

## Introduction

On behalf of the Board of Directors and management of the Association of Jewish Aging Services, it is my pleasure to introduce the strategic planning document contained in the following pages. Charged by the AJAS Board to prepare a strategic plan, the Planning Task Group held three meetings and numerous regional and nationwide telephone conferences over the course of one year. Their dedication and hard work are deeply appreciated.

The Group evaluated the organization's strengths and weaknesses in relation to today's dynamic operating environment. Based on this analysis, AJAS revised its mission statement, developed five vision statements and two strategic focal areas with related strategies, goals and objectives. The strategies respond to the mission and vision statements. The Task Group concluded that the Association is essentially in good health and should focus its efforts over the next three to five years on two areas:

- 1) maintaining its relevance to member organizations by being responsive to member needs, being a center for professional development, and being relevant in the arena of public policy; and
- 2) maintaining its organizational health by building on areas of strength, maintaining Board effectiveness, and developing depth of AJAS leadership.

This document is merely a tool to help AJAS perform its mission of promoting and supporting the delivery of services to an aging population within the context of Jewish values and ethics. Its effectiveness as a tool depends on a commitment of the AJAS leadership, staff and membership to implement its goals and objectives. This is presented as a five year plan, adopted in 2007 and culminating in 2012. It is not meant to be a work plan to be completed over the next year, but rather to be implemented over a five-year period. The plan should be considered a “living document” to be reviewed annually by a task force of the Board. It is recommended that the next intensive planning take place in three years, to be adopted in four or five years.

Molly Forrest, Planning Task Group Chair  
Association of Jewish Aging Services  
September, 2006

## **Mission Statement**

AJAS is a unique association of not-for-profit community-based organizations, rooted in Jewish values, which promotes and supports the delivery of services to an aging population.

## Vision Statements and Guiding Principles

**STATEMENT 1:** AJAS will be the premier resource for the unique Jewish perspective on aging services and issues related to it.

AJAS will focus on Jewish aging issues and support membership in maintaining its traditional mission of serving the elderly with quality care, informed by Jewish values and ethics. It also will be seen as an important and expert voice on relevant national committees and forums.

**STATEMENT 2:** AJAS will continue to be a "niche" association for Jewish aging services and will not try to compete with larger national associations.

AJAS will continually strive to articulate a clearly defined target audience and core offerings. It will differentiate itself from larger associations by offering relevant, valuable services to its membership, not available through the national aging services associations.

**STATEMENT 3:** AJAS will be an initiator and facilitator of collaboration and partnership within its membership and beyond.

AJAS will serve as a friendly and supportive Jewish forum and resource providing opportunities for sharing information and expertise, dialogue and debate through conferences and electronic communication. The AJAS CEO will participate in meetings and conferences of other Jewish and aging organizations not only to represent the public policy stands of AJAS but also to develop and strengthen alliances and partnerships with such organizations.

**STATEMENT 4:** AJAS will promote the development of future Jewish leadership within the field of aging.

AJAS will promote the development of management leadership through educational programming and supporting mentoring relationships. AJAS will promote board leadership development by encouraging board members from member organizations to attend local regional and national conferences.

**STATEMENT 5:** AJAS will maintain a position of advocacy within the public policy domain of North America.

AJAS will develop well articulated positions on senior services enabling the AJAS leadership to be the voice of the AJAS membership / community on a national level. To accomplish this, the CEO will know the pulse of the Jewish community through such means as attending regional conferences and periodic telephone calls with member leadership. The CEO will organize membership voices in a manner representative of this community.

The AJAS CEO will represent the membership community at national forums by participating in conferences, meetings and discussions with such organizations as the United Jewish Communities (UJC), American Association of Retired Persons (AARP), and the American Association of Homes and Services for the Aging (AAHSA).

AJAS will encourage its membership to actively participate in the national public policy forum. It will do this by disseminating information from the national level back to the regional level and by encouraging AJAS membership to promote their interests at a regional and national level.

