

JCHE

JEWISH COMMUNITY
HOUSING FOR THE ELDERLY

Strategic Plan

FOR 2014 AND BEYOND



Strategic Plan

FOR 2014 AND BEYOND

From President/CEO and Board Chair

We are thrilled to share JCHE's 2014 Strategic Plan. JCHE builds on a rich 50-year history of excellence in providing service-enriched, supportive affordable housing for seniors. To go from strength to strength, we embarked on a strategic planning process that was inclusive, analytic and imaginative. We embrace our history and develop a forward-looking framework for how we think about and promote our work ahead. Driven by Jewish values that shape our approach, we provide a welcoming environment for all who walk through our doors.

We agreed that *aging in community*, our term for a full life of connection and purpose, would be the way we describe our sense of successful aging. We see community as an antidote to the bitter loneliness that can result from the isolation that often accompanies an unsupported aging process. Rather than aging only in reference to the past, our residents age in a way that involves shaping their own future.

We build on our strengths by pioneering new aspects of senior housing to enhance the experience, expand the reach of our work, and advance the conversation about *aging in community*. Because this work is so important, we will invest in the long-term financial, intellectual and communications infrastructure of the organization, assuring that we remain an industry leader.

JCHE's strategic plan comes at a critical time. The "graying" of society has been well-documented and much-ballyhooed. With so many baby boomers aging into their senior years and life expectancy so rapidly increasing, the reality of American and international society is shaped by a dramatic increase in the numbers, and percentage in the population, of elders. JCHE is well-positioned and enthusiastic about meeting the challenge of one of the most pressing issues of our day. We invite you to join us in making our vision a reality.

Bernard E. Kaplan
Board Chair

Amy Schectman
President/CEO



*From left: Board Chair Bernard E. Kaplan
and President/CEO Amy Schectman*



JCHE's Vision

All older adults have the opportunity to *age in community* - to live a full life of connection and purpose in a dynamic, supportive environment.

Our Mission

Inspired by Jewish values, JCHE welcomes seniors from all backgrounds and enables aging in communities of engagement, connection and purpose by:

- Providing superior housing that is broadly affordable
- Continually evolving support services to meet the needs of our diverse residents as they age
- Building connections and community within our walls and in our surrounding neighborhoods
- Promoting *aging in community* as a first choice

Our Values

Since our inception, JCHE has opened its doors to the broader community, welcoming seniors from all backgrounds while being driven by our Jewish values, which guide us to honor thy mother and father (seen as a collective enterprise), welcome the “stranger” as we were once strangers ourselves (including immigrants from many lands), and share across generations (*l’dor vador*). By providing a supportive environment for our community’s seniors, we help bring forward the wisdom they have accumulated over a life time, support their efforts to embrace life-long learning and growth, and engage in repairing the world (*tikkun olam*) to be sure all seniors have the basics for living with dignity.



“Aging is not lost youth but a new stage of opportunity and strength.” Betty Friedan

Our Foundation



We believe senior years are full of opportunity for happiness, growth and engagement. By providing well-designed, well-managed housing infused with opportunities and resources for exploration, learning and connection, we support our residents to thrive, not just live.

We are uniquely positioned to actualize this vision because of our active role as a developer, manager and service provider for all of our communities. This multi-pronged approach allows us to truly understand our residents' needs and interests and express them through all of our programs, services and professional practices.

A POINT OF INSPIRATION: HUMANITAS ROTTERDAM

JCHE is inspired by the Humanitas Communities, a network of “apartments for life” whose main goal is not to cure and care for seniors, but to create happiness. One of the main ways that Humanitas achieves this is by filling their ground floors with a variety of vibrant, community-centered uses to draw non-residents into their buildings, creating active community space and de-stigmatizing the “place where old people live.” Throughout our strategic planning process, JCHE has explored the ideas of creating a JCHE-version of this exciting and dynamic approach, one that fits our economic and social model but mirrors the vibrancy and appeal of the Rotterdam communities.

