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&CHILD**

EVERY STEP OF THE WAY.

# **CLIENT CENTRICITY & ORGANIZATIONAL CHANGE**

## **AJFCA CONFERENCE 2011**

MAY 15, 2011 | CALGARY, ALBERTA





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# JOURNEY TO DATE

*Jewish Family & Child supports the healthy development of individuals, children, families, and communities through prevention, protection, counselling, education and advocacy services, within the context of Jewish values.*

**IN 2008, JF&CS' STAFF AND BOARD OF DIRECTORS DEVELOPED AND ENDORSED A STRATEGIC VISION THAT GREW OUT OF THE MISSION:**

## **THE VISION INCLUDES:**

- A dynamic, vital environment that honours its mission through best practice, evaluation and research;
- Impact that is effectively measured, felt and communicated;
- Stakeholders are treated in a respectful and effective manner;
- A consistently high level of staff commitment and skill development;
- Services that are client centred.

CLIENT FIRST

RENEWAL

IMPACT

SUSTAINABILITY

1

2

3

4

5

6

CLIENT CENTRICITY

ENGAGEMENT AND RESOURCE OPTIMIZATION

INFRASTRUCTURE RENEWAL

COMMUNITY PRESENCE

ADVOCACY, PARTNERSHIP & FUND RAISING

MEASUREMENT/ RESEARCH AND EVALUATION

*how to place the client at the centre of everything we do to shape our structure, our processes and all our touch points...*

*enlisting all our staff in ensuring that we leverage our resources effectively and efficiently...*

*finding ways to enhance our infrastructure and our technology in order to serve our clients better and make better use of our resources...*

*building our profile in the community we serve and ensuring we reach all segments of the community...*

*ensuring that the agency has the funds required to carry out its mandate in line with its values...*

*determining objectively how effective our services are and how to enhance them...*

*We need to refocus from ourselves and what we need in order to focus on our clients and what they need.*

*We must ensure that "every step of the way" is not merely aspirational. It is a standard of practice.*

*Our clients' needs must determine the nature of our support rather than the assigned service location, program or staff member.*

*How do we optimize our resources and manage our processes and systems to achieve our vision of client centricity?*

*How do we ensure that systems are harmonious, contributing to synergy rather than silos? Resources, processes and systems include intake, case flow, agency programs, training, financial systems, staff supervision etc.*

*Administrative support, information technology, human resources, continuous quality improvement and other elements of infrastructure need to be enhanced and properly integrated.*

*This will support our client centric vision, facilitate the agility of our responses and provide a solid platform for change.*

*Our profile must be enhanced with all stakeholders – including all segments the Jewish community, the public at large, government, funders and donors.*

*Our presence in the community will affirm the leadership role that we have and will make us the first point of reference within the community for all aspects of our mandate.*

*It will be essential that we advocate for the appropriate support of our services with government and other stakeholders.*

*We need a fund raising strategy together with revenue generation from fee-based programs.*

*We will have to find new ways to partner with agencies such United Jewish Appeal to support initiatives*

*Client centricity, clinical excellence and best practices rely on measurably effective services, client satisfaction and a current understanding of clinical theory, research and practice.*

*We must leverage our relationship with academic and clinical partners to elevate the standard, quality and currency of service delivery*



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# WHY CHANGE?

1. Create a seamless experience for clients
2. Reduce Silos
3. Respond to client need – what, where, when, and how
4. Build an environment that constantly challenges us to:
  - think critically
  - use evidence-based practices
  - manage accountabilities



# FEATURES OF THE FRAMEWORK

- **Comprehensive Intake Process**
  - includes: outreach, referral, demographics, deeper initial assessment & some crisis management
  
- **Case Management Approach**
  - A collaborative process of assessment, planning, facilitation and advocacy to promote positive outcomes



# SOME DEFINITIONS

## **Two Key Roles:**

### **Client Service Lead (CSL) & Client Service Provider (CSP)**

**CSL's** provide continuous case management for clients – bringing all appropriate resources to bear when creating a client service plan

**CSP's** carry mixed direct service case loads based on their qualifications – they can work on a variety of Practice Teams, with a variety of CSL's and other CSP's, as appropriate

**CSL** and **CSP** are ideally distinct roles



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# COMMUNITIES OF PRACTICE

Communities of Practice are developed as collaborative endeavors geared to a specific knowledge or competency designed to enhance the capabilities of the individual participants

