

A NEW VISION  
FOR THE FUTURE



JEWISH  
HOME

SAN FRANCISCO

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## EXECUTIVE SUMMARY

In early 2004, leadership of the Jewish Home of San Francisco launched a collaborative and community-wide strategic visioning initiative. This process was undertaken in order to:

- Assess the changing needs of the Bay Area's older adults and the Home's capacity to better serve those needs.
- Examine how and where the Home delivers programs and services, and its ability to refine, improve and redefine those services.
- Consider ways to alter the methods and locations in which the Home delivers programs and services in the future, so as to serve a broader constituency of older adults – as well as new and emerging markets – who are looking for different types of senior living environments.
- Review and update the organization's vision and strategic plan to ensure that the Home remains responsive and relevant as a provider in a rapidly changing network of services for older adults in our community.

When we began developing a new strategic plan, it was with more of a specific focus on how the Jewish Home of San Francisco would deliver services to senior adults in the future. However, in response to what we have heard and learned during this process, it has become clear that the vision we are endeavoring to shape extends beyond our San Francisco (Silver Avenue) campus. Some of the trends affecting our understanding include, but are not limited to:

- Aging is the largest, most powerful socio-demographic facing the world today.
- Today's social institutions are unable to handle the deluge of demands for health services. The current health systems must convert from an acute to a chronic system to meet the needs and demands of the future.
- Governments at different levels have neither the resources nor the commitment to our aging population necessary to effectively address these challenges.
- There is an opportunity and an expectation – even an obligation – for the Jewish community to meet this need.

The Jewish Community Federation of San Francisco, the Peninsula, Marin and Sonoma Counties completed a demographic study in 2004<sup>1</sup> that highlighted the following key developments over the past 18 years:

- There has been a doubling of the age 65-plus population in the United States (from 17 million to 33 million).
- There has been a 50 percent increase in the 45-54 age group in the Bay Area, whose parents are in the 70-90 age category. These 70-90 year olds may become future Bay Area residents, who require age-appropriate housing and services closer to their adult children.
- The four highest priorities in terms of unmet needs among this 70-90 age group are: 1) transportation; 2) Jewish programming; 3) home care; 4) assisted living.
- The rationale for addressing these unmet needs by congregating people and services; in other words, physical proximity.

The national and local trend lines for aging services in both the Bay Area and the Jewish community create possibilities, but also the need to realign Jewish aging services. We recognize the necessity for developing a vision that can be used to set policy – and thus management – in the right strategic direction to address future needs.

In addition, we will be refining the Jewish Home’s master site plan that will allow us to realign the Home’s national reputation for quality and innovation, as established by our predecessors, into modern centers of excellence that both meet and better serve the current needs of older adults seeking our services, as well as accommodate new markets. The Jewish Home is our flagship, and the emotional and cultural epicenter of our aging initiatives.

1. *“Connecting our Jewish Community” – 2004 Jewish Community Study of San Francisco, the Peninsula, Marin and Sonoma Counties.* Jewish Community Federation of San Francisco, the Peninsula, Marin and Sonoma Counties, August 2005.





## BACKGROUND

For 136 years, the Jewish Home of San Francisco – a non-profit, licensed skilled nursing facility and residential care community – has ensured that Bay Area elderly have always had a place to call ‘home.’ From our modest beginnings in 1871, we have diversified to providing services for many different populations with multiple and unique care and service needs. Today, our nine-acre campus with its five distinct buildings serves over 430 residents.

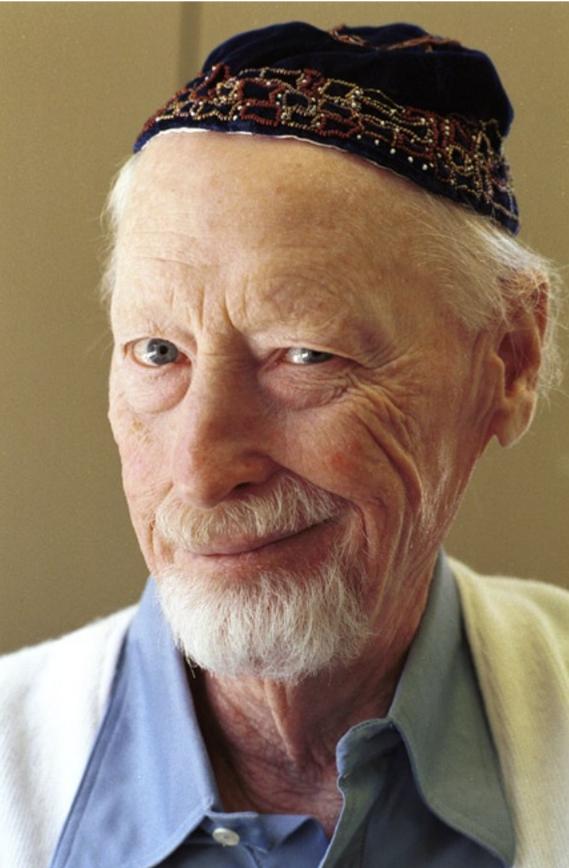
Historically, residents and their families and friends have chosen the Jewish Home because of the high quality and comprehensive care it offers. Its unique and welcoming environment, combined with excellent services delivered by compassionate, experienced clinical and allied health personnel, have made it a national model for geriatric care.

