



JVS SoCal
Jobs.Vision.Success.

Strategic Perspectives Report
May 2024

Executive Summary

JVS SoCal: Navigating the Path Forward

JVS SoCal stands at a critical juncture, driven by a mission to empower individuals and strengthen communities through sustainable employment. The organization's commitment to equity and inclusion is clear, yet stakeholders recognize the need for further improvements in people & culture practices and delivering services with diversity in mind. This calls for deeper integration of equity considerations into the business model to prevent unintentional impacts on the communities served.

The demographic survey reveals a workforce predominantly aged 25-34, with a significant representation of women (74%) and a diverse ethnic mix. However, the organization's Net Promoter Score (NPS) of -20 indicates room for improvement in employee satisfaction and advocacy. Despite these challenges, employees express a strong understanding of their roles and a sense of purpose aligned with JVS SoCal's mission.

Team dynamics are generally positive, with employees feeling encouraged to share ideas and experiencing trust within their teams. Yet, the organization faces substantial challenges, including staffing, wages, workload, communication, and leadership. These issues are echoed by board members who also highlight funding and staff engagement as critical areas of concern.

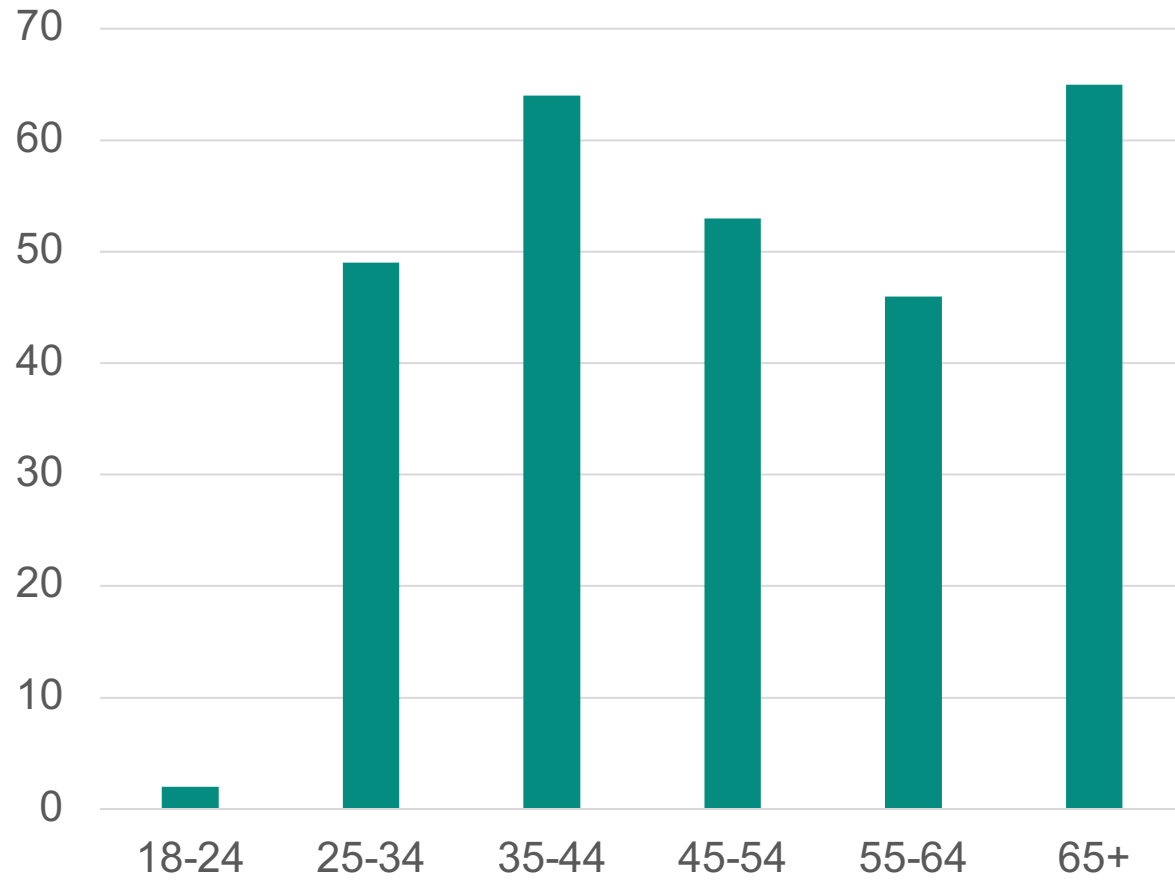
Opportunities abound for JVS SoCal to enhance its impact. Key strategies include focusing on employee development, improving wages, fostering a positive company culture, and expanding marketing efforts. Board members suggest further program expansion and exploring alternative revenue streams to build a sustainable financial foundation.

The organization is perceived as moderately effective in its mission, with notable strengths in its long history, commitment to customers, and a diverse range of programs. However, there is a consensus on the need for better internal communication, process efficiency, and talent retention.

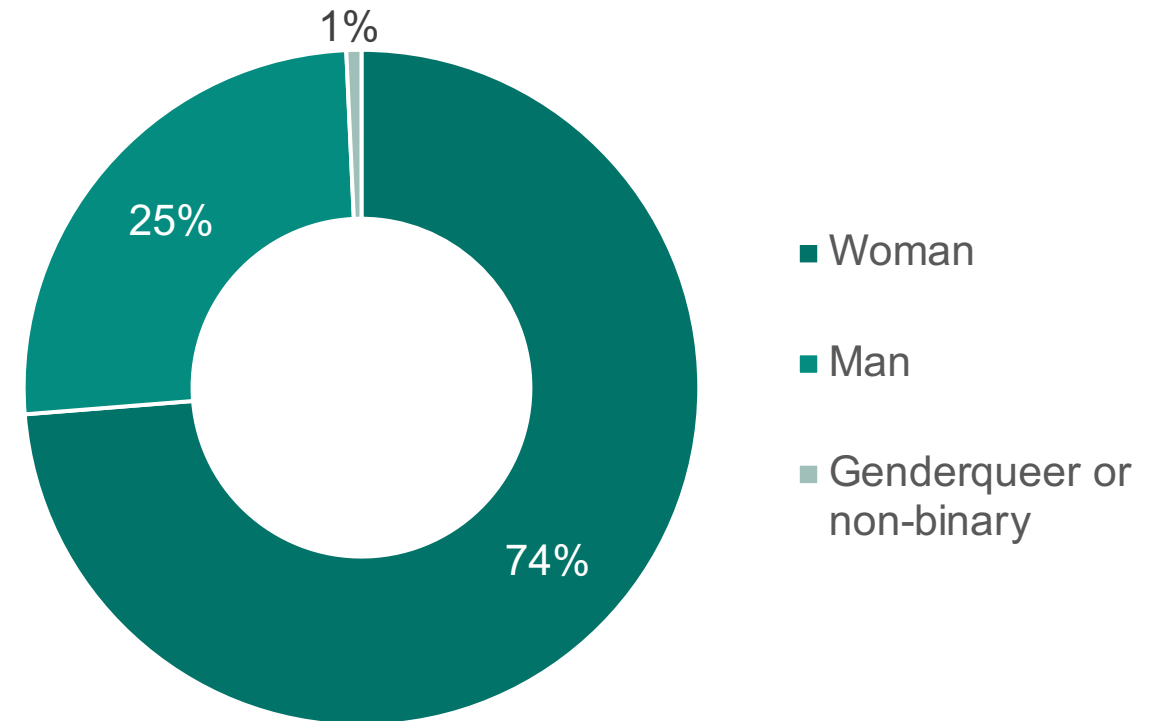
The journey ahead for JVS SoCal is clear. By addressing current challenges and seizing strategic opportunities, the organization can navigate its path forward, driven by a shared commitment to empowering individuals and fostering community resilience.

Stakeholder Survey

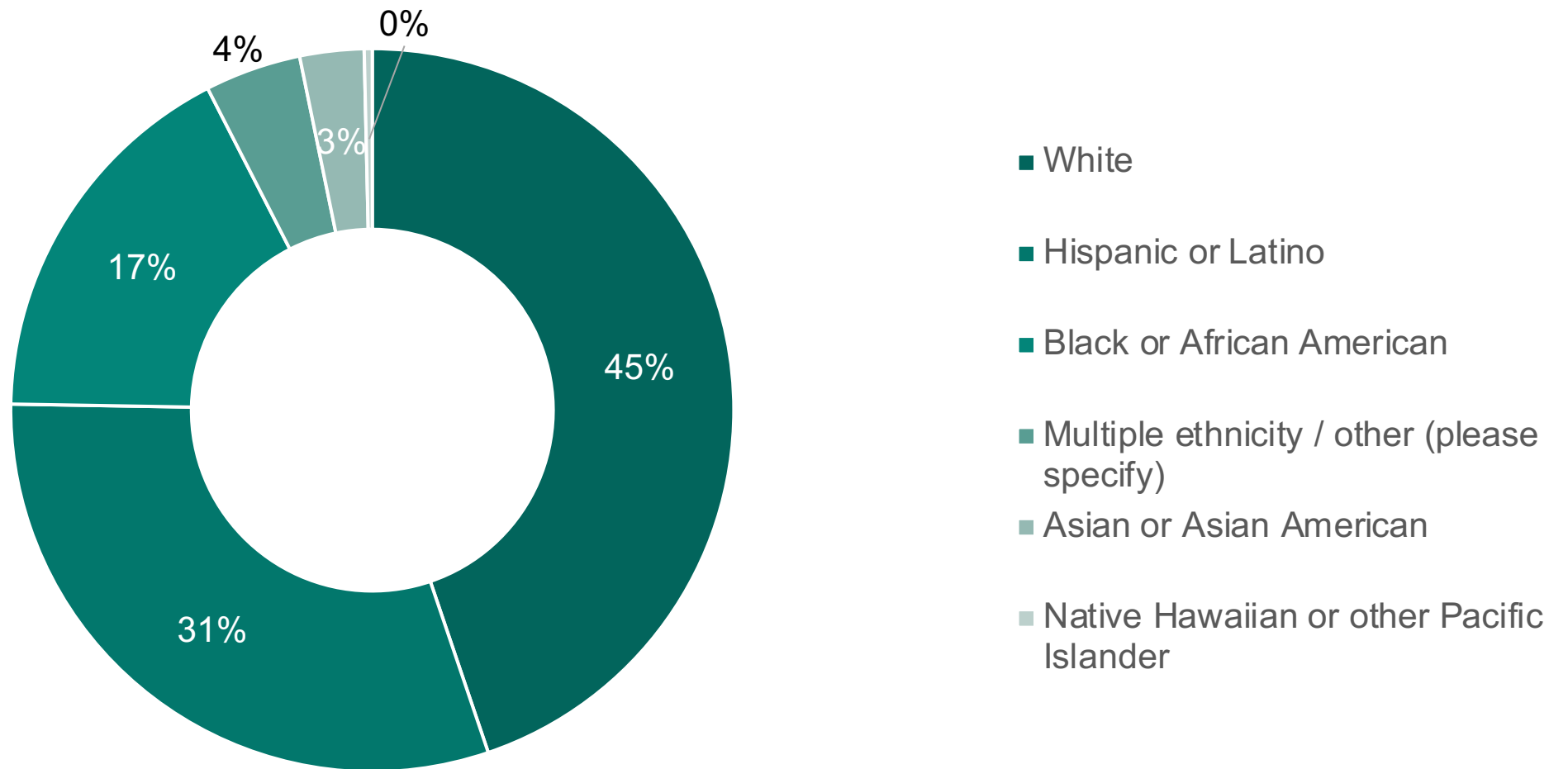
What is your age?