“Choose life” is a central tenet of Jewish philosophy... it’s about adding purpose and dignity to every moment. Thus the special “value add” of Jewish elder care is that we seek to add greater meaning, greater dignity, greater purpose and greater joy. We are at once the answer to people’s greatest fears and their greatest prayers. In doing so, we have created sacred institutions.

Rabbi Brad Hirshfield

Utilizing this holistic approach, our work will continue to:

- **Cover the fundamentals:** Maintain our properties to the highest standards, with on-site maintenance and emergency response in the buildings 24 hours/day, 365 days/year.
- **Support and advocate for our residents:** At the center of our resident support team are our Resident Service Coordinators (RSCs) who know each of our tenants and work to ensure that everyone has access to the services that they need. RSCs help residents connect with one another and build community, an essential part of maintaining independence.
- **Welcome people from all cultures:** Cultural and language competency is present throughout JCHE. We translate all-important documents into people’s native languages and we celebrate cultural differences through programs such as cultural cafes, performances and holiday gatherings.
- **Combat loneliness and isolation:** JCHE offers a framework for successful aging in community by offering opportunities for engagement through programs and services that promote safety, security and wellness.
- **Enable residents to choose their own paths:** Life at JCHE is filled with opportunities to try out new things or to build on life-long passions. One’s creativity may be unleashed through art, music, or dance; intellectual curiosity fulfilled through lectures, libraries and computer centers; and inner peace enhanced through participation in groups for support, spirituality, or even cultural integration.

Strategic Growth Initiatives

Expand our reach to serve more people.

We plan to both increase the number of apartments and broaden our definition of who will live in them. Through careful, strategic real estate development, we will enhance our ability to **meet the growing demand** from our waiting lists and devise new models and ways for future seniors to find our housing attractive. We also recognize that we can **broaden our mission to address availability gaps**: many middle-class seniors who wish to *age in community* have no affordable market options and some low-income special populations are underserved.

Pioneer new directions to enhance the experience.

We will lead the **integration of housing and health care** in the brave new post-Affordable Care Act world in ways that both offer improved outcomes for our residents and offer a long-term vision for efficiently providing for care. We will also make our walls more permeable—inviting the community in and offering our services outside—to both increase the vibrancy of the housing environments and to broaden our exposure in the community. In this way, the common areas in our developments will become **village centers**—hubs of exciting activity with enticing spaces and programs and energy.

Advance the conversation about successful aging.

The media and many industry leaders advance the notion of *aging in place* as somehow the gold standard for successful aging. Our research and experience demonstrates that in fact, *aging in community* leads to far better health outcomes and happier lives. Beyond simply providing the highest quality experience for our residents, we want to advance the notion of *aging in community* as the **first choice** image for healthy aging, through documentation, strategic communications and advocacy.