## SHAPING OUR VISION

Shaping the Jewish Home's vision and planning for our future is a collaborative and community-engaged process that includes the Home's key stakeholders:

- Residents
- Families and friends
- Staff
- Donors/funders
- Volunteers
- Lay and professional leadership (past and present)
- Community partners
- Union representatives
- Jewish agency executives

In addition, a Steering Council was formed to guide the visioning process, and to provide leadership and oversight to the various planning initiatives. The council is comprised of individuals representing the Jewish Home's board of trustees, community leaders (Jewish and lay), industry leaders, senior management of the Jewish Home, and donors.





## OUR NEW VISION

The Jewish Home's leadership remains committed to assuring the viability of its programs and services throughout the 21<sup>st</sup> century. An outcome of the strategic visioning process was the creation and adoption of a new "Vision Statement":

To become a regional resource as an integral part of a continuum of care throughout the Bay Area that provides senior adults with a variety of life-enriching programs and services that are accessible, promote individual dignity, encourage independence, connect them to their community, and reflect the social, cultural, and spiritual values of Jewish tradition.

*Formally adopted by the Jewish Home of San Francisco's board of trustees on April 27, 2006.*

## INITIATIVES AND ENDEAVORS

Current and future initiatives and endeavors of the Jewish Home include, but are not limited to:

- The Home's sponsorship of 899 Charleston, a new concept in senior living that is being developed on the Taube-Koret Campus for Jewish Life in Palo Alto.
- The Home, as with other non-profit healthcare operations, is exploring and developing revenue-generating opportunities and collaborative partnerships that support its viability and assist with planning appropriately for its future.
- The Home is examining its organizational structure and associated governance so as to match the needs of the organization for effective management today and into the future.
- The Home is exploring new opportunities to extend and enhance the value of research, as well as collaborative relationships in teaching and education to raise the quality of care and life for older adults to a new level of excellence.
- The Home is developing a strategic plan that is fluid and dynamic, that will be reviewed, evaluated, and updated periodically to reflect the ever-increasing changes that have an impact on the delivery of care and services to older adults, and specifically those relevant to the Home and the residents and family members it serves.



## RECENT ACHIEVEMENTS AND NEXT STEPS

Through the collective efforts, strengths, and support of everyone who is part of the “Jewish Home community” and its community partners, the organization will undoubtedly succeed in creating a new future of care, services, and programs for older adults based on new needs and new realities.

Recent achievements include:

- Board and staff alignment on vision and mission, as well as operating values and principles
- Creation of Jewish Home & Senior Living Foundation
- Successful completion of \$55-million “Fulfilling Our Promise” Comprehensive Campaign
- Successful completion of Jewish Home’s new construction project and infrastructure enhancements
- Development of 899 Charleston and the first foray into regionalization
- Development of community collaborations in education
- Inauguration of first annual board retreat
- Implementation of board self-assessment tool
- Development of clearly-defined board roles and responsibilities and its relationship to senior management
- Development and implementation of new board orientation program
- Development and implementation of conflict of interest guidelines
- Creation of a Governance Restructuring Committee
- Analysis and evaluation of the Jewish Home’s current capital structure and financial profile



## Strategic goals for the next five years include:

- Create and develop a network of affiliated, regionalized senior living offerings to better serve current residents and to extend services to new and emerging clients.
- Restructure the organization and associated governance to match the needs, and more effectively manage today and into the future.
- Refine the Jewish Home of San Francisco's master site plan to realign the Home's national reputation for quality and innovation into modern centers of excellence.
- Create an organizational culture that embraces change, enriches the quality of life for its clients, staff, and volunteers, and is committed to excellence.
- Explore, capture, and create opportunities for new sources of human and financial resources to achieve these goals.

# STRATEGIC VISIONING PROCESS PARTICIPANTS

We gratefully acknowledge and thank the following individuals who have participated in the strategic visioning process to date. They create a platform for defining our current realities and formulating our thinking about the future.

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## OUR MISSION

Enriching the quality of life of older adults.

## OUR VISION

To become a regional resource as an integral part of a continuum of care throughout the Bay Area that provides senior adults with a variety of life-enriching programs and services that are accessible, promote individual dignity, encourage independence, connect them to their community, and reflect the social, cultural, and spiritual values of Jewish tradition.

# OUR CORE VALUES

- Caring & Compassion
- Sensitivity & Understanding
- Accountability & Responsibility
- Integrity & Honesty
- Results-Orientation Focused On Excellence
- Continuous Learning Environment Emphasizing Staff Development & Resident-Centered Care
- Jewish Tradition
- Innovation

# OUR OPERATING PRINCIPLES

The philosophy of the Jewish Home of San Francisco is founded on Jewish tradition, which encompasses respect for elders and responsibility for the welfare for others. This tradition takes into account recognition of the support that has been generously given by the community – past, present, and future – and it is understood that it is the cornerstone of our achievements.

We further recognize that staff and volunteers are the most important resources. We understand that our mission can only be achieved through the combined efforts of staff, volunteers, clients, and their caregivers. We provide an environment that encourages people to learn and flourish.

We continuously strive to improve in the delivery of health and social services to the elderly and their caregivers. We provide care that emphasizes and capitalizes on the individual strengths of each client and family member, and embraces the notion of autonomy.

We are accountable for the effective, efficient, and ethical utilization of human, financial, and material resources in fulfilling our mission.

We protect the interests of the elderly and advocate on their behalf by assuming a leadership role, working cooperatively with others to improve health and social service policy.

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

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