Resiliency & Response:
Responding to a Pandemic through Virtual Service Delivery Models

Lessons from Jewish Family Service
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Chief Operating Officer
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• Professional Experience
  • Chief Operating Officer – Jewish Family Service
  • Chief Executive Officer – TIRR Memorial Hermann
  • Chief Operating Officer – Schwab Rehabilitation Hospital

• Education
  • Bachelors of Arts, Psychology – Washington University
  • Masters of Social Work – The Brown School, Washington University
Agency Overview

- 107 year history
  - Beneficiary of the Jewish Federation of Great Houston
  - Beneficiary of the United Way of Greater Houston
- $7.5 million/year budget
- About 57 FTEs
  - About 68 employees

Main service delivery areas include:
- Behavioral & Mental Health Services
- Disability Services
- Case Management
  - Seniors
  - Holocaust Survivors
  - Financial Aid
  - Disaster Case Management
- Employment Services
Leadership
Leadership Lessons: Assessing Risk

Assess Internal Vulnerabilities
• Functions that have only a single incumbent
• Functions that require on-site action
• Functions that are essential to business continuity
  • Examples include: payroll, accounts receivable, accounts payable

Assess External Vulnerabilities
• Access to cash for business continuity
  • Days of Cash on Hand
• Revenue streams
  • Government
  • Private foundations, donors
  • Program Fees
  • Insurance Companies
Conceptualizing the Categories of Work

- Respond
- Return
- Reinvent
# Leadership Lessons

## Build-in Structure
- Create regular, frequent meeting times
  - C-Suite Meeting every morning at 8:00 AM
  - Daily email to staff

## Making the Most of Your Team
- Focus on meaningful work
- Do what you can with what you have where you are

## Prioritize
- Prioritize what needs to be done first and what can wait
  - Business continuity
  - Client services

## Create Norms for the New Workplace
- Technology needs to become our new “site of service” – using it effectively is not an option
- Client service techniques and modalities need to be adapted for virtual use

## Track Expenses
- From the very beginning keep track of any new expenses or lost revenue due to the situation
- This could lay the foundation for a Business Interruption claim or for donor/funder reports
• It’s not a time to tread water
• There may be opportunities to move certain projects forward
  o Launched website re-design that had been planned prior to COVID-19
• Continued to interview and hire staff where needed
  o Examples included CFO, therapist and summer intern
Leadership Lessons

“I would say now is the time to think outside of the box and not be afraid to try. People are more forgiving and appreciate the effort so if it doesn't work it is not a huge a failure.”

- JFS Department Head
Governance
Governance

Established a COVID-19 Financial Task Force
- Met weekly in the beginning then moved to biweekly

BOARD VIRTUAL HAPPY HOURS
- Focus on Staying Connected
- Provide social outlet
- Can practice using new technologies without the pressure of an agenda

BYLAWS REVIEW
- Review and modify bylaws as needed to allow for meetings to take via teleconferencing

COACHING
- Teaching the board to effectively use the technology

MATCH THE MODALITY
- Restructure board meeting and agenda to fit the virtual setting more effectively
- Create systems for participation, voting and interaction
**Scenario Planning**

| Multiple Redundancies | • All systems and functions need to have multiple redundancies  
|                        | • Ask, “What if?” at least 3 times  
|                        | • Systems/functions at risk – are there things only one person does  
|                        | • Cross-training |

| Short-term, medium-term and long-term planning | • Need to focus on getting through today and simultaneously planning for the next series of “what-if’s”  
|                                               | • Looking through a microscope and looking through a telescope at the same time |

| COVID-19 Financial Task Force | • Met weekly from the beginning  
|                               | • Included: CEO, COO/CFO, Board Chair, Chair of the Administrative Services Committee, Treasurer, Board Secretary  
|                               | • Created most likely scenarios & reviewed potential impact in all areas of operation |
Service Delivery

Transitioning to New Models of Care
Program Design

Goal:
Maintain current operations as normally as possible

Counseling
- All sessions moved to HIPAA protected Zoom
- Play therapy with children adapted so that the therapist coached parents virtually through Zoom
- Created time-limited situation specific programs tailored to the current situation
  - Added 3 new support groups for COVID-19
    - Parents Support Group
    - Adult Support Group
    - Adolescent Support Group

Employment
- Moved services to Zoom
- Re-tooling program to meet the needs of the “new” unemployed
- Focusing on ways to support overcoming the “digital divide”

Case Management
- All sessions moved to HIPAA protected Zoom
- Created new delivery systems for financial aid distribution

Volunteers
- Check-In phone calls
- Caring Cards
- Food Donations

Disability Services
- Deliver work to client homes
- Zoom
- Facetime
- Facebook Live
  - Exercise group
  - Weekly Shabbat get together
- Telephone
Program Evaluation