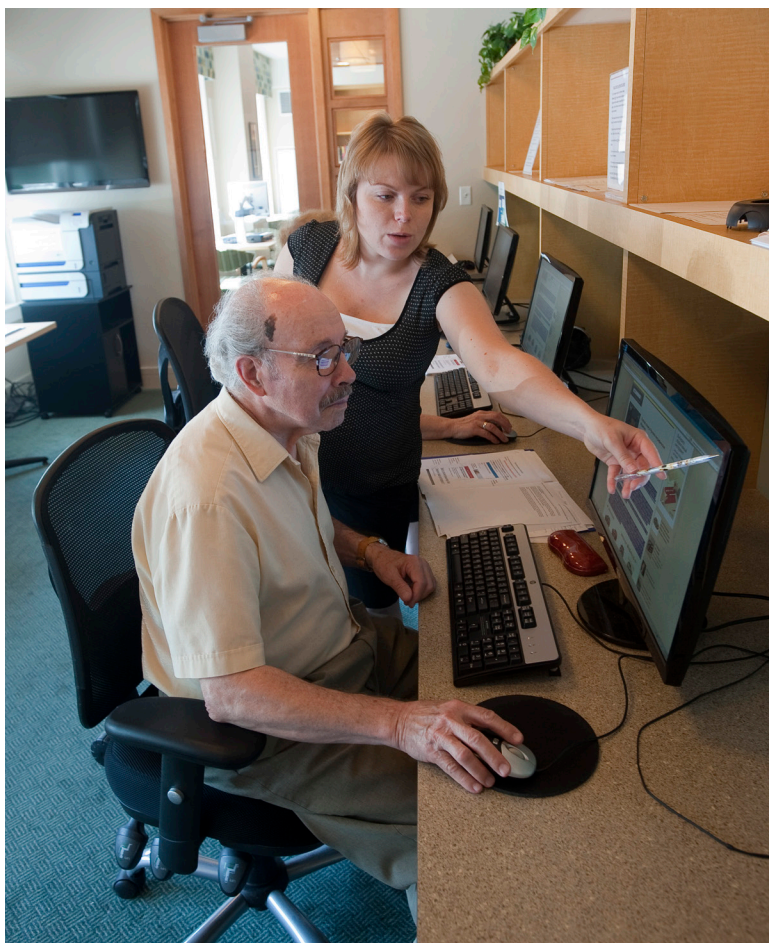


“Too often the tone of our discussions about the aging population takes on an apocalyptic turn.....as if we have created inexorably longer lives but are powerless to make the choices we need to if we are to reap the benefits.” Simon Tucker, Young Foundation Great Britain Report “One Hundred and Not Out: Resilience and Active Aging”

MEET THE GROWING NEED

According to the Pew Research Center on January 1, 2011 the oldest members of the baby boom generation celebrated their 65th birthday. In fact, 10,000 baby boomers reached age 65 on that day, and will continue to do so every day for the 19 years that follow. The aging of this huge cohort of Americans (26% of the total U.S. population are Baby Boomers) will dramatically change the composition of the country. Moreover, according to the U.S. Census Bureau, while in 2010, slightly more than 14% of the older population was 85 and older, by 2050, that proportion is expected to increase to more than 21%.

The JCHE waiting list confirms considerable and growing need. In 2013 and 2014, we had to actually close the waiting list for Genesis and Shillman affordable units, as the wait is too long. For some units at Golda and Coleman, the wait is too long to estimate. The wait for even the small efficiency units in Brighton is at least 2-3 years, despite the fact that most people wait to apply until they have very immediate needs for our housing.



To enhance our ability to meet the demand from our waiting lists and devise models and ways for future seniors to find our housing attractive, we will:

- Reinforce the existing developments by acquiring adjacent parcels where possible.
- Keep JCHE as the first choice for our existing waiting list by affirmatively marketing our communities to waiting list members and families. If people turn down offers of housing, we will follow up to understand the holdbacks and try to address patterns found.
- Develop new models to attract moderate-income seniors.
- Understand what will make our communities desirable in the future by engaging focus groups and/or other methods of inquiry to define affinity groups or features that will attract baby boomers—perhaps in collaboration with private developers or other non-profits.

“If it’s one thing that marks JCHE, it is huge amounts of love and compassion.”

Barry Shrage, President,
Combined Jewish Philanthropies

BROADEN OUR TARGET POPULATION

JCHE will never abandon its core mission of serving low-income seniors and we will always seek opportunities to provide subsidized housing. We will also remain steadfast in wanting to open our doors to everyone in the community. We do want to be certain that we always meet the needs of Jewish seniors by locating in places they want to live and understanding the core needs of the Jewish community.

According to Combined Jewish Philanthropy's (CJP's) most recent Demographic Study, 7% of Boston-area Jewish households live in poverty. Since seniors represent the highest concentration of poverty of any demographic group in the nation, we can extrapolate that the number of Jewish seniors living in poverty is probably significantly higher. As we continue to be a leader in subsidized housing, we will continue to identify gaps in the marketplace and broaden our definition of target population.

The CJP Demographic Study found that the financial resources of adults also tend to decline as they age and retire. Nearly 30% of Jews aged 55 or older stated that they had no or little confidence in their ability to finance their retirement. This points to an additional important gap in housing affordability—**moderate-income seniors** who do not qualify for government-supported housing and cannot afford senior housing with support services.