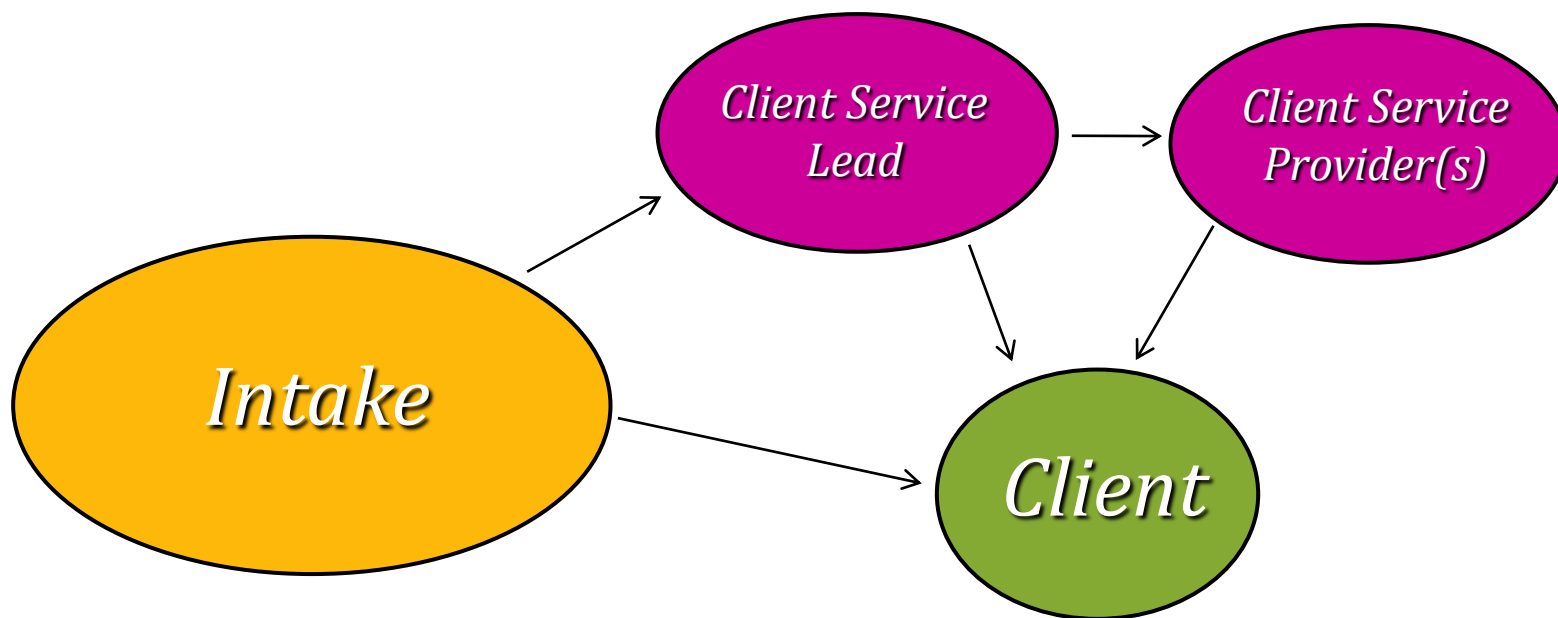
**Adult Mental Health**  
**Children's Mental Health**  
**High Conflict Families**  
**Homeless Youth**  
**Woman Abuse, etc.**



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# ROLES (AS THEY RELATE TO CLIENTS)





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# ACCOMPLISHMENTS TO DATE

## **Evaluation and Research:**

Establishment of a leadership Ph.D position in research and quality assurance  
The evaluation of our Supplementary Financial Assistance Program;  
Research on the efficacy of our children's mental health centre;  
The implementation of the My Outcomes Pilot Project (Scott Miller).

## **Infrastructure Renewal and Resource Optimization:**

Newly renovated offices at 2 of our 4 locations  
New IT system – developed and implemented  
New phone systems  
3<sup>rd</sup> office being planned for 2012 - located where the Jewish community is moving north  
Caseload/Workload resource study in process

# ACCOMPLISHMENTS TO DATE



EVERY STEP OF THE WAY.

## **Fundraising and Communications:**

Major donations assisted with the renovations of the two new offices  
Donations were received for woman abuse, adult mental health, camp, hospice, and more

Raiser's Edge (IT Fundraising system) was purchased and implemented

## **Community Presence:**

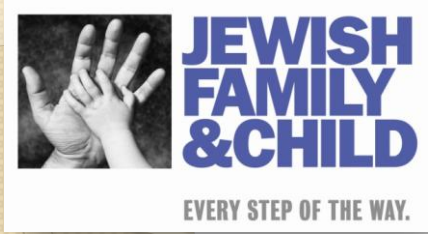
Focus groups took place for both clients and stakeholders;

The Downtown Renewal Committee was founded;

An environmental scan and needs assessment was completed for planning for our north office;

## **Advocacy:**

has been on top of the agenda for our Board, Management and staff teams  
--MPP Briefing Day at the Ontario Legislature 2010 and 2011



# ENGAGEMENT PROCESS





# NEXT STEPS

Postings for new positions;

Training programs for CSLs and CSPA to be developed;

Reorganizational committees continue to meet and plan;

Caseload/Workload resource study to be completed;

Downtown renewal ongoing;

Evaluation and research and the My Outcomes Project continue;

IT implementation;

Advocacy , fundraising, communication and collaborative efforts continue