee income.

In 1986 JFCS entered a new program area with the arrival of the AIDS epidemic. In response to the growing crisis, the Jewish Emergency Assistance Network proposed that Jewish agencies prioritize community education and financial and mental health assistance to the families of AIDS victims. JFCS developed the first Jewish AIDS outreach program in the United States when it received a \$30,000 grant to initiate the AIDS Family Assistance Project to deliver counseling and emergency financial assistance.

In addition to delivering AIDS related services, JFCS also expanded other areas related to HIV and AIDS. The Board represented the organization on local and national political issues and involved themselves politically on issues of mandatory AIDS testing. In 1988 the agency developed a policy on AIDS legislation that opposed discrimination against persons with AIDS and promoted community education, prevention, and advocacy.

The second wave of Russian emigration began in 1986. In 1987 Anita requested additional funds from the Jewish Community Federation to meet increasing resettlement needs. In 1988 the numbers of people 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 the Federation and federal matching grant reimbursements.

JFCS experienced a growth spurt in its array of services during these years. The number of cases opened in 1987 was 62% greater than in the same period in 1986 and went up another 48% in 1989. 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 services. During the 1987/1988 year, the agency served 15,887 individuals, an increase of almost 2000 people.

CONTINUED GROWTH AND EXPANSION (THE 1990s)

JFCS continued to grow, expand, and become increasingly self-sufficient. The Board and executive director worked to diversify agency revenues and an Endowment/Special Gifts Subcommittee developed a long-range plan to increase the permanent endowment through the development of the Heritage Circle, a program that established donor-designated funds to honor loved ones. The economic recession at the end of the 1990s was problematic as the demands for services were increasing and allocations from both United Way and the Federation were neither dependable nor expected. To continue to finance their programs at existing levels, the agency pursued foundation support, donations, and increased income from fees for service. In 1995 JFCS developed a 24-Hour GIFTLINE for people to donate memorial, honorific, or special occasion gifts to the organization and established a New Enterprise Committee.

JFCS continued to advocate on both local and national levels. Not only were letters written and petitions signed, but the agency began making financial contributions to support campaigns and initiatives. JFCS 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 for the frail elderly. They also lobbied and made a public statement against the closing of the Mount Zion Hospital Crisis Clinic in 1991, adopted an agency policy on long-term care, advocated for financing of long-term care, and in 1993 took an official position in opposition to anti-gay discrimination by the Boy Scouts of America.

The Sonoma County branch office opened in February of 1990, expanding JFCS services to four counties. In 1991 the agency developed services related to the Persian Gulf War that included a hot-line, drop-in groups, individual counseling, and crisis consultation. In 1994 Dream House opened to serve women and children leaving domestic violence situations. The Adoptions Program grew and in 1996 the program expanded its foster services to Napa, Yolo, San Joaquin, and Sacramento counties.

Parents' Place expanded to include such services as a new youth volunteer program, a paid summer internship for teens, and mental health consultation services to after-school programs and camps. The Holocaust survivor programs grew during the late 1990s to deliver services to a growing number of survivors residing in the Bay area. The number of Holocaust survivor clients served by the agency doubled between 1995 and 1998, with 350 survivors being served by JFCS in 1998. In 1999, Sonoma County began to offer Ways to Work which assisted low-income families with expenses associated with moving from welfare to work.

The Soviet Émigré Resettlement situation continued to change during this decade when the U. S. 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, they asked community members to volunteer, donate furniture and household goods, and local businesses to provide employment opportunities for émigrés. JFCS worked closely with Jewish Vocational Services to jointly operate an Émigré School offering émigrés orientation to their new country, casework, assistance with housing, and vocational and English language programs.

In 1992, the Board monitored President Bush's proposed changes in federal funding of refugee resettlement that included a Private Resettlement Plan. The agency negotiated with other providers and the government on how to respond to this potential situation. In spite of the cuts, JFCS incorporated the L'Chaim Center for Frail Russian Elderly. Full funding for this program was provided by the Jewish Community Federation and oversight was provided in collaboration with the Mount Zion Institute on Aging and the Jewish Community Center. In 1999 the Center was licensed as an adult day health care facility. The Judah Street Center opened as a multiservice center that included the Émigré Department and the L'Chaim Adult Day Center.