- JCHE will expand its reach to provide supportive, community-based housing that is affordable to moderate-income seniors. We will need to find creative ways to serve this important population, since no government subsidies will reach them.
- We will include **other underserved seniors** such as those identified by social service agencies, and ensure that we are prepared to meet the needs of such new residents and fully integrate them within our “village” communities by ascertaining additional support needs and finding resources to support them.

LEAD HOUSING/HEALTH INTEGRATION

JCHE believes that combining housing and health care in a more coordinated way could yield two important advantages: first, better outcomes for seniors in the form of more stable independent housing and better overall health; and second, savings for both housing and health care funding streams. The traditional approach to serving seniors has been to draw a clear separation between housing and health care providers. This is most obvious in federal funding streams, which make providers eligible for one category of funding or the other. By partnering with health care organizations to demonstrate synergy, we can change this paradigm.

JCHE's history of supportive housing and the density of seniors at our sites who rely on public health care resources make us ideally positioned to lead the integration of these two systems. We will pioneer an integrated housing/health care model that both offers improved outcomes for our residents and offers a long-term vision for efficiently providing care.

- To provide leadership in this area, JCHE will develop groundbreaking partnerships with Senior Care Options (SCOs), Accountable Care Organizations (ACOs) and Program of All-Inclusive Care for the Elderly (PACE) programs. Health care reform and the subsequent proliferation of these programs means that we are at a pivotal moment where the path of senior care is growing and changing rapidly. JCHE will seize this moment by proactively seeking out SCOs, ACOs and PACE programs that are interested in partnering to test out the opportunities for enhanced collaboration between health care and housing provision.

"I have reached an age when, if someone tells me to wear socks, I don't have to." Albert Einstein



CREATING VILLAGE CENTERS

JCHE buildings have a wealth of activities, services, and space to offer our surrounding communities. Increased and varied activities add to the vibrancy of our residents' lives and help to make JCHE "a great place to live" and not "just a place for old people." We will make our walls more permeable, both inviting the community in and offering our services outside. In this way the common areas in our developments will become **village centers** - hubs of exciting activity with enticing spaces and programs and energy.

To redefine JCHE communities as Village Centers, JCHE will:

- **Assess existing, and design into new buildings, space for new uses with broader appeal:**
 - ◇ Partner with local businesses, such as restaurants, to locate within JCHE to soften the walls between JCHE and the neighborhood.
 - ◇ Identify leasable space for services that can serve both our residents and neighborhood, i.e. cleaners, variety store, childcare, etc.
 - ◇ Connect our under-utilized community space with neighborhood needs for community meetings, art festivals and other neighborhood-based events.
- **Share resources of JCHE communities:** We will explore a pilot of "membership" to serve the needs of individuals living beyond our walls that will leverage our resources and help actualize our village center philosophy that will leverage these resources and help actualize our village center philosophy.



Everyday we see how our residents benefit from the many opportunities to learn, to connect, and actively participate with each other.

JCHE will focus on expanding and creating new activities:

- **Formalize JCHE as a center for lifelong learning:** JCHE currently provides opportunities for lifelong learning. Through the creation/expansion of formal partnerships with institutions of higher learning, JCHE will reinforce and expand learning opportunities as a value in our work and an easily accessible resource.
- **Become formal advisors in senior service delivery:** We will explore providing professional consulting to others, running training institutes, and actually staffing services at other communities.
- **Seek opportunities to be a testing ground for new "gray" technology:** Technology can be a central piece of keeping seniors connected within our communities and to their families and friends. JCHE will investigate potential partners interested in pioneering technologies for our residents.

"Do not deprive me of my age. I have earned it."