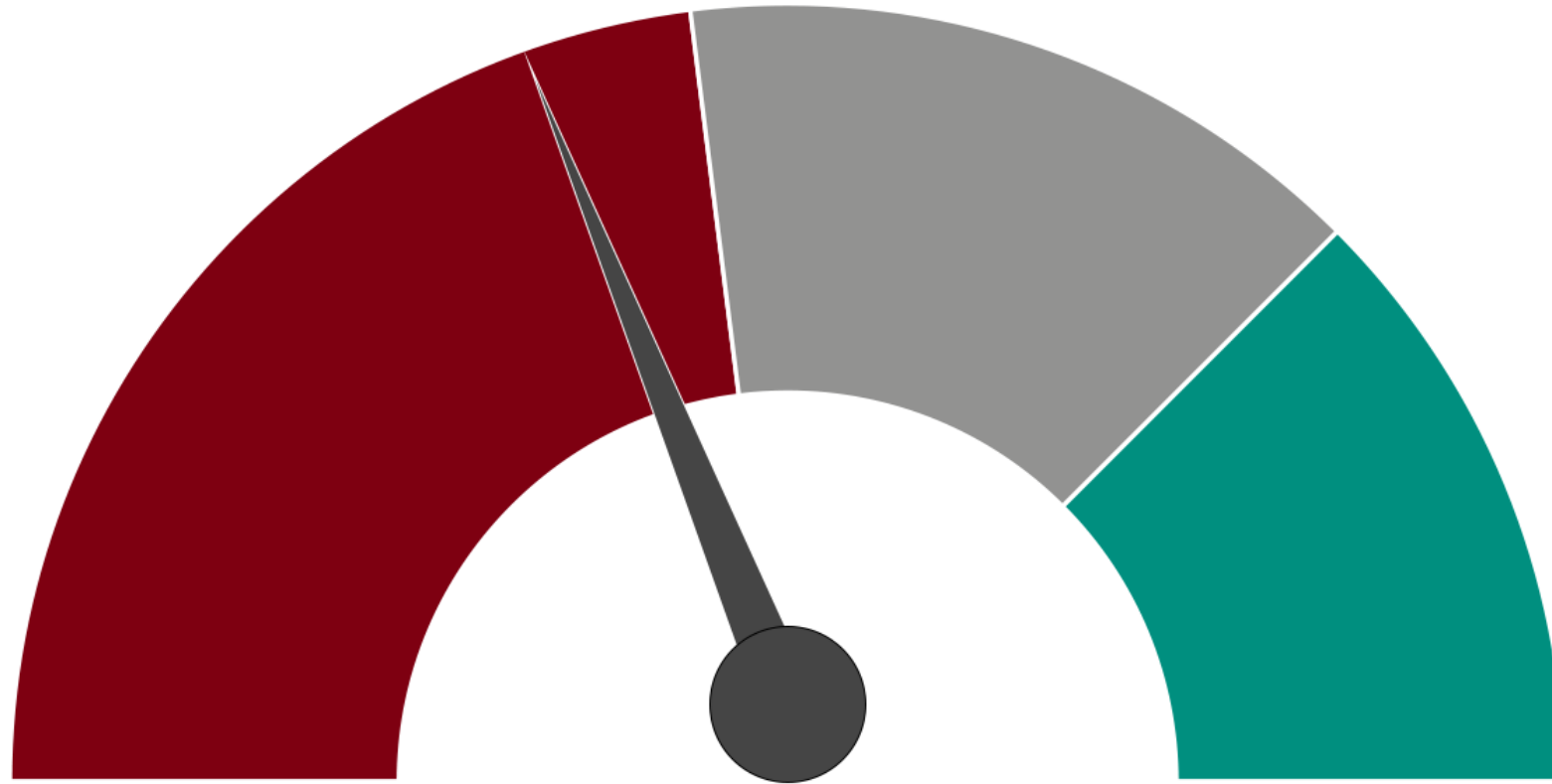
What is your gender identity?



Which race/ethnicity best describes you? (Please choose only one)

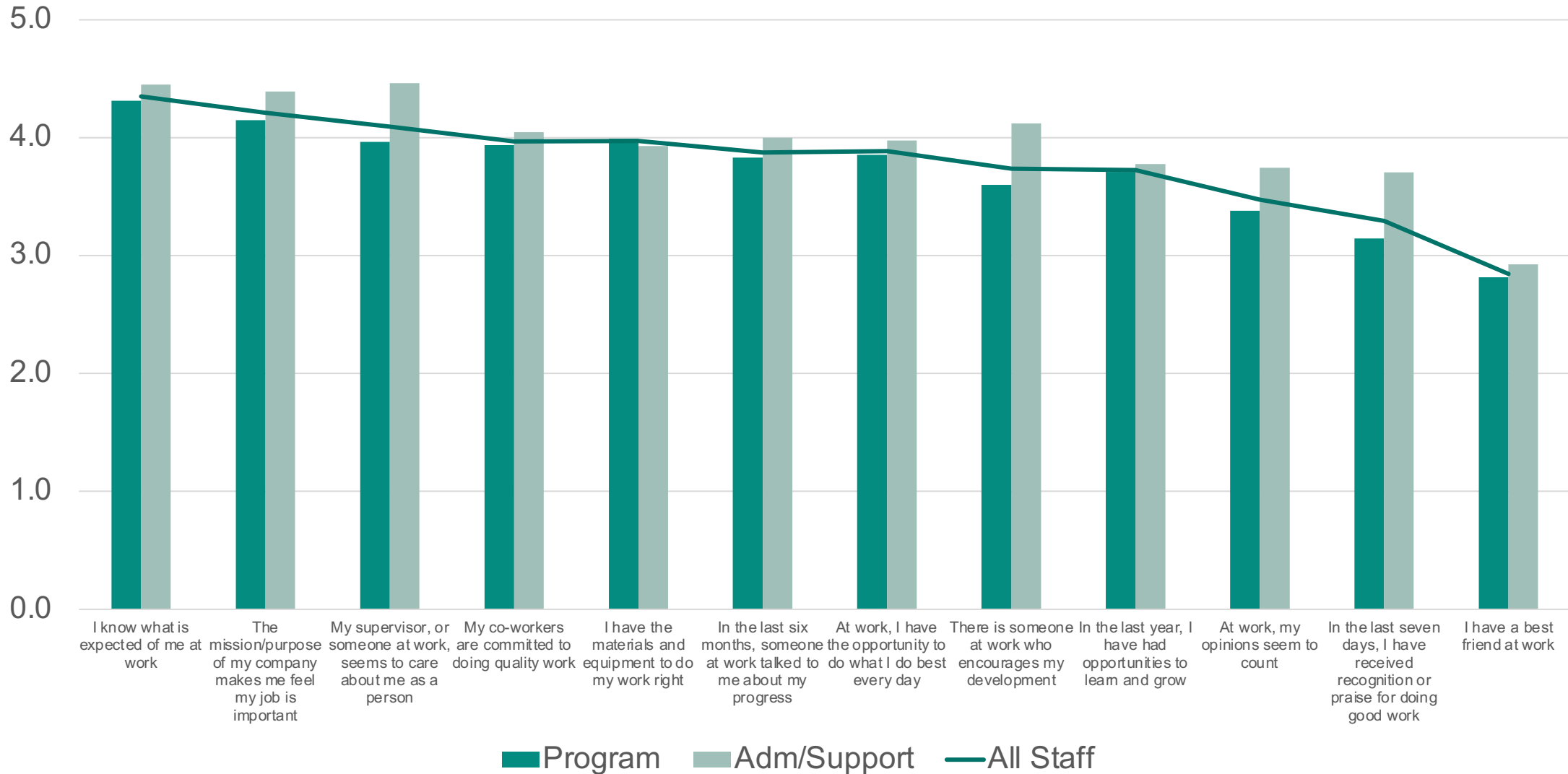


How likely is it that you would recommend working at JVS SoCal to a friend or colleague?

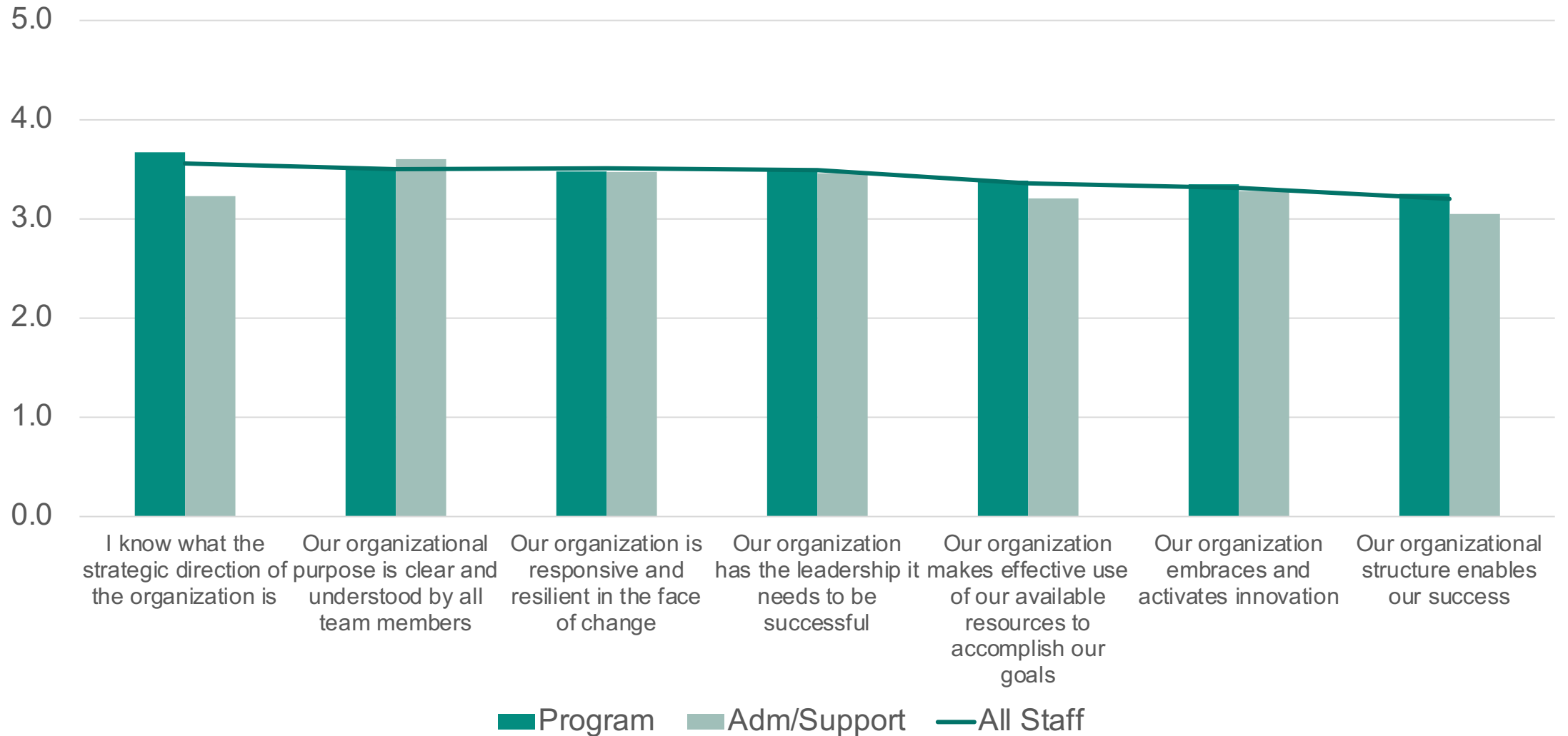


-20
NPS

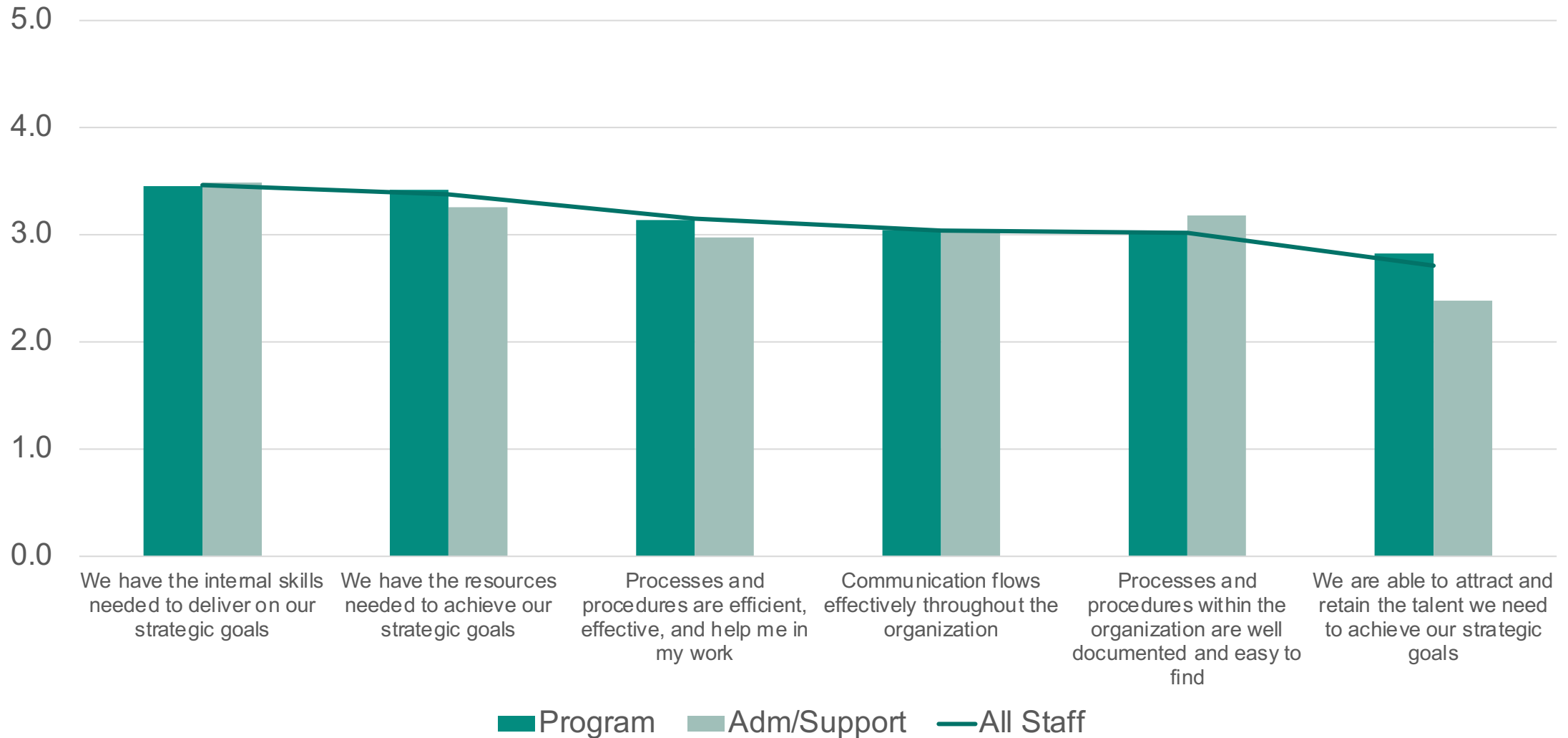
Please indicate your level of agreement with each of the following statements:



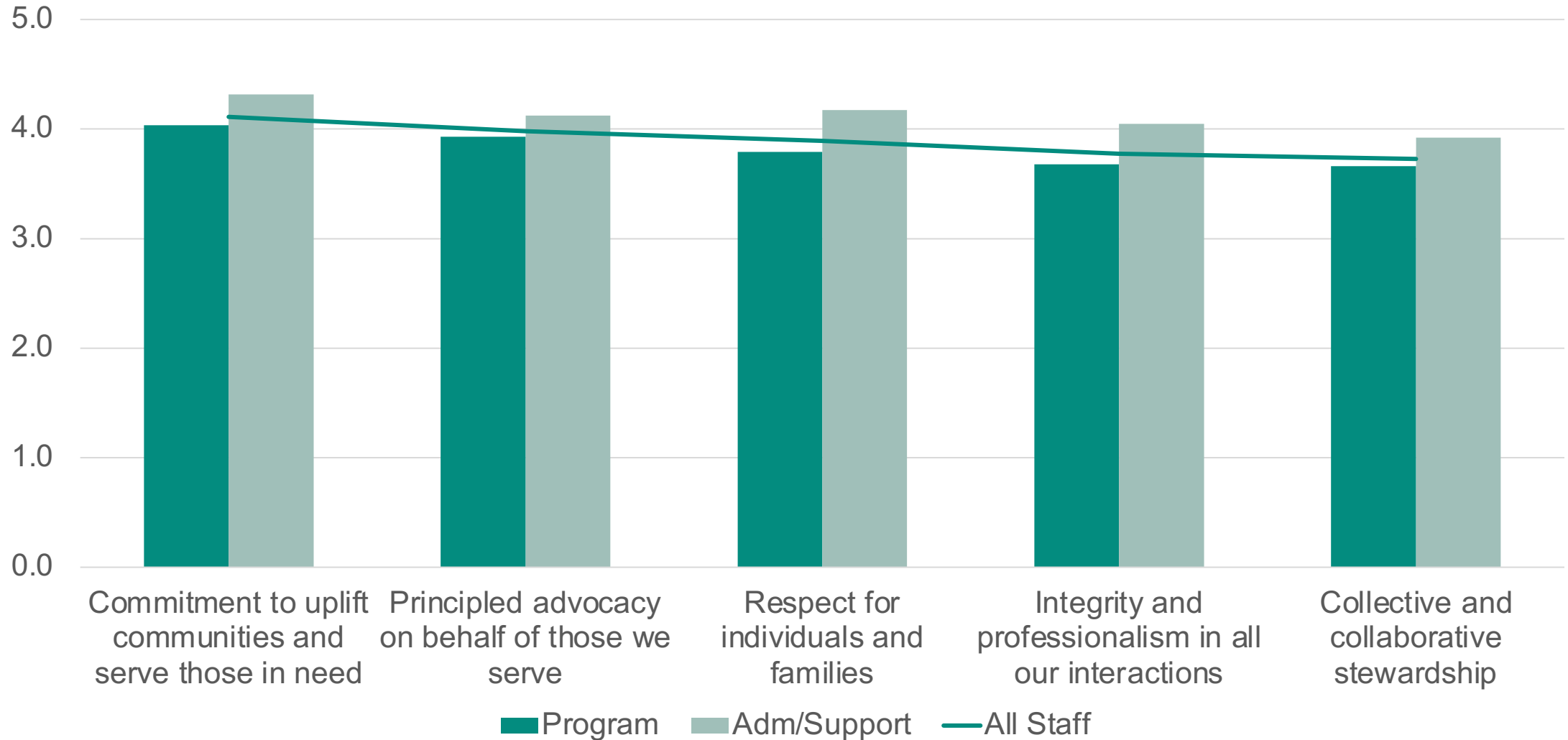
Please rate your level of agreement with each of the following statements about JVS SoCal as an organization



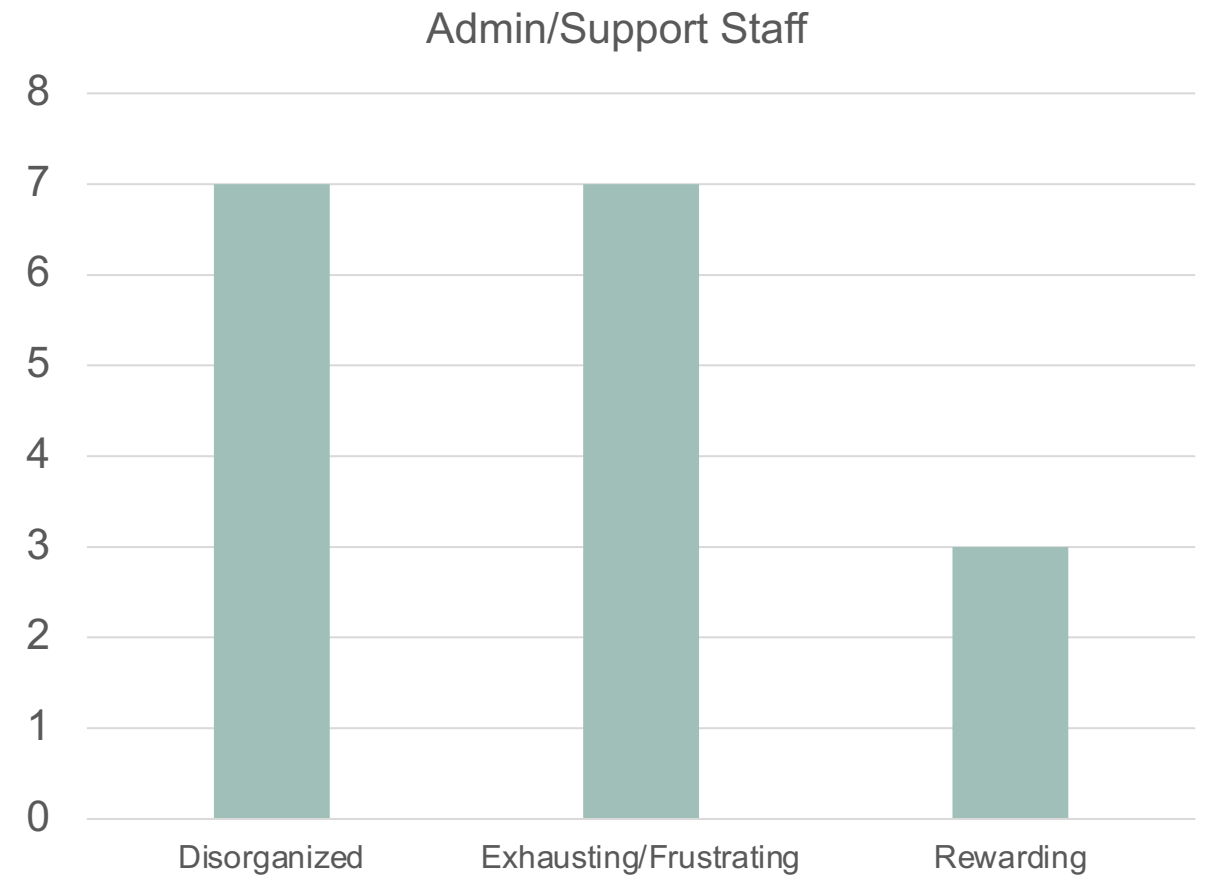
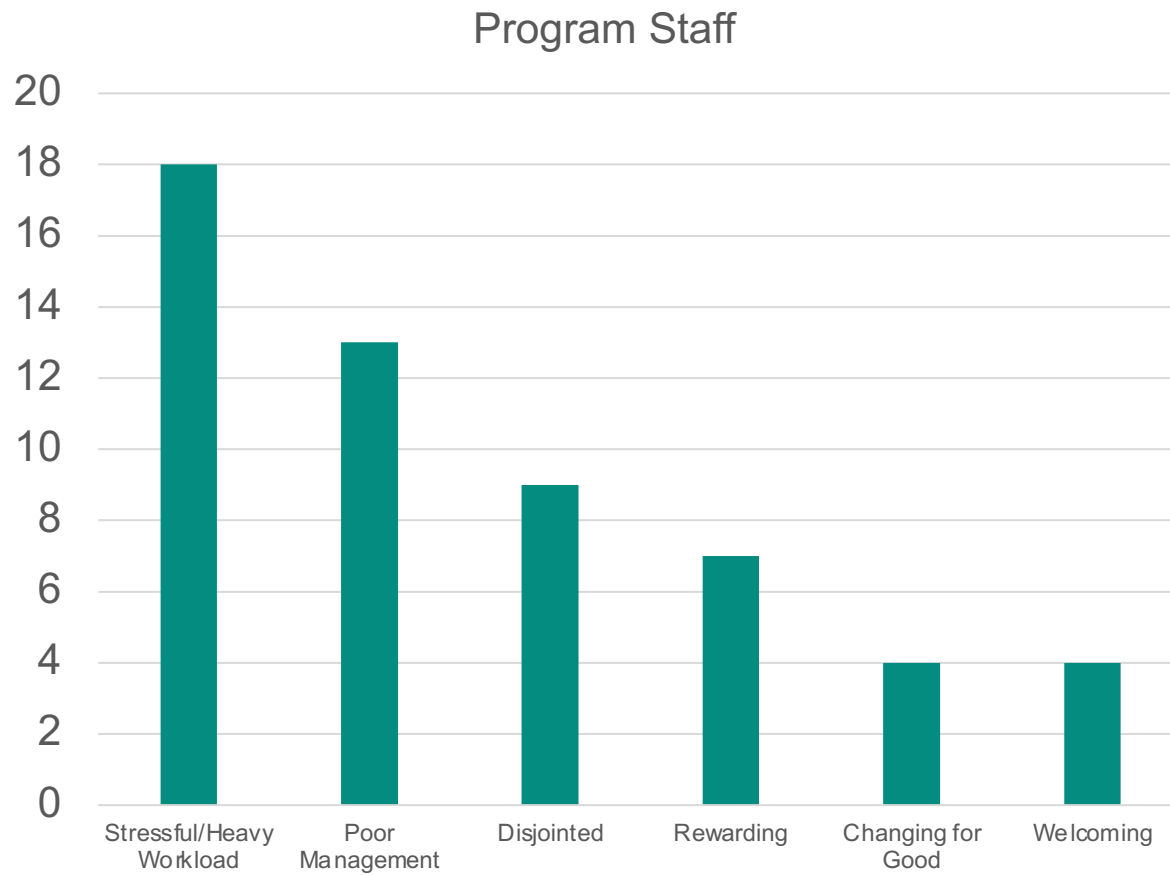
Please rate your level of agreement with the following statements regarding JVS SoCal



How well do you believe that JVS SoCal lives up to each of its values:



How would you describe the organizational culture of JVS SoCal? What does it feel like to work there?