JFCS also monitored changes in the federal welfare reform program as well as cuts in Medicaid and MediCal that meant reduced funding to community providers and the possibility of substantial increases in caseloads and client needs. The federal government was also making plans to eliminate a number of benefits to non-citizens, which also increased the demand for the agency's services. JFCS spearheaded a Citizenship Initiative in 1995 with Catholic Charities and other agencies serving refugees and immigrants, joined a Family Services Alliance to respond to the welfare reform policies, and Anita Friedman joined the Governor's Welfare Task Force.

In the late 1990s the Board developed plans to move to a new and larger location in San Francisco. Employees and board members note that the physical space occupied by each of the sites is an important aspect of JFCS because the last thing that you need when you are feeling low is to walk into a place that feels depressed. In 1996 the Board purchased a property on Post Street to house the Miriam Schultz Grunfeld Professional Building, the current location of the main office. An endowment campaign raised funds to construct the building that would be attached to the Rhoda Goldman Plaza for Seniors (formally the Scott Street Project).

EXPANDING SERVICES WITH APPROACHING THE 160TH ANNIVERSARY (2000–2008)

Entering the 21st century was a time to reflect upon the changes of the previous 15 years. The Board was well-developed and continued to look for ways to improve its governance through annual board self-examinations. In 2001 JFCS unveiled a new website to educate more people about the organization as well as encourage more donations and volunteering. JFCS

continued to improve its branch services and facilities. New properties were leased or purchased in Palo Alto, San Francisco, and San Rafael. An agency-wide Energy Conservation Program was launched in 2001 to reduce unnecessary energy use in all of the offices. In 2006 the agency purchased a building in San Mateo for the JFCS North Peninsula Office (the Eleanor Haas Koshland Center).

This was an important time for the Jewish Community at large as the Rhoda Goldman Plaza, a senior living program serving the elderly in all income brackets, was under construction. The Rhoda Goldman Plaza and the JFCS Miriam Schultz Grunfeld Professional Building were completed in the summer of 2000. By the end of 2001 the Rhoda Goldman Plaza was almost completely full with 120 residents. In 2004 JFCS ended its contract to manage the Plaza to promote local self-management.

Fundraising and development continued to improve and each year donor gifts and bequests increased. The 150th anniversary of JFCS was celebrated in 2000 with the Platinum Anniversary Gala. The Board 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. The JFCS annual campaign goal of \$2 million was achieved through telethons and personal solicitations. The agency also began to explore new approaches to endowment giving, such as estate planning. In 2002 the Émigré Community hosted its first annual Émigré Gala to raise awareness and funds for the L'Chaim Senior Center and for Émigré Youth Services, ultimately raising \$25,000. The Russian Émigré community has become a large donor base for the organization over the past five years, raising \$350,000 in 2007. It is clear that the émigrés in the Bay area want to give back to the organization that helped to resettle them.

The programs developed in the 1990s and earlier began to generate new projects. For example, 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 branches in four counties continued to develop their own identities and services. Requests for services increased, particularly after the terrorist attacks of September 11, 2001, that related to mental health issues as well as the economic hardship and unemployment caused by the recession.

Adoption Connection became one of the largest 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 and internationally. In 2002 the State budget included funding to support a second shift at the L'Chaim Adult Day Health Services program, allowing the agency to serve their wait list of over 150 people.

In 2002 JFCS expanded services delivered to Holocaust survivors. The agency also worked with the United States Claims Conference to obtain reparations for survivors. Survivors often required assistance navigating the paperwork needed to file for available reparation and compensation funds. JFCS was able to successfully negotiate a grant increase from the Claims Conference to serve Bay area survivors and in 2006 accepted \$73,414.00 in grants from the Conference on Jewish Material Claims Against Germany, Inc. to aid survivor clients.