May Sarton,
The Poet and the Donkey: A Novel

MAKE AGING IN COMMUNITY THE FIRST CHOICE

Overwhelmingly, research and experience demonstrates that *aging in community* leads to far better health outcomes and happier lives. The U.S. Department of Health and Human Services found that supportive, communal living adds five years to an average lifespan. Numerous studies from academic institutions conclude that chronic loneliness should be recognized as a serious health risk factor affecting blood pressure, immune system functioning and ability to perform Activities of Daily Living (ADLs). And JCHE has found that living with us postpones or avoids nursing home care for at least 5 years, on average.

Despite overwhelming evidence of the benefits of supportive senior housing, people make decisions based on emotions and beliefs. There's an overwhelming sense in this country that *aging in place*, meaning remaining in one's private home, is the image of success. Yet we know that the majority of baby boomers live in single-family homes in suburbia and that one third of them live alone with no family nearby. We also know that, on average, baby boomers will live nine years beyond their ability to drive and that according to Fidelity Investments, on average their retirement savings will fall 44% short of need. We know that housing cost burdens increase with age and that one fourth of U.S. households 85+ pay at least one half their income for housing leaving insufficient funds for medicine, food and other basic necessities. JCHE fears that the idealized aging in place model not only opens the door to isolation and loneliness, but also will be financially and socially unsustainable for many people who will live much longer than they imagined.

- Beyond simply providing the highest quality experience for our residents, we will advance the notion of *aging in community* as the **first choice** image for healthy aging, through documentation, strategic communications and advocacy.



“[Remaining in one’s home] is seen as success in American society... Even though living alone in old age...brings loneliness, isolation and fear, nearly 90% of people say it is what they want. This is both foolish and unsustainable. We can do better. Aging is, and always has been, a team sport. The myth of ‘aging in place’ harms people by defining the decision to share one’s daily life with others as failure.” Dr. Bill Thomas

Strategic Infrastructure Initiatives

Become a learning organization

JCHE will operate as reflective practitioners and we will devise a system for ongoing **program and impact evaluation**. This will allow us to document our effectiveness and strengthen our programs. It will also be an important tool in attracting private investment in our enterprise. As part of the work, we will create vehicles for regularly discussing and learning from our experiences.

Invigorate our image

We will update the way we present JCHE to match the excitement we feel about our mission, vision and work. **Branding and marketing** can enhance the way we are perceived in the community and extend the reach of our passion about *aging in community*.

Finance and development

JCHE has solid financial footing and a sophisticated financial management system. To meet our ambitious goals set forth in this plan, we will work to increase our revenue base by capitalizing on the asset value of our properties, building a multi-tiered development program, and exploring creative financing/revenue opportunities. That way we can assure our continued stability and allow for investments to foster growth.



“By 2022, more than half of the federal budget will be going to Social Security, Medicare, and the non-child portion of Medicaid, up from 11% in 1960, according to an Urban Institute study. Meantime, the growth of these programs will continue to crowd out spending on infrastructure, education and research — the very kinds of investments that would help ensure prosperity for future generations.”

The Next America, by Paul Taylor

BECOME A LEARNING ORGANIZATION

“The afternoon knows what the morning never suspected.” Robert Frost

Reflective practice is defined as “the capacity to reflect on action so as to engage in a process of continuous learning.” That is one of JCHE’s organizational aspirations. We have a tradition of bringing in speakers to keep up with developments in the field, sending people to conferences to bring back new ideas and share our experiences, seeking and securing grants to allow broad-level organizational education and creating communities of practice to share on-the-ground best practices and jointly problem solve. We will build on this foundation and explicitly expand opportunities to improve our practice by learning together.

To be fully effective at this task and to allow us to use our experiences to advance the broader conversation about *aging in community*, we will develop and fund a research and evaluation program to establish and track the measurable outcomes of our work. Since this is not an existing capacity, JCHE will develop a plan to identify the appropriate metrics and means for collecting and interpreting their meaning on an ongoing basis. The plan will need to include anticipated outcomes and a way to fund the capacity. JCHE may want to seek a partner agency with expertise in research and program evaluation.