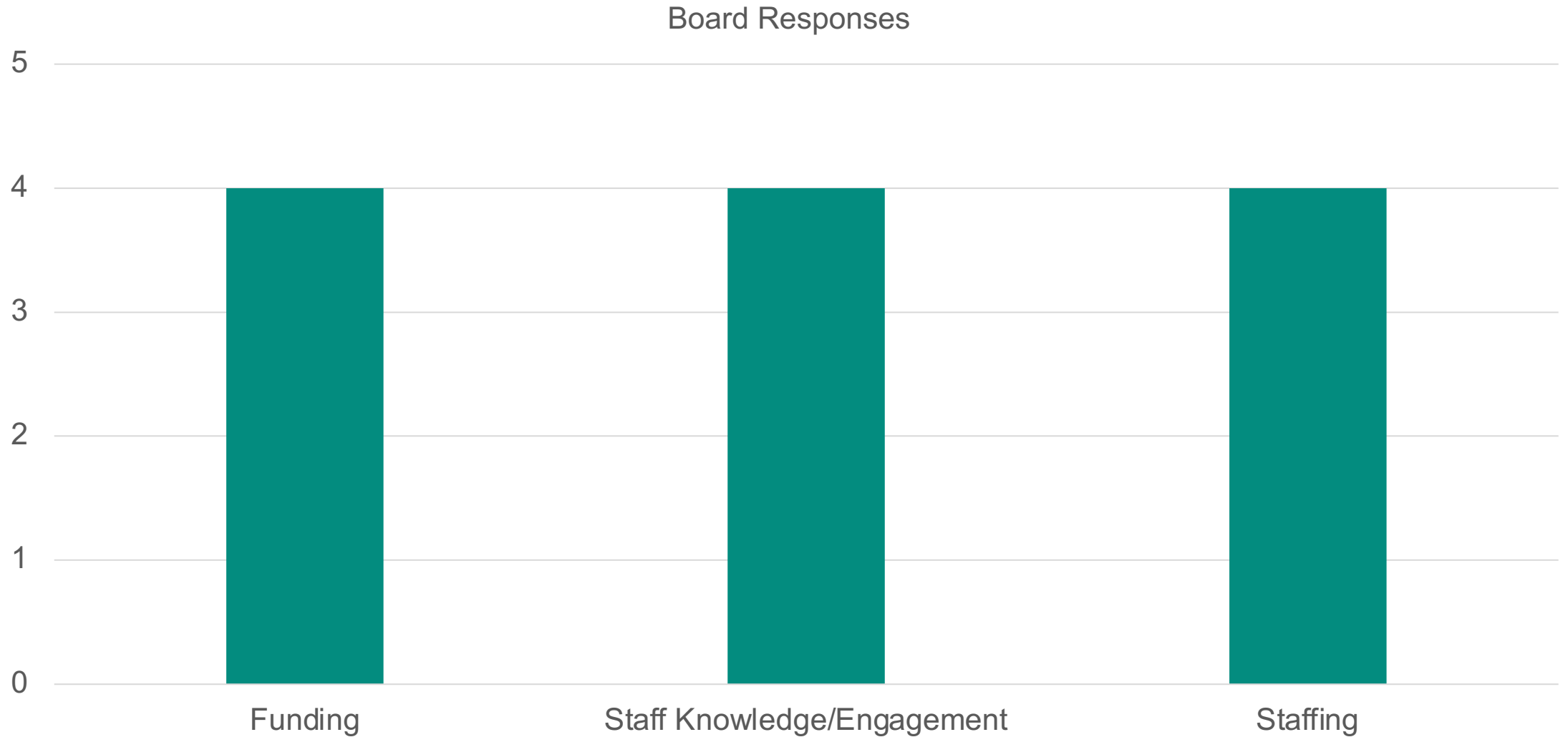
Please rate your agreement with the following statements about team dynamics at JVS SoCal, where 1=completely disagree and 5=completely agree:



In your opinion, what are the top three CHALLENGES that JVS SoCal faces?

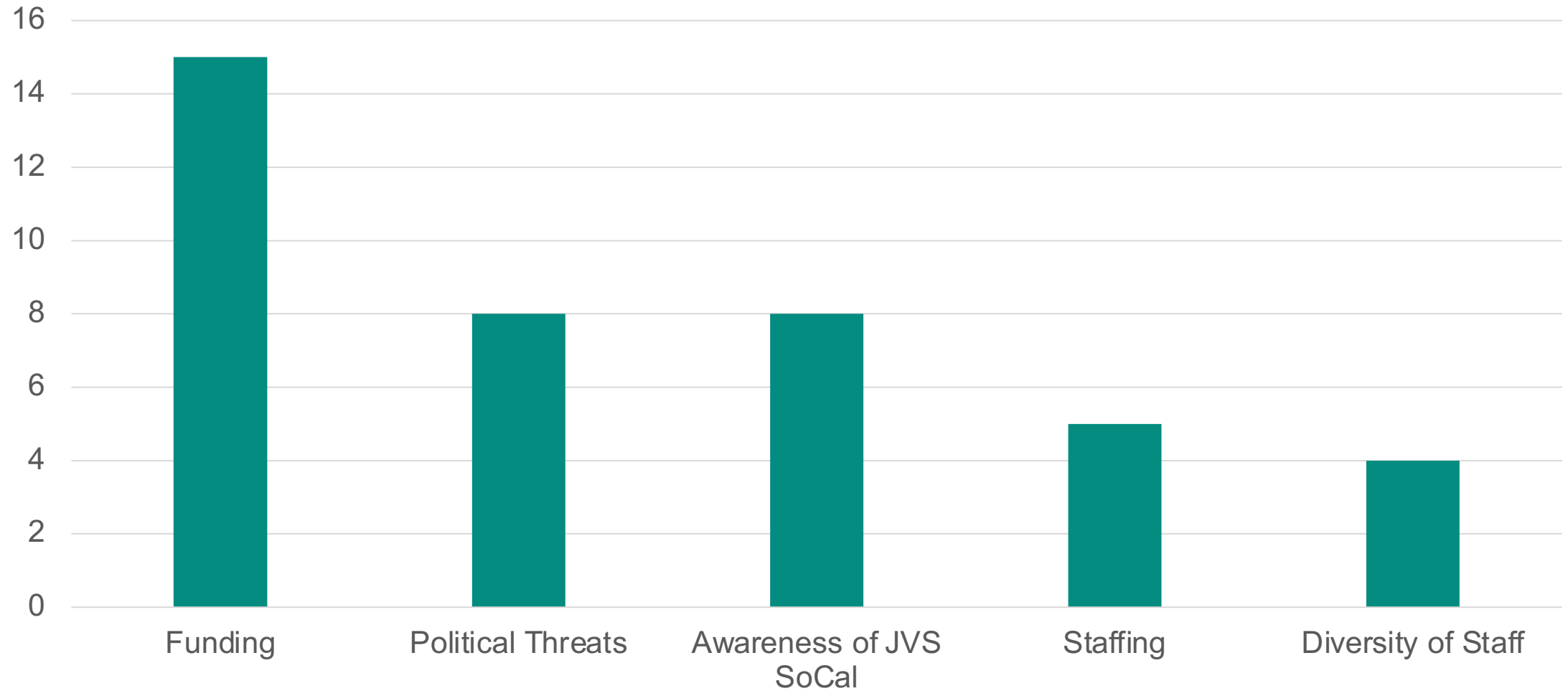


In your opinion, what are the top three CHALLENGES that JVS SoCal faces?



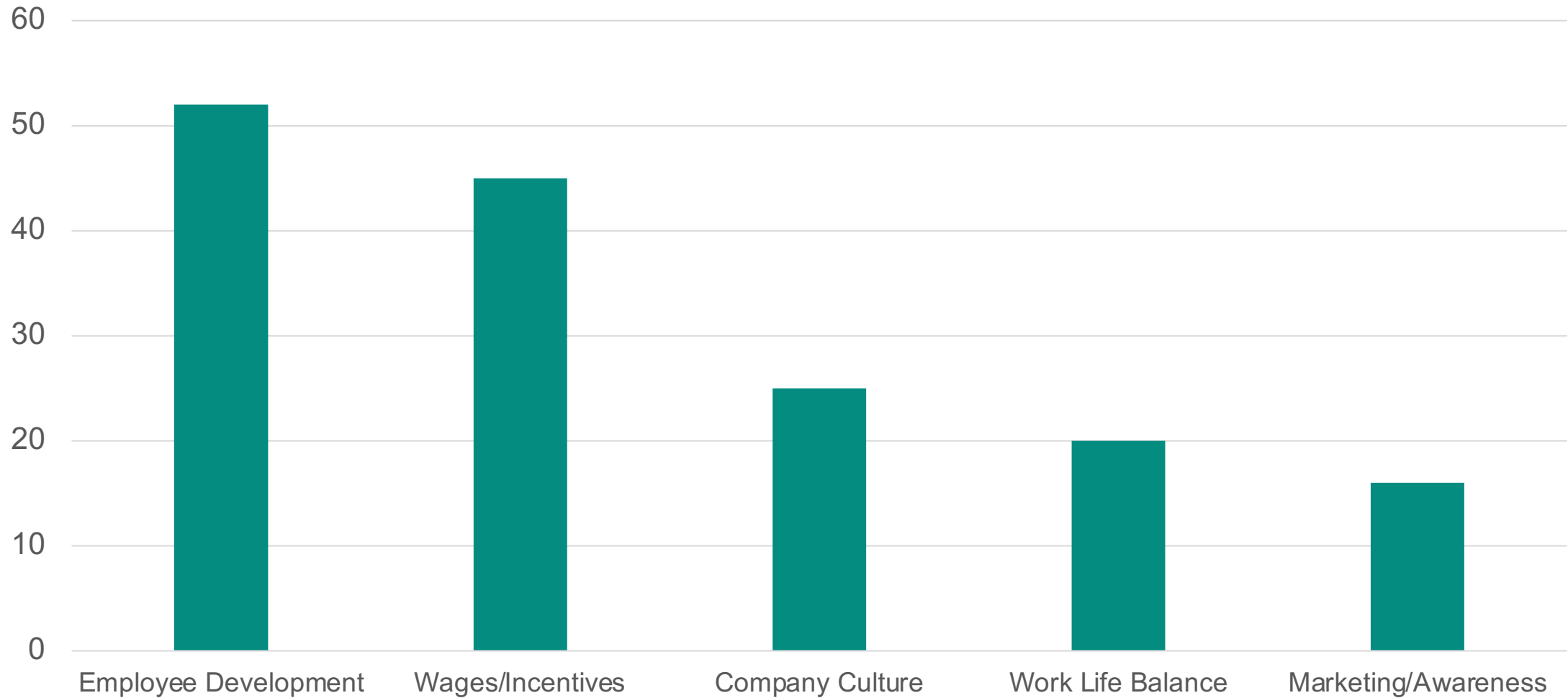
In your opinion, what are the top three CHALLENGES that JVS SoCal faces?

Stakeholder & Partner Responses

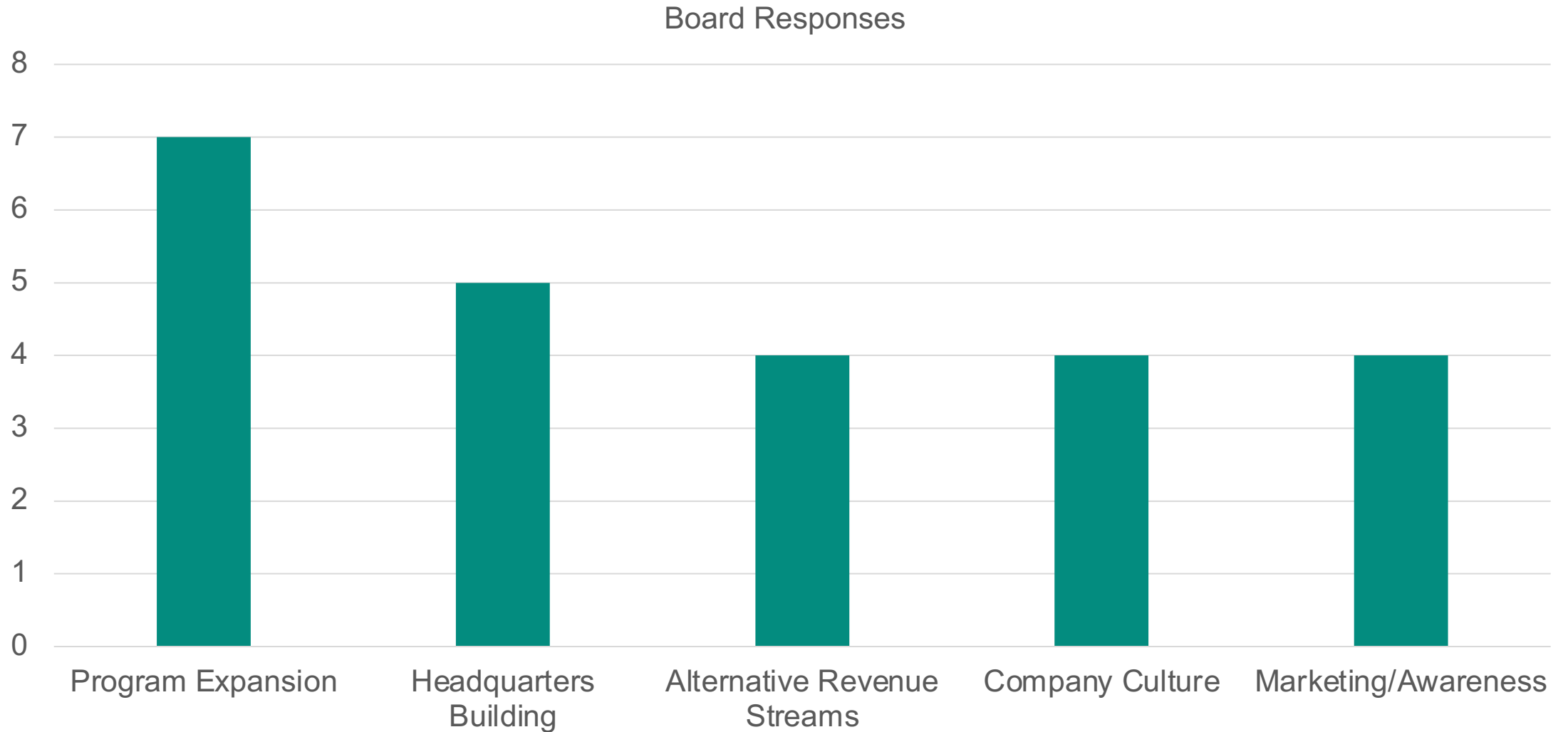


In your opinion, what are the top three strategic OPPORTUNITIES that JVS SoCal should take advantage of IN THE NEXT THREE YEARS?

