

AGENCY INTEGRATION AND THE COMMUNITY EFFICIENCIES GROUP

Phase One of the Cincinnati project includes a co-location of the Jewish Federation of Cincinnati (Federation), the Jewish Community Center (JCC) and the Jewish Family Service (JFS), and the integration of the Jewish Big Brothers/Big Sisters as a part of Jewish Family Service on The Jewish Foundation of Cincinnati Campus (Campus). Phase Two includes the potential restructuring and integration of the staff and services of these co-located agencies, as well as potential co-locations and changes in other agencies and organizations.

The motivation for Phase One is both financial and service-based. Both the JCC and the JFS are operating at deficits and the JFS has been renting a less than optimal space from a landlord. The relocation of JFS will help close the deficits of both agencies by reducing the operating costs of the JFS and sharing the operating costs of the JCC. It will also enable the community to offer a broader range of services in one place and create “one-stop shopping” for community members who want these services. The Federation offices are already located on the Campus.

SETTING THE STAGE

Monthly meetings of agency executives and the CEO and COO of the Federation have been held for the past four to five years. The purpose of these meetings has been to address mutual issues and concerns and to build increasing trust. One outcome of these meetings is a Statement of Mutual Commitment developed collaboratively and approved by all the agency boards. In addition, meetings of new executives (and others who wished to participate) were also held with the Federation COO for about a year to address special issues that were not meaningful to all executives. In response to the stated needs of the agencies, the Federation added a line item in its budget to fund professional development opportunities for the management staff of the agencies.

When Cincinnati’s 2008 Community Study was in the field, the conversations at the Agency Executives’ meetings focused on a community-wide coordinated response to the learnings from the data. Similar conversations about responding to the Community Study were taking place at the same time with congregational rabbis. Beginning in February 2008, the Federation began meeting with agency execs and pulpit rabbis together to develop a community-wide response to the Community Study data. Those meetings had been taking place monthly, and had led to a significant level of trust among the participants, when the economic crisis hit.

ACTION STEPS

In March, 2009, the Federation created a Community Efficiencies Group made up of 18 community-wide representatives with special skills. The Group was chaired by a member of the Federation Executive Committee and a Past President. At least one person who was knowledgeable about each of the key agencies was included.

This Group created 12 Work Teams to explore identified short-term and long-term strategies for maintaining a dynamic Jewish community in the most efficient manner possible. The Teams were lead by members of the Group and included additional community members with expertise in the areas being explored. (See attachment with Work Team descriptions and progress as of March, 2010.)

The co-chairs of the Group held a meeting with all agency executives and their presidents and management staff. They reported to them on the objectives of the Group and the Teams and they answered questions. They also invited them to identify any potential efficiency areas that had been overlooked by the Group, to offer the names of lay or professional people that could be helpful on the existing Teams, and to indicate what efficiency areas would be their top priorities. The co-chairs then had a similar meeting with pulpit rabbis, congregation administrators and their presidents.

At the same time, the lead staff of the three co-locating agencies, Federation, JCC and JFS began to meet. These meetings were facilitated by a consultant that had worked with Federation staff for several years. This group developed a vision about the possibility of offering a one-stop shopping opportunity for social services in the Jewish community and described how that social service center would need to look. The excitement generated by these possibilities created a desire to take the first step of this process and implement the co-location.

The co-location decision was supported by a recommendation from the Space and Operations Team. This Team distributed to agencies, congregations and organizations a spreadsheet designed to capture data regarding each organization's lease or own status, mortgage information, size of currently occupied space, number of employees, size and nature of required space, importance of location, available unused space, and all annual occupancy costs.

From the submitted data, the Team identified those organizations that are leasing and interested in relocating. The largest renter by far was JFS and, as a critical agency that serves the entire community, they became the priority consideration. The Team identified three centrally located spaces within Jewish community organizations that could potentially house JFS. They then did walk-throughs of those three spaces, as well as the current JFS space.

The Team then made a recommendation to the Group based on the following observations: The JCC would be able to accommodate most of the staff of JFS in the empty offices and work stations in the JCC and Federation administrative offices on the upper level. This could be done for a relatively small investment to redesign the computer network and communications server. There was room that could be retrofitted for private counseling space for an additional cost. There is also adequate room for secured JFS files and the JFS' Adoption Connection program. The greatest advantage of JFS moving to the JCC is the large number of synergies that exist between these two agencies that would enable them to provide more comprehensive and coordinated services to the community.

NEGOTIATION

The negotiation efforts took place on two tracks, lay and professional. The chairs of the Community Efficiencies Group went to the Executive Committees and Boards of both the JFS and JCC to talk about the co-location. Both agencies' leadership supported the idea.

At the same time, the JFS and JCC Executives and the Federation COO were meeting to develop the details of the physical plan and the preparation of the staff to deal with the changes in the offices.

Issues of Governance have not been addressed and may not be part of the long-term vision. Staffing Issues and Integration of Programs and Services will be part of Phase Two. The Amount of Cost Savings and the impact on fundraising are not yet known.

1. The greatest success was moving to agreement on the co-location at a relatively fast pace and, at the same time, engaging a large number of volunteers in the decision-making process. The factors of this success were the level of trust that had been established between the Federation and the agencies over the previous four to five years and the exceptional community-minded perspectives of the JFS and JCC executives. The financial stresses were obviously another factor.
2. There were three significant challenges. **The first** was the integration of the lay and professional tracks. This was addressed through frequent communication about actions and progress. **The second** was the timing of the engagement of the key stakeholders. This was handled by identifying all possible stakeholders and planning a timeline and method of informing and engaging each one.