## **Relevance Strategies, Goals and Objectives**

### **STRATEGIC FOCAL AREA: Relevance to Member Organizations**

AJAS must continue to be a dynamic, flexible organization, relevant to its membership.

#### **STRATEGY: Be Responsive to Member Needs**

AJAS will offer programs and services responsive to the needs of its membership.

##### **GOAL: Assess Needs**

Conduct on-going assessment of membership needs and respond to those needs.

##### **OBJECTIVE: Survey Membership**

to identify the needs / interests of specific segments of the membership. At least one survey per year should be conducted.

**OBJECTIVE: Determine the Segment of Membership to Target** for survey. The Program Committee of the Annual Conference determines whether to survey CEO, COO, CFO, fund development, lay leadership and/or other departments. Surveys will be sent through CEOs, encouraging them to share with relevant individuals / departments. The survey target(s) should be determined during the first meeting of the Annual Conference Program Committee.

**OBJECTIVE: Present Annual Plan to AJAS Membership** addressing interests identified in the survey. The AJAS CEO should summarize the needs / interests of membership, develop a plan to address those interests, and present it at the annual business meeting.

#### **STRATEGY: Be a Center for Professional Development.**

AJAS will be a center for education, discussion and networking.

##### **GOAL: Be an Educational Resource.**

Serve as an educational resource for its constituency.

##### **OBJECTIVE: Access Membership Expertise**

as a pool of resources on senior aging services. Membership involvement in annual conferences, regional forums and the listserv are indicators of success in this area.

**OBJECTIVE:** Explore Mentoring and Leadership development amongst membership organizations and within the Association. AJAS' CEO will create a plan that promotes mentoring and leadership development.

**OBJECTIVE:** Provide Members with Educational Resources related to Jewish programs and values within the context of aging services. Create a resource directory referencing AJAS library resources and articles, and knowledge base of membership organizations as presented in listserv discussions and articles.

**GOAL: Provide Discussion and Networking Opportunities** through conferences and technology.

**OBJECTIVE:** Provide the Annual Conference including discussions on challenges facing member organizations. Maintain attendance at the conference.

**OBJECTIVE:** Provide Regional Conferences and Webinars to strengthen networks and idea exchange. Provide at least three regional conferences / forums and two webinars per year along with continued use of the listserv.

**STRATEGY: Be Relevant in the Public Policy Arena.**

AJAS will make itself relevant in the public policy arena as the voice on Jewish eldercare issues.

**GOAL: Specialize in Jewish Ethics and Care.**

Specialize in specific areas of Jewish ethics and professional care of the aging.

**OBJECTIVE:** Develop Well Articulated Positions on Senior Services enabling AJAS CEO to represent the voice of the AJAS membership / community on a national level. Participate in meetings with Leadership Council of Aging Organization (LCAO), AARP, AAHSA, UJC, Association of Jewish Family and Children Services (AJFC).

**OBJECTIVE:** Identify National Themes of Interest of AJAS members and develop conferences focused on those issues. This will enable leadership to be better advocates for those issues and concerns.

## **Organizational Health Strategies, Goals and Objectives**

### **STRATEGIC FOCAL AREA: Organizational Health**

AJAS must continue to improve its organizational health.

#### **STRATEGY: Build on Areas of Strength**

AJAS will not attempt to be everything to everyone but rather will build on areas of strength and opportunity

#### **GOAL: Reach Out to Members**

##### **OBJECTIVE: Reach out to new members.**

Continue welcoming first time attendees at the annual conference with an AJAS' CEO hosted dinner. Develop additional formats for reaching first time attendees at the annual conference, in the Scribe Newsletter and Updates.

##### **OBJECTIVE: Reach out to lay leaders and senior management.**

Working with the Annual Conference Planning Committee, offer more than one session at the annual conference focusing on lay leadership and senior management.