Staff Responses



In your opinion, what are the top three strategic OPPORTUNITIES that JVS SoCal should take advantage of IN THE NEXT THREE YEARS?

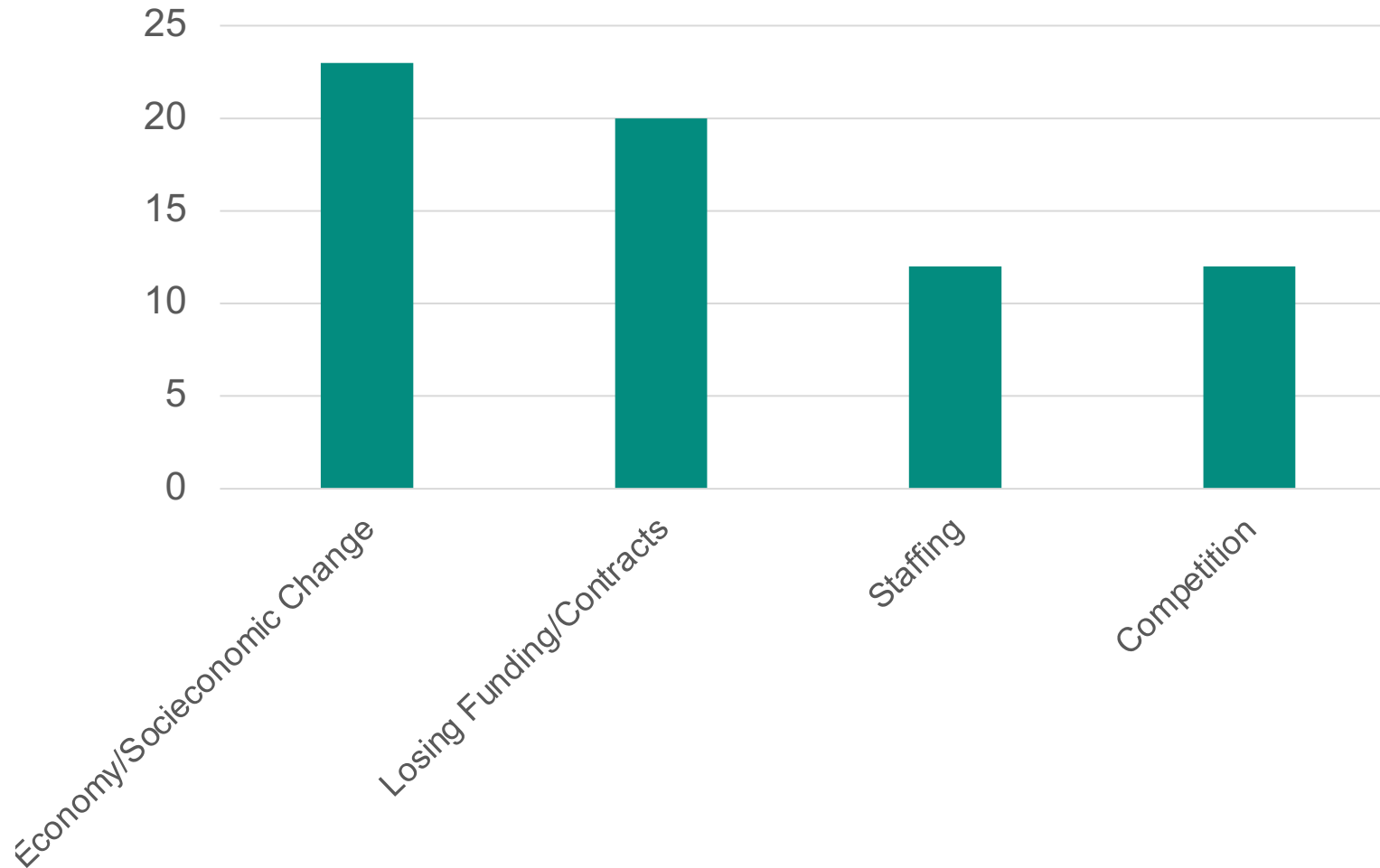


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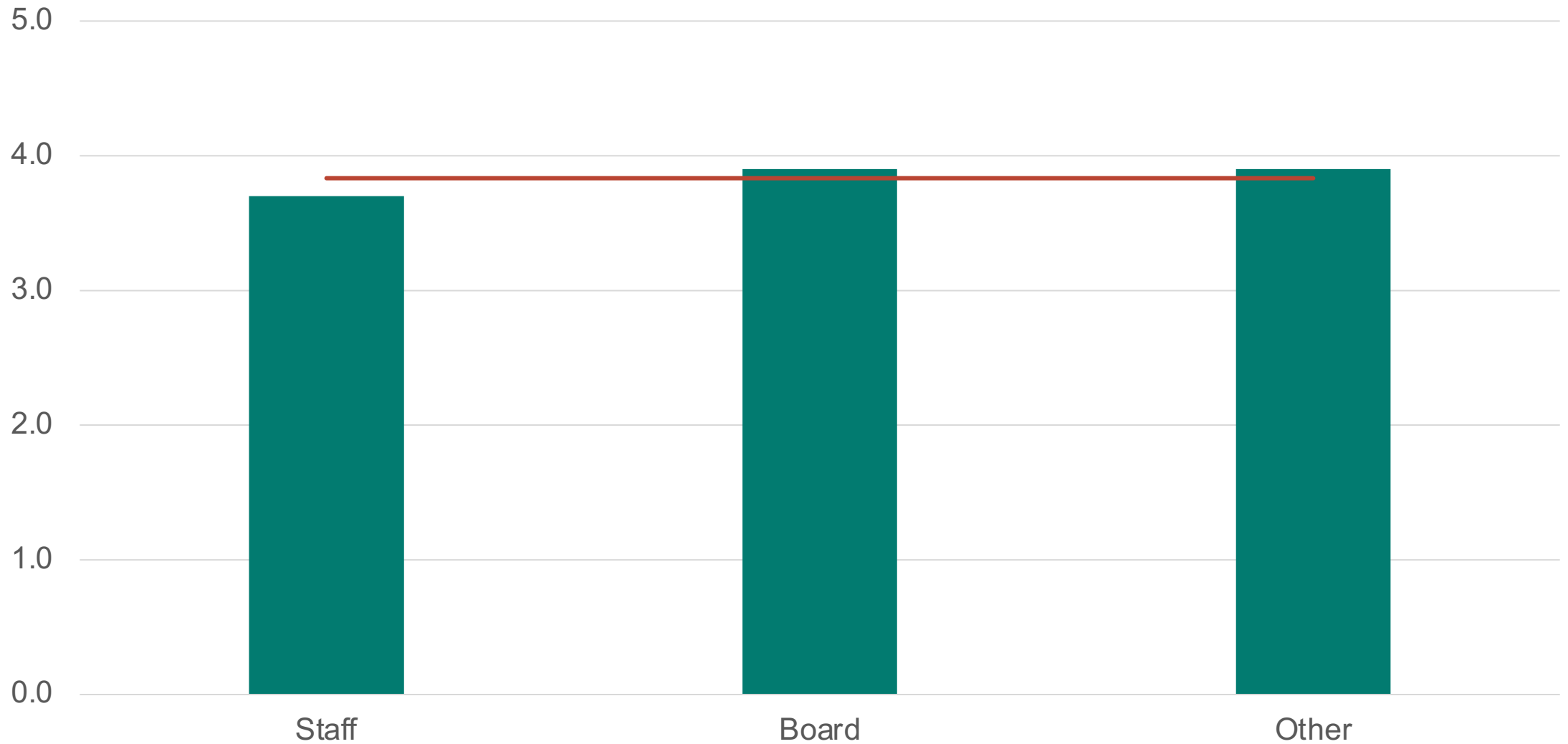


When you think long-term, what external threats might keep JVS SoCal from doing its best work?

All Responses



JVS SoCal's mission statement is: "Empowering individuals to achieve dignity and economic independence through sustainable employment. "In your opinion, how effective is the organization at serving its mission?"



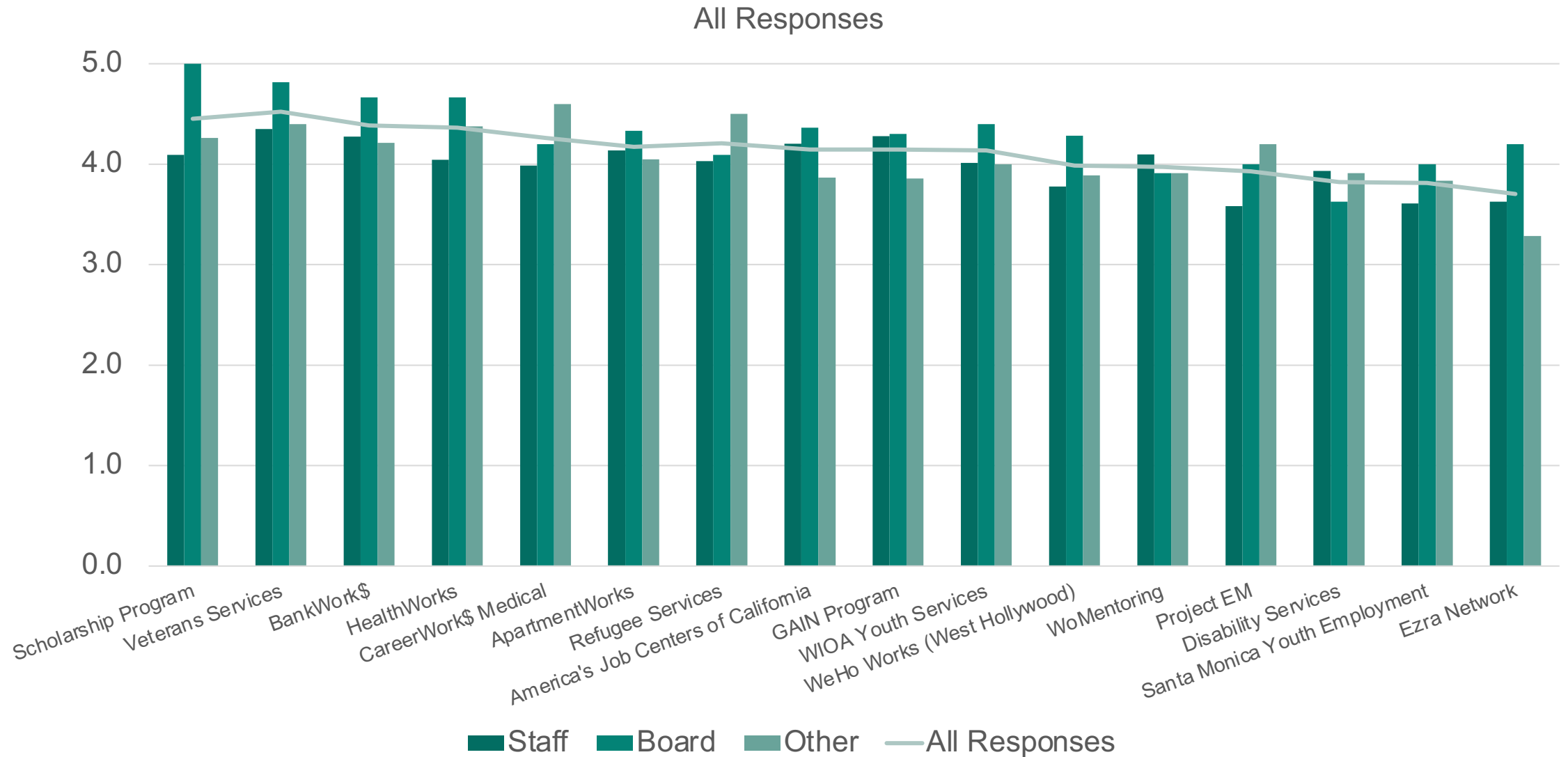
Indicate your opinion of how focused JVS SoCal is on the right things, where 1 is not at all focused and 5 is completely focused on the right things:



What actions/programs/promotions haven't you seen from JVS SoCal that you'd like to see?