Priorities for this new capacity:

- Document the impact of our philosophy and practices regarding *aging in community*
- Create an environment of reflective practice by using the data to inform and impact policies, practices and possibilities
- Keep current on national research about *aging in community*



BRANDING TO REFLECT OUR FUTURE



JCHE is a very strong organization with an enviable reputation amongst those with whom we have direct contact, but is not as well known in the broader community. Furthermore, our name and branding reflects primarily the historic mission and function. The launching of this strategic plan offers an opportunity to invigorate our image to match the excitement we feel about our mission, vision and work.

Branding and marketing can enhance the way we are perceived and extend the reach of our passion about aging in community. To devise a multi-pronged approach with a focus on messaging and language to align with our new vision and mission, we will:

- Develop a marketing strategy. We will maintain our appeal and position ourselves as the **first choice** for those eligible for our communities. JCHE has always had a robust waiting list, but we can never be sanguine about the need to keep our properties vibrant and desirable.
 - ◇ Pro-actively market ourselves to those on the waiting list and those who might benefit from our brand of *aging in community*.
 - ◇ Conduct an outreach campaign through synagogues, public forums and hearings, conference presentations and awards, community groups, media coverage and other vehicles.
- Update the organization's brand and possibly our name to better express our stance as an energetic, dynamic, inspiring, future-oriented and proactive agency.

"I saw my mother spend the last years of her life at our lovely family home—but those were years of bitter loneliness. I would never put my children in the position of watching me become sad and lonely. Here, I've got it all—friends, safety, social activity, intellectual stimulation & financial peace of mind. I'm not a worry or a burden."

Edith Gillette, resident of Golda Meir House

FINANCE AND DEVELOPMENT

JCHE has a commitment to continue the highest level of services without compromise. We will continue prudent fiscal management practices and broaden our revenue base to allow crucial investments in our long-term stability.

To increase revenue opportunities, we will:

- Formulate an advancement strategy to draw in additional philanthropy. We will build a multi-tiered development program that both widens and deepens our donor pool and draws in investment partners for new ventures.
 - ◇ Develop a Case for Giving. JCHE has a strong, compelling and a unique model that can change the way people age for the better. By articulating it clearly, we offer a vision that entices philanthropic investing.
 - ◇ Prepare materials for general fundraising/communications and prepare for possible capital campaigns for real estate projects.
 - ◇ Focus on multiple streams of revenue, continuing our strong annual event while adding additional gatherings and securing multi-year gifts from loyal donors.
- Generate cash from development of new properties and re-financing old ones. Capturing built-up equity in long-held properties, developer's fees for new building and modernization, and generating surplus cash from operations all can yield sources of flexible funds for investments in JCHE endeavors.
- Pursue business lines that yield a profit.
- Explore creative revenue sources. Periodically, new financing and revenue vehicles become available and we will seize upon these opportunities, regularly scanning the environment to understand emerging tools.



FINANCE AND DEVELOPMENT

The goal of generating new revenue is to structure a safety net for operations and to invest in building the JCHE of the future. While we can seed these funds immediately, we will need to raise significant new dollars to secure each of these funds at an appropriate level for agency stability and growth.

To ensure JCHE's long-term financial viability, we will:

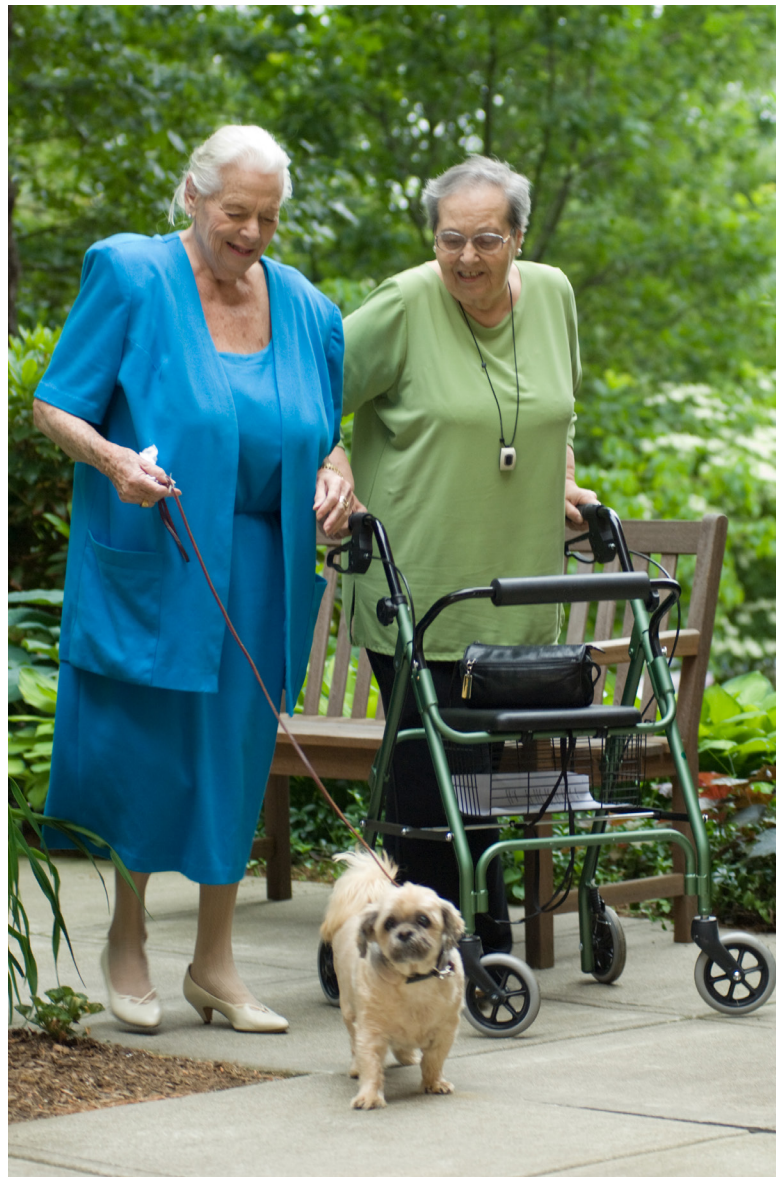
- **Create a safety net for current operations:** We will begin funding reserves to protect against massive disruptions. The first steps will include:
 - ◇ Creation of an operating reserve equal to 2-3 months of operating expenses with a goal of increasing the reserve to 6 months when feasible
 - ◇ Expansion of the program/service reserve fund to cover one year of service needs—so we fundraise in any given year for the following year's programs
- **Create an agency investment fund to support the agency as a whole:** In order to expand our reach and fulfill our potential, JCHE will need seed capital in two areas:
 - ◇ Real estate development and redevelopment
 - Staff a professional real estate unit
 - Fund pre-development for new projects, early exploration for more sites and modernization projects
 - Set aside money for future equity contributions
 - ◇ Support for new initiatives
 - New venture start-up capital
 - New fund for employee professional development

Thomas Friedman, The New York Times, arguing that the need for nursing home funding will squeeze out all community-building foreign aid:

“... the trade-offs we'll have to make between nursing homes in America and nursery schools in Afghanistan. Unless we get some sustained economic growth, Afghanistan will lose.”

Archbishop Desmond Tutu describes an African notion called “Ubuntu”:

“It is to say, ‘My humanity is caught up, is inextricably bound up, in yours.’ It is not, ‘I think therefore I am.’ It says rather: ‘I am human because I belong. I participate, I share.’”



How We Got Here

The strategic planning process was a collaborative effort amongst board and staff members. We studied together, reached out to learn about best practices around the world, and discussed and debated key tenets of our approach. Leadership for the effort came from a Board Strategic Planning Committee, which empowered 4 board-staff working groups to articulate specific elements of the plan. We were ably and effectively guided by David Trietsch, CJP's Leadership Development Institute's Director.

Strategic Planning Committee

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Amy Gorin, Board
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Rebekah Kaufman, Board
Paul Rosenberg, Board
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Strategic Planning Task Forces

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