The only area of programming that did not grow and evolve was the Utility Workshop. The program was unable to recover after September 11, 2001, as local businesses began to contract their work out to other countries. Consultants assessed the program and developed plans to generate new contracts. In 2005 JFCS launched Cleanerific, a home and commercial cleaning company that provided employment and benefits for underserved segments of the community.

The agency also established a Community Leadership Institute to identify, educate, and involve prospective lay leaders to guide 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 received funding to develop an internal JFCS Management Training Fellowship Program to ensure continued excellence and innovative leadership.

JFCS continued its political activism and in 2004 successfully campaigned for Proposition 63 that increased state funding for previously unfunded programs and 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 advocate for issues that concerned the population JFCS was serving and lobby for increased funding.

In 2006 the Board introduced a new three-year strategic plan (2006–2009). The plan calls for raising the profile of the agency through an updated marketing plan, expanding services for youth and seniors, as well as mental health, spiritual care services, increased fundraising, and quality assurance. The Endowment Committee continues to work on the goal of \$35 million.

CONCLUSION

JFCS of San Francisco, the Peninsula, Marin, and Sonoma County is a \$30 million nonprofit human service agency delivering a multitude of services to 58,000 people living in the Bay Area. The organization has a rich 157-year history and has grown as the field of human services has expanded over the past several decades. The unprecedented growth has occurred at a time when

other nonprofits have struggled to maintain financing to support service delivery. As a pioneering human service organization, JFCS expanded to four counties outside of San Francisco, established several nationally recognized programs and achieved a new level of financial independence and self-sufficiency. Several themes help to explain the success of the organization.

Community Building and Programming

Although JFCS delivers programming to people of Jewish and non-Jewish faiths, it is inherently a Jewish organization and is built upon traditional Jewish values of giving back to the community. The organization emphasizes inter-generational ties, Jewish history and continuity, and community responsibility. Several employees and Board members note that their involvement with JFCS offers them a connection to their Jewish religion, culture, and community. Others express pride in their association with an organization that has a long history of serving the Jewish community and continues to grow while still meeting a diverse set of community needs.

A unique aspect of JFCS is that they assess the needs of the Jewish community and respond through developing programming to meet these needs. The organization has a long history of initiating programs to meet needs identified by staff-led community assessments and through client voices. For example, Adoption Connection emerged as a result of a JFCS initiated assessment that found a gap in services for parents interested in private adoptions. JFCS also evaluates their programs and publishes the results.

Funding Diversification

An important factor that contributed to the long-term success of JFCS is that the organization's leaders paid attention to what was happening within the social, political, and economic environment of the 1980s. Not only were organizations serving the Jewish community experiencing reductions in their federal and state contracts, but they were also experiencing cuts in their Jewish Community Federation and United Way contributions.

Although funding diversification was not an uncommon response, the organization recognized the need early and quickly put into place strategies to help them adapt to the changing external environment. JFCS made many changes over the past several decades that include: (a) reorganizing financial policies and procedures, (b) identifying and executing plans to generate new sources of revenue, (c) hiring grant writing, publicity, and fundraising staff, (d) developing a fundraising plan, (e) initiating an annual gala to both raise funds and the visibility of the organization, (f) purchasing properties, (g) revising fee schedules, and (h) developing social enterprise businesses.

There are several factors that contributed to the success of JFCS. First, the organization took action early by developing and adhering to a strategic plan. Second, JFCS leaders recognized that they needed to institute their own fundraising plan and set about hiring staff and forming committees to do so. Third, San Francisco had a vibrant and thriving Jewish philanthropic community that enabled JFCS to attract and pursue foundation funding and donations. Fourth, the organization did not shy away from charging fees for services. And fifth, the Board made courageous decisions to support social enterprise ventures, including the establishment of Help-at-Home and Cleanerific.