How would you rate the effectiveness of each of these JVS SoCal programs:



Strategic Perspectives

1. Community Engagement and Connections

JVS SoCal prides itself on being deeply rooted in the communities it serves. The organization's community-focused approach is evident through its active engagement and strong connections with diverse populations.

By maintaining robust community ties, JVS SoCal ensures that its services are accessible and relevant. Balancing branding efforts while promoting the tangible impact of their programs is essential in strengthening these connections and fostering trust within the community.

- ▶ “I think the charitable part of the organization and its board members and supporters have been there throughout the history of the organization.”
- ▶ “I think the strength and connection of Service Board and Advisory Committee and leadership over the years in terms of just connections that give them some standing both with government and the... communities in the L.A. area.”
- ▶ “They've done a lot with the refugees in recent years, which reflects [engagement with the community] as well.”
- ▶ “They're very good at connecting with the community. I would say they're... pretty good at connecting with people.”

1. Community Engagement and Connections

Strategic Considerations

- JVS SoCal can build from a place of strength in its relationships with donors and government funders
- Higher visibility within the populations that JVS SoCal serves is perhaps warranted, and marketing may be a tool to make more of those connections

In your opinion, what are the top three strategic OPPORTUNITIES that JVS SoCal should take advantage of IN THE NEXT THREE YEARS?



2. Diversity, Equity, and Inclusion

JVS SoCal is committed to fostering an inclusive environment that values diversity and promotes equity. The organization prioritizes hiring practices that reflect the communities it serves, ensuring that staff members bring diverse perspectives and lived experiences to their roles.

DEI efforts are embedded in all aspects of the organization, from service delivery to internal policies, creating a culture that champions equity and inclusivity. This commitment is evident in their diverse workforce. Stakeholders have noted the organization's efforts to make DEI a visible and integral part of their operations.

- ▶ “ With full recognition that at the management level and below, they've really made some strides with the people they hire to deliver the services.. [they are] very diverse, come from lived experience, and connect well to the community.”
- ▶ “ I think they've taken a different approach. They've taken steps into bringing equity and inclusion to the forefront making it more noticeable making it more part of a conversation.”
- ▶ “We're about equity.”
- ▶ “They've taken steps [to bring] equity and inclusion to the forefront, making it more noticeable, [and] making it more part of a conversation.”

2. Diversity, Equity, and Inclusion

Strategic Considerations

- At it's core, JVS SoCal is an organization that fosters equity, and this is a large part of the organization's reputation
- Employing team members with lived experience fosters trust and empathy with clients
- Although the broader workforce at JVS SoCal is highly diverse, some questions remain about the diversity of the leadership team

In your opinion, what are the top three CHALLENGES that JVS SoCal faces?



3. Leadership and Governance

Effective leadership and strong governance are pivotal to JVS SoCal's success. The organization recognizes the importance of recruiting younger board members and enhancing leadership diversity to reflect the community it serves.

Strengthening governance practices ensures that the board can provide strategic direction and oversight. By cultivating a diverse and dynamic leadership team, JVS SoCal can better address the evolving needs of its clients and stakeholders. This focus on leadership diversity is seen as crucial for driving the organization's strategic initiatives forward .

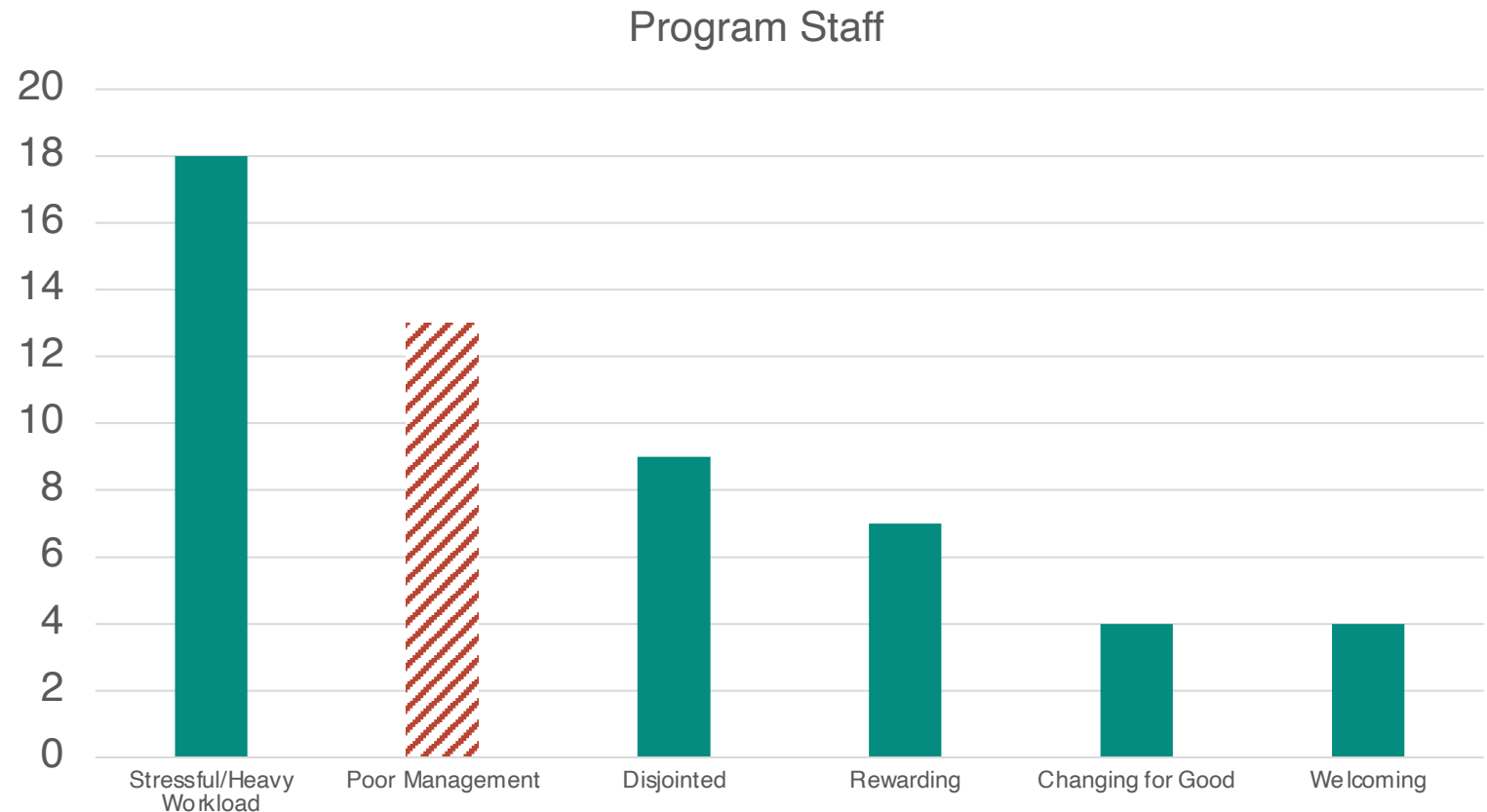
- ▶ “I think we accomplished a bunch in the strategic plan but not to the degree we needed to because we had weak leadership.”
- ▶ “I mean, studies have shown that people don't always leave their jobs because of pay... it's working environment, it's leadership.”
- ▶ “I think changes are starting to happen, but I would love to keep see continued momentum and seeing more diversity at the leadership level.”
- ▶ “[We need] adults in the room so we can leverage Jeff to do what he is capable of doing... But he has the complete support of a very engaged board which is incredible.”

3. Leadership and Governance

Strategic Considerations

- Systems and processes at JVS SoCal are an area of opportunity, particularly when it comes to meeting the requirements of government contracts
- Recent history at JVS SoCal included gaps in leadership and Board oversight, and although many steps have been taken to rectify, there is still more to do
- Diversification of the Board, particularly in terms of age, was raised by several stakeholders: "We got a we got to find more younger people to get on the board."

How would you describe the organizational culture of JVS SoCal? What does it feel like to work there?



4. Innovation and Adaptability

JVS SoCal embraces innovation and adaptability as key drivers of its mission. The organization encourages a culture of creativity and risk-taking, enabling it to respond effectively to changing circumstances. By fostering collaboration and improving its technology, JVS SoCal can find new ways to improve service delivery and address emerging challenges.

Embracing change and staying agile ensures that the organization remains relevant and impactful in a dynamic environment. During the COVID-19 pandemic, for example, JVS SoCal quickly adapted its fundraising strategies to ensure continuity of services. Their proactive approach to change is a testament to their innovative spirit.

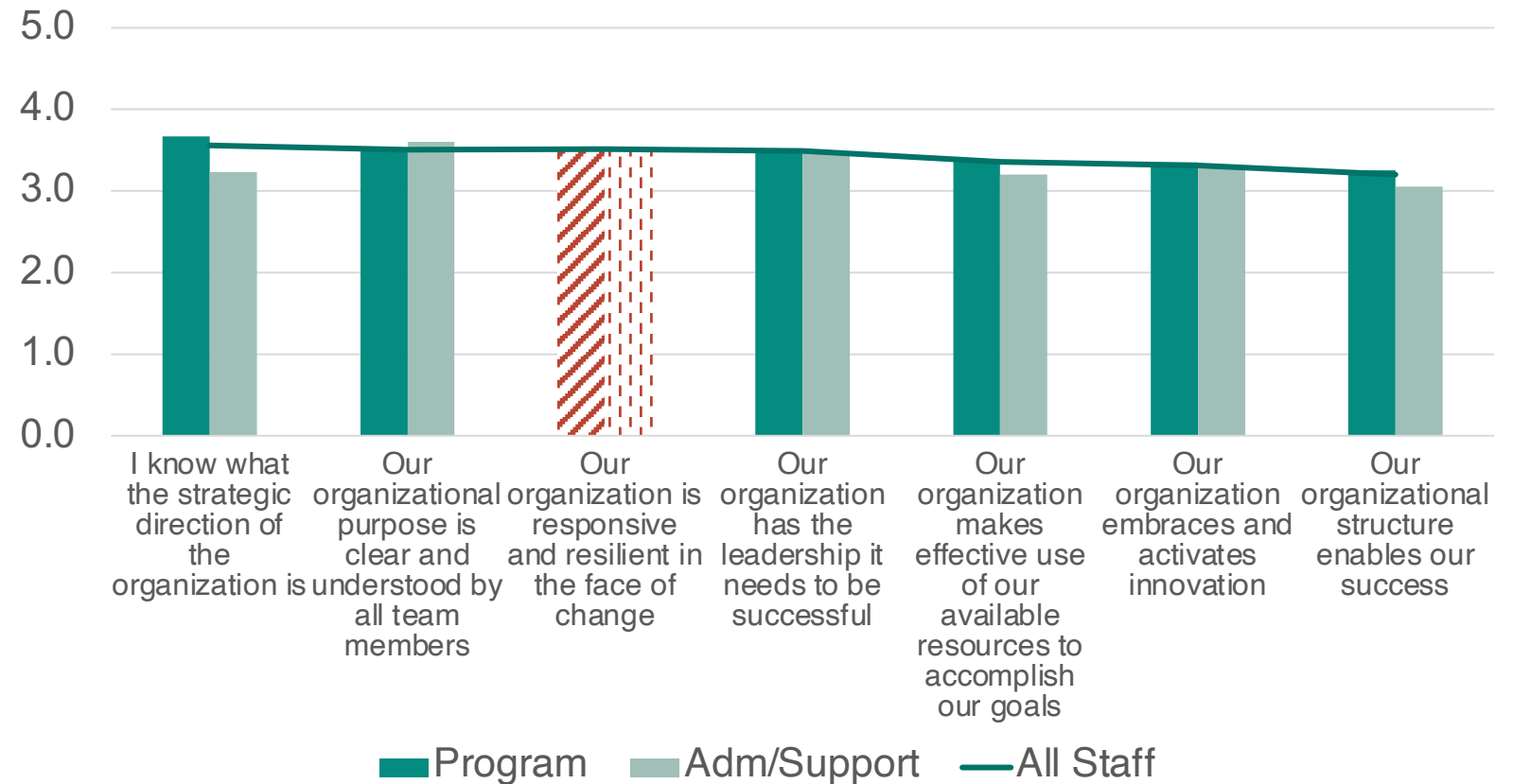
- ▶ “I feel like during the last 10 years we did raise some innovation to the fundraising side. Especially around COVID We had to be quick on our feet and do whatever it took to keep the mission going.”
- ▶ “I've been advocating for more virtual town halls. And virtual space where people in need and in gathering information, just an intranet.”
- ▶ “I worked with over a dozen other nonprofits through [COVID], and there were some that were nimble, and some that were less nimble. JVS was nimble... shifting their delivery services from a systematic level.”
- ▶ “Before Jeff came, it felt a little sleepy. Like this is the way we've always done it. [But] I know that [Jeff's] got that in him. So I think he'll bring that as a change maker.”