#### **GOAL: Maintain Vendor and Sponsor Participation**

##### **OBJECTIVE: Maintain vendor participation in conferences.**

Have at least 35 vendors participate in the annual conference. Ensure one regional conference per year has vendor participation.

##### **OBJECTIVE: Maintain sponsor participation in conferences.**

Twenty to twenty-five percent of conference revenue should come from sponsors. Avoid over-reliance on any one sponsor which could be devastating should that sponsor ever pull-out. At the same time, practice controlled growth of sponsorship, avoiding too many sponsors in any one category (for example, food distributors) since that would diminish the value of the sponsorship for the sponsoring company by making it less exclusive. Maintain sponsorship at a level of not less than 18 sponsors.

##### **OBJECTIVE: Increase financial contribution from sponsors.**

Define sponsorship levels such that each higher level confers greater visibility amongst the membership. For example, for \$10,000 a company could sponsor, introduce and perhaps participate in an appropriate educational session at the annual

conference with prior approval of the Conference Planning Committee.

**GOAL: Maintain AJAS Membership at its Current Level.**

It should be noted that AJAS currently has as its membership, the overwhelming majority of not-for-profit Jewish organizations with eldercare facilities and services in North America.

**OBJECTIVE: Enhance value through periodic contact.**

Enhance the perceived value of membership through at least two telephone conversations per year with the CEO of each member organization. Maintain the listserv, webinars, and other services unique to AJAS.

**GOAL: Attract Organizations Outside of North America.**

Provide value to Jewish senior service organizations outside of North America.

**OBJECTIVE: Develop affiliate status.**

Allow access to on-line resources (database, web conferences, etc.) for a programmatic fee. The AJAS CEO should develop a plan for affiliate relationships for other Jewish aging service organizations outside of North America. The plan should be presented to the Board for approval as part of the annual budget presentation.

**STRATEGY: Maintain Board Effectiveness and Develop Depth of AJAS Leadership.**

**GOAL: Keep Board Involved in Strategic Use of Resources**

**OBJECTIVE: Ensure Board participates in long-term planning** by appointing a Board task force to review the strategic plan annually. Intensive planning should occur every three years, culminating in a five-year plan.

**OBJECTIVE: Maintain Board's involvement in strategic use of resources.**

In collaboration with the AJAS CEO, the Board should set an expectation of net revenue from the annual conference. The goal should be to balance the need for revenue with the need for addressing critical issues such as the membership's request for higher quality, and thus more expensive speakers at the annual conference. The Annual Conference Planning Committee shall work within the budget.

**GOAL: Develop Succession Planning**  
for leadership roles in AJAS.

**OBJECTIVE:** Develop AJAS leadership tracks.

Create tracks for involved members to help them reach positions of responsibility in the organization. The Governance Committee should create a task force to focus on governance leadership within the organization. This task force should develop leadership tracks and identify potential leaders.

## Appendix

### SWOT Analysis (Strengths, Weaknesses, Opportunities and Threats )

The following is an unedited version of the SWOT analysis conducted by the Planning Task Group during several “free-form” discussions designed to elicit the opinions and perspectives of the individuals comprising the Group. As such, some categories contain contradictory ideas representing varying viewpoints. It was the starting point for the planning sessions. The actual plan, consisting of the mission and vision statements, and the strategic focal areas, was unanimously adopted by the Task Group and thereby represents its collective view on the strategic direction upon which AJAS should embark.