- Providing services remotely changes the modality
- Can’t assume that in person techniques perform similarly in remote modalities
- Need to monitor effectiveness of programs
- Feedback from counseling clients is essential to making real-time adjustments
Voices of our Clients

• “Client is thrilled with her treasure box! Thank you.....Thank you guys, really. It means a lot to us and especially to client.” [Family member of Disability Services Client]

• “I miss being in your office – that was my safe place” [counseling client]
Creating New Service Delivery Models

- Start with the presumption that the clients need to be cared for
- Modify/create new service delivery modalities
- Train/support staff in adopting the new models of care
Operational Challenges

- Telephones
- Computers
- Webcams
- Voicemail
- Payment processes for clients
- Accounts Payable
- Accounts Receivable
- Audit
Operational Changes: Finance

- Electronic Funds Transfers (EFT)
- SBA Loan – Payroll Protection Program (PPP)
- Line of Credit with the bank
- Expanding on-line bill payment options
Human Resources
Culture Eats
Strategy for Lunch

Keeping the team connected
Virtual Department Meetings
Virtual All Staff Meetings

Flexibility is key

Find meaningful work for everyone

Employees can’t function if they are not cared for

Emotional health of the staff is key to long-term success

Need to provide them tools appropriate for their new work environment and the support to learn how to use them

Communicate, communicate, communicate
Daily message to all staff and board
Clarifying Policies Related to the Pandemic

Situation is changing rapidly and science is unclear so you need to find an anchor for your decision making.

Define the values that will guide decision making.

Choose a reference point for data that will inform decision making.
Employee Engagement

- Staff “Check-In” survey sent May 5, 2020 with plans to repeat in a month to monitor staff reactions
Voices of Our Staff

• thank you for all of the support!!
• Your doing a good job with a situation that was unimaginable 2 months ago
• Thank you so much for all of your hard work in holding not just the community up--which you and all of the staff are accustomed to doing--but holding your staff up during this uncertain time.
• I feel that the leadership has the employees best interest at heart and has shown that in many ways and given those who normally see clients, the tools necessary to still offer our services to those in need and not miss a beat.
• JFS's positive treatment of its staff and flexibility at this difficult time has not gone unnoticed by the families and friends of its employees--you are deeply appreciated!
Core Competencies in the New World
Changed Expectations for Emerging Workforce

- **Resiliency**
- **Flexibility**
  - "All hands on deck" mentality
  - The agency’s work is my work
- **Adaptability**
  - Current climate is exacerbating the digital divide. Access to employment and essential services impaired for those without a computer and access to reliable internet.
- **Proficiency with remote work and technology that assist**
- **Ability to build and manage teams remotely**
Build Skills That Help Employees Respond to Change

EXPAND THE ABILITY TO OPERATE IN A FULLY DIGITAL ENVIRONMENT

DEVELOP COGNITIVE SKILLS TO ENSURE THAT CRITICAL PLAYERS CAN RESPOND THE NEED FOR REDESIGN AND INNOVATION

STRENGTHEN THE SOCIAL AND EMOTIONAL SKILLS TO ENSURE EFFECTIVE COLLABORATION

BUILD ADAPTABILITY AND RESILIENCE SKILLS TO THRIVE DURING AN EVOLVING BUSINESS SITUATION

Trends:
• Shift to working remotely
• In 2017, the McKinsey Global Institute estimated that 14 % of the global workforce would have to switch occupations or acquire new skills by 2030 because of automation and artificial intelligence.
• In a recent McKinsey Global Survey, 87% of executives said they were experiencing skill gaps in the workforce or expected them within a few years. But less than half of respondents had a clear sense of how to address the problem.
• COVID is accelerating these trends
Find Meaningful Ways to Engage Volunteers

- Check-in calls
- COVID Cards of Caring
- Food & Supplies Drive
Communication Strategy
Communication

Weekly e-newsletter
- Increased frequency from 1 to 2 times per week

Social Media
- Facebook
- Twitter

Website - Dedicated page to COVID-19 response and resources
- Care for your Coronavirus anxiety toolkit
- Just for kids: A comics exploring the new coronavirus
- Talking to Children About Tragedies & Other News Events

Articles in community newspapers
Questions & Contact Information

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Resources

- **eJewish Philanthropy**
  “How Scenario Planning Can Help Us Prepare for a Post-Covid Jewish Community”

- **Wallace Foundation**

- **Central Conference of American Rabbis**
  CCAR/URJ Guidelines on Values-Based Decision Making: Returning to In-Person Gatherings During the COVID-19 Pandemic

- **McKinsey & Company**
  “To emerge stronger from the COVID-19 crisis, companies should start reskilling their workforces now”