4. Innovation and Adaptability

Strategic Considerations

- Recent program developments demonstrate both a capacity and a willingness to try bold new things and innovative approaches
- However, in a rapidly changing world, JVS SoCal may need to ramp up its ability to innovate
- Deliberately setting up the structures and resources to enable calculated risks should be considered

Please rate your level of agreement with each of the following statements about JVS SoCal as an organization



5. Financial Sustainability

Ensuring long-term financial sustainability is critical for JVS SoCal. The organization is focused on diversifying its funding sources to reduce dependency on any single revenue stream. Enhancing financial controls and transparency is essential to maintaining donor trust and securing funding from a variety of sources, including government grants, private donations, and corporate partnerships.

By building a robust financial foundation, JVS SoCal can continue to expand its programs and services. Stakeholders have highlighted the importance of financial diversification, noting that it is key to the organization's resilience and ability to support its mission over the long term.

- ▶ “They need some organizational accounting checks and balances better than they've had in the past.”
- ▶ “If the Jewish community is your primary donor base—not including government contracts—you need to radically diversify... diversifying your portfolio, creating a foundation.”
- ▶ “I'm sure [our biggest opportunity is] funding because I mean, all nonprofits we need the funding in order to be able to fly. But it's probably funding that comes with those connections and amazing people.”
- ▶ “You know, a lot of a lot of these programs that they operate in... the funding hasn't kept up with what you need to pay people now... [and] that will be a challenge until... there's something done that sends it in the right direction.”

5. Financial Sustainability

Strategic Considerations

- JVS SoCal receives funding from many sources, but some sources may be relied upon too heavily
- Many stakeholders described an imperative to diversify funding streams
- More rigorous fiscal management is being implemented at the organization, and successful implementation will be critical to success

In your opinion, what are the top three CHALLENGES that JVS SoCal faces?



6. Program Growth and Effectiveness

JVS SoCal is dedicated to expanding its successful programs and ensuring they are effective in meeting the needs of the community. Leveraging partnerships with other organizations allows JVS SoCal to enhance its reach and impact. Continuous evaluation and improvement of program offerings ensure that they remain relevant and responsive to the needs of clients.

By focusing on program growth and effectiveness, JVS SoCal can better fulfill its mission. For example, their banking and healthcare training programs have been highly successful and well-received by the community.

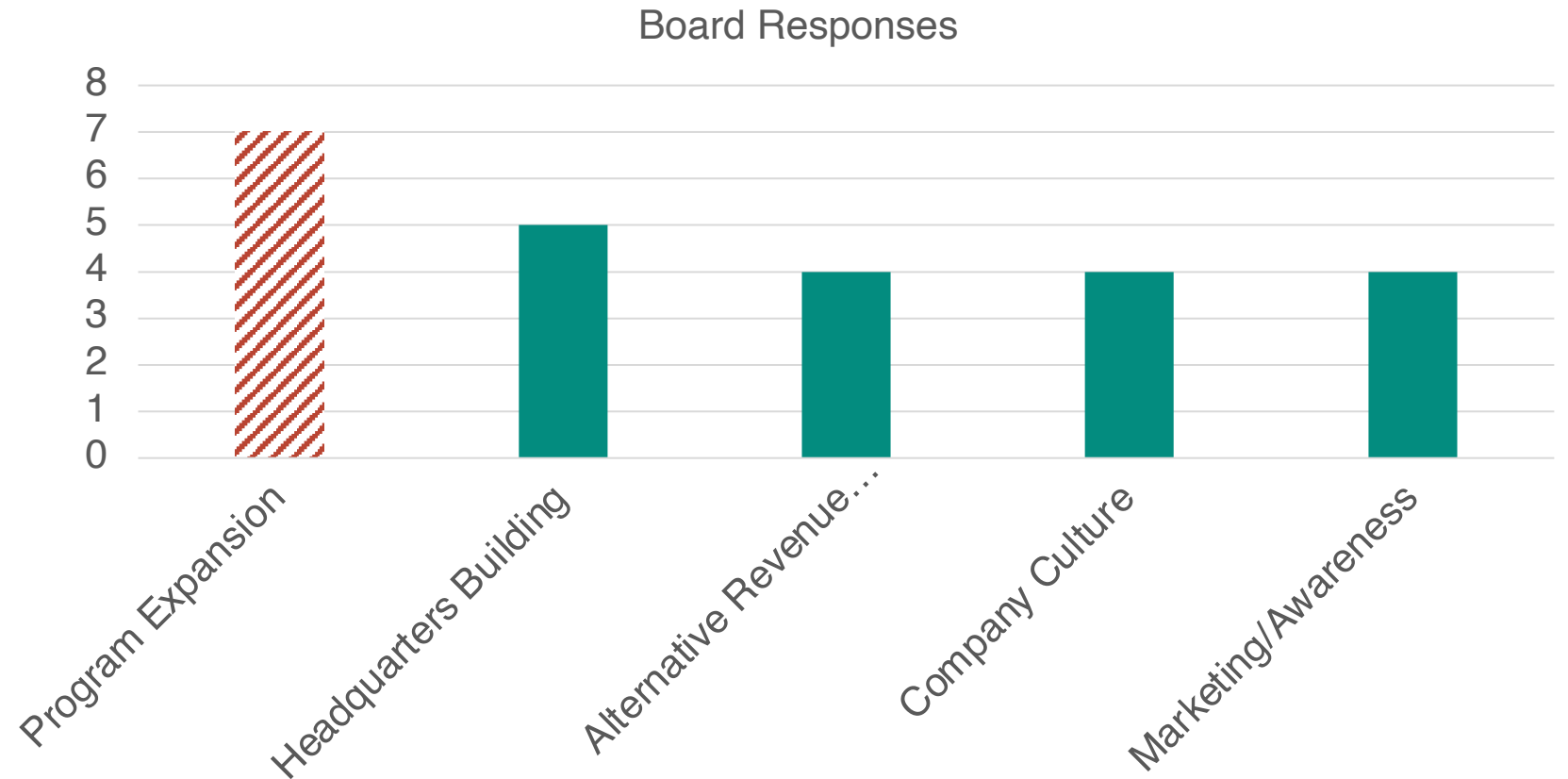
- ▶ "Teaming up more with other similarly situated nonprofits—not competing—is a way to kind of grow beyond our reach, but also expand our mutual provision of services to the underrepresented community."
- ▶ "Our caseload sizes have grown astronomically over the last couple of years and we need to figure out how to solve that."
- ▶ "One thing [to] look at is all their programs that are under-spent. There really shouldn't be any reason for leaving so much public money on the table."
- ▶ "We just started a new program with RadNet which is training MRI techs. That's an innovative program that we own."

6. Program Growth and Effectiveness

Strategic Considerations

- JVS SoCal manages an impressive portfolio of programs but questions remain as to whether the program portfolio best represents the needs of today's workforce
- An audit of program alignment to mission may be called for
- Development of cutting-edge programs will be a key strategic focus

In your opinion, what are the top three strategic OPPORTUNITIES that JVS SoCal should take advantage of IN THE NEXT THREE YEARS?



7. Brand Recognition and Marketing

Improving brand recognition and aligning under a unified identity are essential for JVS SoCal's outreach efforts. Targeted marketing strategies, including engagement with the Latino community, help to raise awareness of the organization's services. Effective branding not only enhances visibility but also builds trust and credibility with stakeholders.

By consistently promoting its impact, JVS SoCal can attract more clients, donors, and partners to support its mission. Stakeholders have noted the organization's efforts to improve brand visibility through social media and other marketing channels, which have been effective in reaching a broader audience.

- ▶ “I think... the CEO... was sort of completing his first year. And I liked what I saw coming, which was looking at their reputation from a different perspective.”
- ▶ “I think brand recognition and community awareness really, really helped us—I know they're doing a good job in social media.”
- ▶ “I wonder if the JVS brand is well known enough in the communities that we serve.”
- ▶ “They're certainly well known in the Jewish community... I'm not sure they're well known in the minority communities.”

7. Brand Recognition and Marketing

Strategic Considerations

- Improving visibility and aligning under a unified identity will help outreach into key targeted communities, such as the Latino community
- The rebranding effort gets mixed reviews and there remains some confusion about the organization's identity

In your opinion, what are the top three strategic OPPORTUNITIES that JVS SoCal should take advantage of IN THE NEXT THREE YEARS?



8. Operational Efficiency

JVS SoCal is committed to enhancing operational efficiency through improved processes, communication, and HR practices. Streamlining operations ensures that resources are used effectively and services are delivered efficiently. By aligning staff and fostering a culture of continuous improvement, JVS SoCal can better serve its clients and achieve its strategic goals.

Effective communication across all levels of the organization is crucial to maintaining transparency and accountability. Feedback from stakeholders highlights the need for better organizational accounting checks and balances to enhance operational efficiency.

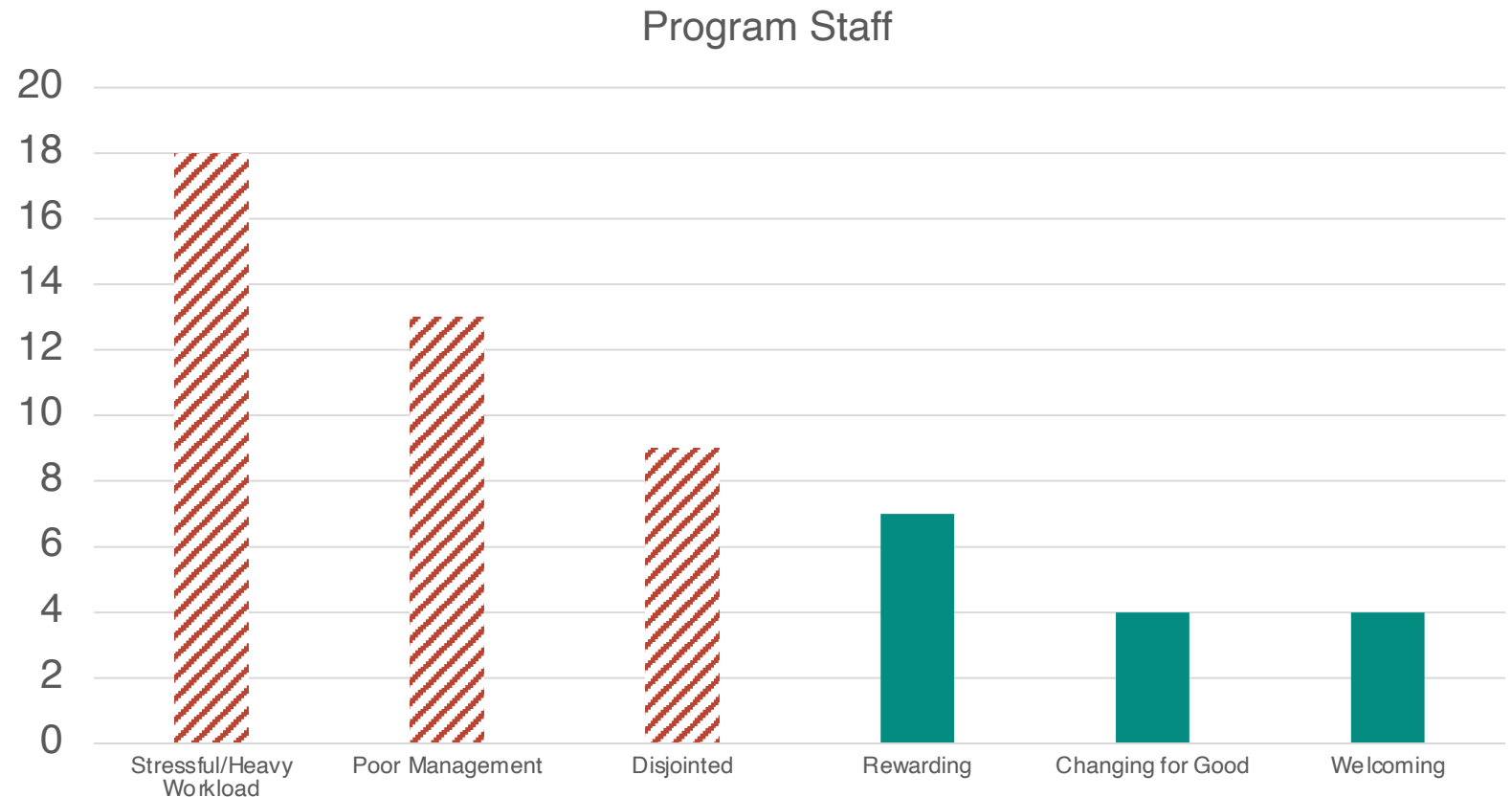
- ▶ “I don't have a way of assessing if they're on target or not on target.”
- ▶ “Obviously they need some organizational accounting checks and balances better than they've had in the past.”
- ▶ “I think it's looking at all the different lines of business that they have and how they could braid them together better—leverage each other instead of operating on dual [tracks].”
- ▶ “[The] cohorts of the different trainings... upon enrollment... it should be a full class every time... because again, the funding is there.”