Lay and Professional Leadership

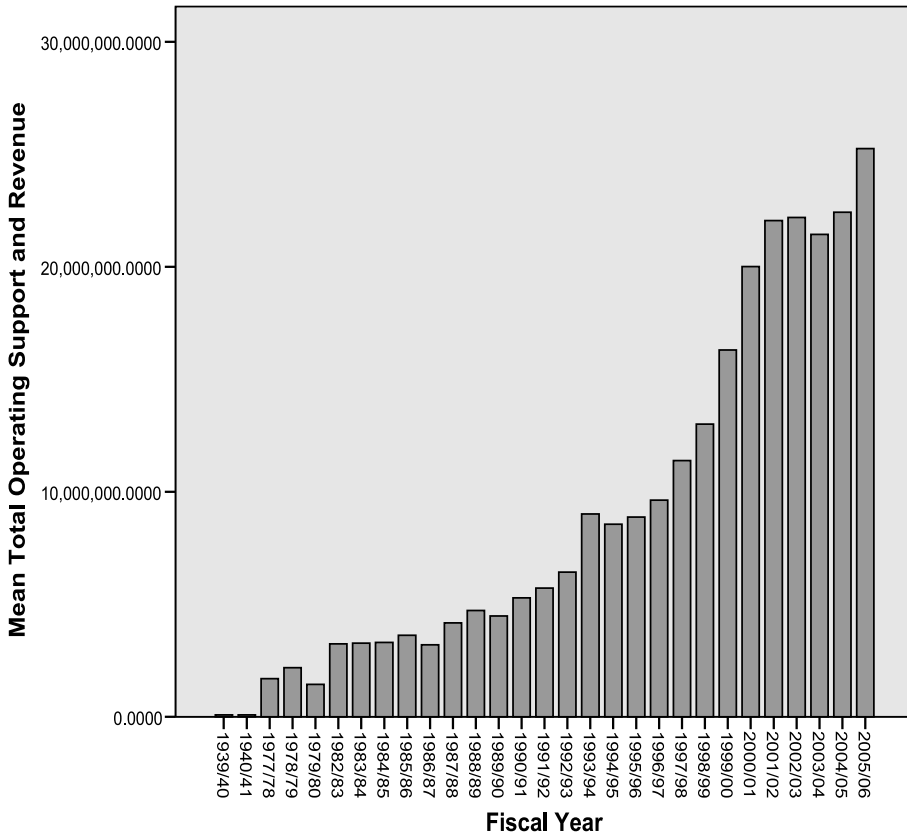
One of Anita's initial strategies when she was promoted to executive director was to develop the Board and engage them in all aspects of governance and agency oversight. This process took several years but was successful in building a diversified Board that is involved in governance. While the 30 board members are all Jewish, they reflect diversity in religious affiliation, residential location, political orientation, education, economic status, and areas of expertise.

Because of its large size, much of the organizational decision-making occurs in smaller committees. JFCS has a number of committees and subcommittees focus on specific issues and make recommendations to the entire Board during its monthly meetings. This process works smoothly and most members are actively engaged in several committees or subcommittees.

In 1985 the Board recognized its challenges and searched for new ways to lead a nonprofit organization into the 21st century. The Board came to the conclusion that the current executive director did not have the leadership qualities needed to help the organization survive the turbulence of the decade and made the difficult decision to replace him with Anita Friedman. This decision helped to transform the organization in a significant way. The leadership qualities of an executive director that are important to JFCS include commitment, management skills, recognition of the organization within its larger environmental context, vision, decision making skills, and the ability to manage change.

Leadership at JFCS is also attributed to the executive director and Board's decisions to hire and promote employees into positions to help them achieve organizational change goals. Many of those interviewed reflected that the organization's success is largely due to a strong executive team and talented workforce as well as the leadership position that JFCS has taken in the community. Political connections, both local and national, have also helped the organization successfully advocate on behalf of the clients they serve in the Jewish community.

APPENDIX A: JFCS FINANCIAL TREND LINE



APPENDIX B: SOURCES OF INFORMATION

Interviews

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

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