#### Strengths

##### 1. Friendly and Supportive Jewish forum

- Great networking
- “Hamishe”
- Collegiality
- Connections
- Advice
- Shared ideas
- Place to discuss relevant industry issues within a Jewish context
- Great place to make contacts and share information
- Share common issues and needs
- Share common goals and objectives (moved from opportunities to strengths)
- Source of learning from different communities; ability to provide consistent and personal networking between staff across the country; sharing info between members
- Sharing of information/questions/listserv
- Solidarity
- Taking more of grassroots/regional approach

##### 2. Supports professional development of its membership

- CEO and Board support
- Improving educational programming
- Improved organizational leadership
- Conferences
- Regional conferences

##### 3. Unique focus on Jewish aging issues

- Community minded
- Advocacy issues

- Quick to respond to issues
- No direct competition – monopoly on Jewish non-profit institutionally based care

#### 4. Membership shares common values and is a pool of expertise

- Strong traditional mission, Jewishly informed values driving ethical and quality care
- High reputation of membership
- Finest care communities in North America.
- History of outstanding professional leadership
- Jewishly informed values driving ethical care and caring.
- AJAS staff
- Focus on care and Jewish issues
- Quality of Leadership
- Commitment to quality care
- Commitment to Jewishness
- Members' areas of expertise such as the development, operations and financing of facility (SNFs, RCFEs, etc.) and community (hospice, home health, PACE, etc.) based services.

#### 5. Serves both senior management and lay leadership

- Engaged and energized lay leadership, with a history of engagement, and several new and younger members taking positions of responsibility in the organization.
- Engaged and energized lay leadership.
- Broad leadership
- CEO involvement
- Strong vendor relationships (moved from opportunities to strengths)
- My Ziva

### **Weaknesses**

#### 1. Diverse membership makes it difficult to be relevant to all members

- Some very diverse organizations that find it difficult to relate
- Different missions
- Lack of relevance between different size organizations, cities and communities
- Diverse needs of AJAS members
- Less relevance to larger N.E. programs that have transitioned to non-institutional delivery of services.
- Failure to follow traditional AJAS mission – leading to some fragmentation of purpose.
- Diverse membership – both in scope, size and geographic spread
- Interest from smaller facilities vs. larger, more experienced
- Parochial bias in problem-solving

## 2. Relatively small size of membership makes AJAS less effective in some areas

- Too small a lobby group
- Little impact on legislation on either a regional or national level – AJAS is perceived as a valued but minor player.
- Always same people
- Can't compete with AAHSA
- Legislative influence
- Influence at CHA

## 3. Cost of membership is a burden to some organizations

- Increasing costs for facilities to attend programming
- Cost (esp. to small market facilities, community based programs)
- Matter of comfort vs. value for money

## 4. Jewish communities becoming less engaged in Jewish sponsored aging services

- Limited number of participants
- Declining Jewish communities
- Lack of mission driven executives coming into the field – the pipeline is virtually dry.
- Limited participation of membership

## 5. Open forum can lead to misinformation

- Not repeating bad data base / responses to members

## **Opportunities**

### 1. Strong Jewish niche market

- Aging Jewish Population -
- Increased ability for consumers to pay for superior services
- More sophisticated consumers – *Threat and Opportunity*
- Reaching out to Israel and larger Jewish world
- Intergenerational transfers will continue to increase. It seems to be apparent that customers are likely to spend their money on themselves, and are not dedicated to saving for their children.
- Increased demand with changing demographics

### 2. Jewish organizations perceived to provide quality care

- Public perception of quality care
- 'Jewish' is perception of quality

### 3. Worldwide need for expertise in aging services

- AJAS member expertise
- International opportunities
- Expand reach of AJAS beyond North America – to Jewish aging organizations in the rest of the world
- Take an active part and present at the 2006 International Quadrennial Conference in Jerusalem.
- Provide speaker with aging expertise, on behalf of AJAS
- Become “the resource” on Jewish Aging internationally
- Find our niche to offer unique programming
- Sharing best practices
- To help understand Jewish demographics
- To help how to offer cost effective community based services
- UJC prioritization of Jewish Communities as needing priority attention.
- Find ways to find relevancy for the diversity of our members
- Widening marketing to organizations that are not institutionally based – but this might require a different approach than to the traditional NH based campuses, and the ability to provide relevant services to these new customer w/o losing or diluting the original message.
- consulting services to be offered by AJAS members
- Training / internship programs to attract young Jewish professionals into the field of aging services.