The third and greatest challenge was achieving a balance between the implementation of projects that benefited from immediate action (moving JFS to the Campus) and maintaining the flexibility to be able to respond to a broader long-term community vision that had yet to be developed. The decision was made to separate the move of JFS from the potential staff integrations and collaborations that were anticipated.

Attachment A
Community Efficiencies Group
Summary of Impact to Date
March 1, 2010

FAST-TRACK TEAMS

I. Space & Operations Team

- A. The Center for Holocaust and Humanity Education (CHHE) has moved into the Rockwern Academy building.
- B. The Jewish community artifacts collected and restored by Hillel have been sold and moved to a display area in the Rockwern Academy building as a complement to the Holocaust Center's "Mapping Our Tears" exhibit.
- C. BB/BS has agreed to integrate into JFS and is close to working out their final status in this integration.
- D. The plan for the JFS move to the JCC has been presented and unanimously approved by all three agencies' boards.
 - 1. A project management team has been engaged.
 - 2. An implementation team with staff from all three agencies has been formed and is meeting weekly.
- E. Nine agencies and congregations have signed up for electric contracts with a potential community-wide savings of over \$200,000.
- F. Four agencies and congregations have signed up for gas contracts for a guaranteed savings of 14.5%.

II. PEO (Professional Employee Organization) Team

- A. The Team decided that, given the lack of a critical mass in the number of potentially participating staff, the PEO option is not feasible as an answer to the health insurance challenge.
- B. At the recommendation of the PEO Team, the Life and Long-term Disability Insurance for the Federation and six agencies and congregations was bid out for a projected 20% cost reduction of \$19,000.
- C. Also at the recommendation of this Team, an HR consultant made a presentation to Agency Executives for an HR Check-up and possible out-sourcing of services at a discounted rate.

III. Day Schools Collaboration Team

- A. After thorough investigation, this Team determined that: 1. there are no opportunities at this time for shared efficiencies through shared staff, and 2. there is inadequate space to house both schools at the Rockwern facility and no significant cost savings by doing so.
- B. Collaborating on extracurricular activities like sports teams and math teams was identified as a possible community-building opportunity.

IV. Liability Insurance Team

- A. The Federation engaged a consulting firm, MDN Consults, to work with the community over the next three years. They are in the process of conducting a complete risk assessment of all the participants in the liability insurance that covers most of our community agencies and congregations.
- B. The risk assessment will be followed by the development of an RFP that reflects the identified risks. This will be sent to several brokers, with an expected three or four bid responses.
- C. The results of this bid process will be implemented at the start of 2011.
- D. In subsequent years, MDN Consults will negotiate annually with the broker for the continued coverage.

V. Shared Purchasing Team

- A. All agencies and congregations were invited to attend a special information session about the Consorta group purchasing program for new or interested members on November 19, 2009 at the Health Foundation.
- B. The potential for savings in purchasing kosher meat is still being explored.

VI. Camps Team

- A. The JCC, Camp Ashreinu and Camp Livingston professionals met to share information and explore potential collaborations.
- B. JCC offered Camp Ashreinu a list of JCCA preferred vendors so they can receive discounts.
- C. Livingston offered Ashreinu the use of Camp Livingston grounds on the off-season for their CIT training.

MEDIUM-TERM TEAMS

VII. Shared Staffing Services

- A. A shared Technology plan has been developed for the JCC, JFS and Federation. The plan has been bid out and the bids are being reviewed.
- B. A plan to combine the Finance, IT and HR Departments of the JFC, JCC and JFS is being researched, developed and budgeted with the help of an international professional team from The Nielsen Company that is assisting this project pro bono.
- C. Collaborative Marketing/Communications/PR has been explored enough to understand the challenge of this type of collaboration among agencies that share a vision but have very different missions.

VIII. Pre-Schools Collaboration Team

- A. This Team had several discussions about the ways in which the Rockwern and JCC Early Childhood programs differed and the different goals of the two agencies in having these programs.

- B. Recommended initial collaborations included running joint ads, doing joint teacher training, sharing sports leagues, and jointly pitching Mayerson Foundation to get access to the Shalom Baby lists.

IX. Banking Team

- A. A banking team is being formed to coordinate a list of overall objectives: maximize leverage of banking relationships, safeguard funds, maximize earnings, minimize fees, ensure line-of-credit availability, enable debt funding, and minimize administrative burden.
- B. Discussions have been held with Chase and PNC about the benefits of consolidating banking services.

X. Collaborative Fundraising Team

- A. Agency representatives are serving on the Annual Community Campaign team.
- B. When JFS is located at the JCC, there will be sharing of the services of the JFS grant writer.
- C. The JCC has hired a development professional who will report to and get guidance from the Federation's Development Director.

LONG-RANGE TEAMS

XI. Structures Team

- A. Team members have debriefed individuals in several communities that have changed their structures in different ways.
- B. The team decided to select the elements of other communities' structures that worked for Cincinnati and asked the agency pros on the Team to develop an outline. The document they produced is attached.

XII. Mission/Outreach Team

This team is continuing to develop their strategy on how to engage a broader group of people in shaping and participating in the Jewish community.