8. Operational Efficiency

Strategic Considerations

- Maintaining good relationships with government funders, in particular, requires diligent processes
- High caseloads and multiple inefficiencies stretch the workforce thin at JVS SoCal, contributing to turnover
- Additional focus on streamlining JVS SoCal's operations and processes can both maximize impact and relieve staff

How would you describe the organizational culture of JVS SoCal? What does it feel like to work there?



9. Staff Retention and Development

Addressing challenges in staff retention is a priority for JVS SoCal. Investing in workforce development and enhancing HR practices are essential to maintaining a motivated and skilled team. Providing opportunities for professional growth and fostering a positive work environment helps to retain valuable employees.

By focusing on staff development, JVS SoCal ensures that it has a dedicated and capable workforce to drive its mission forward. Issues with employee turnover have been a concern, but the organization is working on creative solutions to improve staff satisfaction and retention .

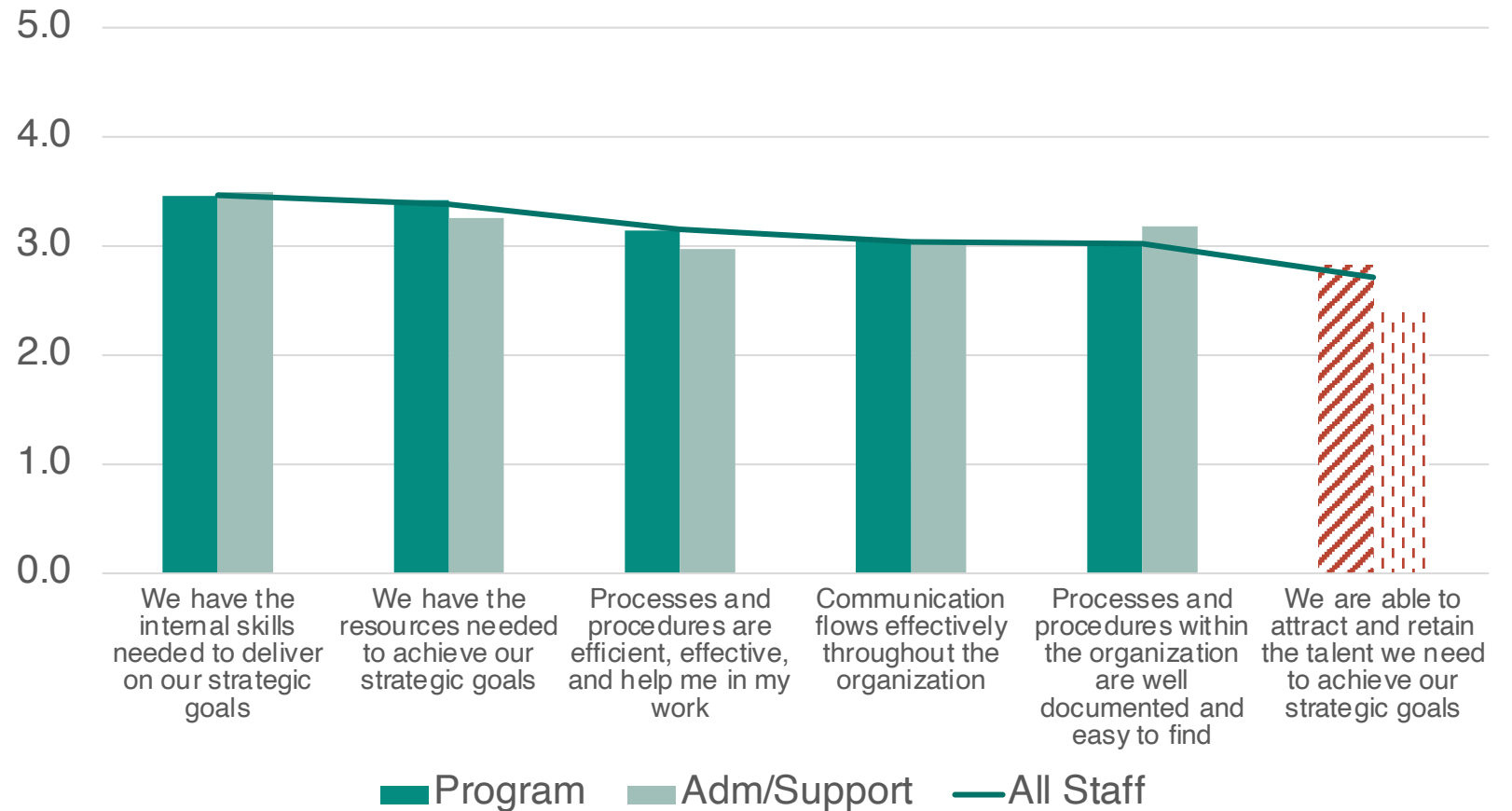
- ▶ “We're all struggling right now with employee retention and turnover, and that's just driven by the labor market everywhere. They've done a lot to try to help with that. But it's still a challenge and something that we're trying to tackle every day.”
- ▶ “I would think that... maybe coming up with some more creative strategies for handling staffing issues, because... we've had their staff come directly to us with complaints.”
- ▶ “Vacancies go a very long time without being backfilled. And I think it's something related to current policy and process, which we normally don't have with smaller nonprofits. They normally can fill vacancies pretty quickly.”

9. Staff Retention and Development

Strategic Considerations

- Turnover, though not unique to JVS SoCal, is a costly burden that holds the organization back from its true potential
- Getting a handle on what it will take to retain staff will boost the organization's effectiveness
- Pay isn't the only issue, and leadership trainings for mid-level management may relieve some of the strain in the system

Please rate your level of agreement with the following statements regarding JVS SoCal



10. Strategic Planning and Vision

Strategic planning is vital for aligning JVS SoCal's mission with its long-term goals. By fostering collaboration and addressing the balance between workgroups and the overall organization, JVS SoCal can adapt to future challenges and opportunities. A clear and cohesive strategic vision guides the organization's efforts and ensures that all stakeholders are working towards common objectives.

Continuous assessment and adjustment of the strategic plan will help JVS SoCal stay responsive and effective in a changing environment.

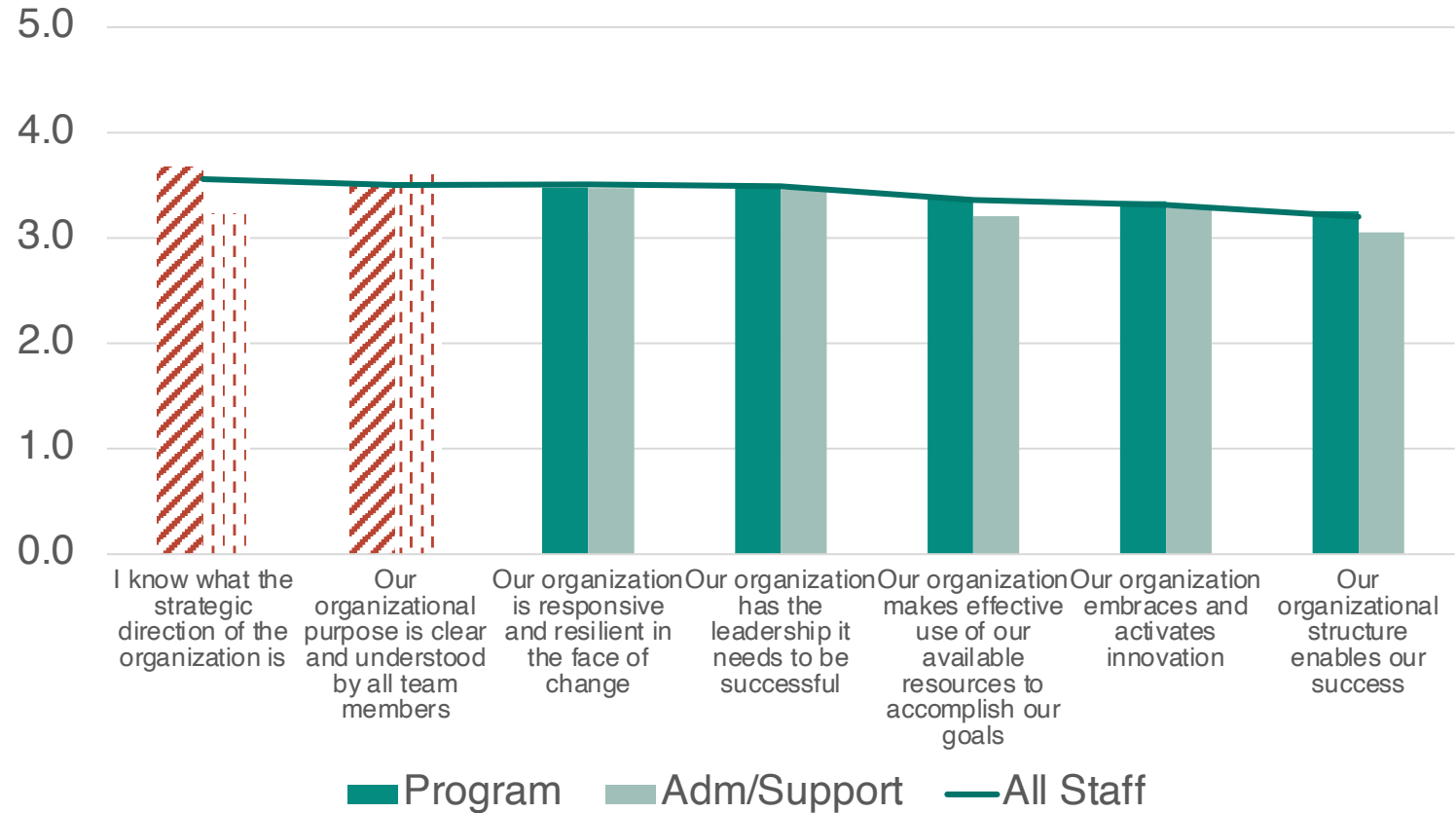
- ▶ “I see a real vision vision from the new leadership, and I see movement in a positive direction.”
- ▶ “I don't recall really what the strategic plan was.”
- ▶ “I don't know if I have a way of assessing if they're on target or not on target.”
- ▶ “I don't know that I know exactly what their strategic priorities are.”
- ▶ “Maybe defining clear goals and focusing on everything that has to do with those goals specifically... I think the new hot thing comes and they always run after it and deploy everything they got that [direction] and it makes them weak in other areas.”

10. Strategic Planning and Vision

Strategic Considerations

- JVS SoCal has been program-focused for many years, but may not have had the practice of truly pulling back and seeing a long-term view of opportunity
- Many stakeholders lack awareness of the organization’s current direction, but staff members are more clear
- This strategic planning process will provide critical focus

Please rate your level of agreement with each of the following statements about JVS SoCal as an organization



Overview of Strategic Perspectives

1. Community Engagement and Connections
2. Diversity, Equity, and Inclusion (DEI)
3. Leadership and Governance
4. Innovation and Adaptability
5. Financial Sustainability
6. Program Growth and Effectiveness
7. Brand Recognition and Marketing
8. Operational Efficiency
9. Staff Retention and Development
10. Strategic Planning and Vision