#### 4. Opportunities resulting from barriers to providing aging services

- Nursing Shortage – *Threat and Opportunity*

#### 5. Opportunities resulting from strength in numbers

- Partner with other faith based groups
- Learn from each others best practices and not repeat the same mistakes
- Having an advocate for Jewish elderly acting on your behalf
- Strong vendor relationships (moved from opportunities to strengths)
- Shared services – such as satisfaction surveys, insurance products, MYZIVA, etc. New business products and shared marketing
- Overarching organizational control – similar to multi unit church based organizations that utilize their commonalities to create market power and organizational standards and expertise.
- My Ziva is free resource
- Expand to include private and for profit facilities
- Modern technology

#### 6. Technology allows for more efficient communication

- Increased penetration into membership organizations by utilizing computer and phone technology to share information with several employees of member corporations.

## Threats

### 1. Hostile external environment for membership organizations

#### **Decreasing Revenue and Sources**

- Revenues, Philanthropy, Reimbursement
- Communal apathy
- Budget cuts forcing “professional” extras like AJAS membership
- Financing
- Difficult to find new sources of revenue to support the operations of AJAS
- Need to define future revenue streams
- Reimbursement cuts have diminished flexibility and power of membership institution, and decrease in private pay and charitable donations have increased dependency on government payers, leading to financial weakness amongst membership.
- Bad debt
- Insufficient reimbursement
- Federal & State budget
- Be flexible for shifting reimbursement (moved from opportunities to threats)

#### **More demanding clientele and staffing**

- Sense of communal entitlement
- Nursing Shortage – *Threat and Opportunity*
- More sophisticated consumers – *Threat and Opportunity*
- Reduction of available work force
- Transitory nature of clients and staff
- Members finding the time to commit to AJAS
- Nursing shortage
- Unions
- Consumer perception of nursing homes
- Ensuring value for dollars

#### **Increased competition**

- Increased competition (other associations)
- Competition from AAHSA and other organizations
- Private sector
- Private vs. public
- An industry under pressure with additional threat to Jewish identified facilities (moved from weakness to threat)
- Competition to AJAS for community based programs (moved from weakness to threat)
- Increased competition to the institutional center of many AJAS members due to ALFs, insurance costs, local migration out of city centers, and other market place dynamics. (moved from weakness to threat)

- Competition from other groups
- Acute rehabilitation
- Increased choice for consumers (moved from opportunities to threats)
- Lack of clarity of what it means to be a Jewish service organization

### **Hostile Business and Regulatory Environment**

- Government, bureaucratic and regulatory involvement in the field is a barrier to innovation and has led to stagnation. Litigation has also led to a very conservative management ethos, based on a risk averse perception of the present and future environments.
- Changing public policy environment
- Maintaining Jewish environment in face of growing first amendment rights
- Insurance
- Tort reform
- Olmstead Act

## 2. Increasing challenge to serve heterogeneous Jewish populations and membership

- Diversity of Jewish Population
- Intermarriage
- Conflicting priorities
- Tangible member benefits
- Small number of staff to manage diversity of member needs and interests
- Trying to be all things to all people [who is our audience]
- Focus on Jewish long-term care homes

## 3. Few potential member organizations and participants

- Downsizing and merging of Jewish member organizations
- Lack of younger participants and still CEO oriented
- Limited attendance at meetings
- Shortage of Jewish professionals
- Jewish Leadership

## 4. Small size of AJAS threatens its effectiveness

- Not enough staff to advocate and lobby on critical issues
- Lack of policy relevance vis-à-vis larger and more powerful groupings – such as AAHSA, or parallel State organizations.
- Impact of lobbying [lack of value for non-USA facilities]; lobbying versus
- Cost of belonging to AJAS
- Cost vs. Value evaluation of AJAS representation and services (but if membership perceives value, payment is not typically an issue).