

# Building Jewish Community Together

## Report and Recommendations of the Strategic Planning Committee

Jewish Federation of  
Central Massachusetts

Facilitated by Andrew Paller  
United Jewish Communities  
UJC Consulting

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## Executive Summary

The Jewish Federation of Central Massachusetts has a long-standing commitment to take care of Jews in need locally and around the world, and a nearly sixty year history of success with this mission. We want our young people to grow up to value the Jewish ideals and traditions that mean so much to us and have meant so much to our ancestors. Yet we are bombarded with changes that threaten our ability to accomplish these goals. The region's Jewish population has changed significantly. Perhaps the most significant demographic trend involves the growth of a younger, relatively affluent Jewish population in the Westboro area, accompanied by a decrease and aging of the Worcester Jewish population and a more modest growth of Jews living in the many other towns surrounding Worcester.

In addition, globalization, mobility, geographic dispersion, technology, communication and the Internet have changed the way we live. A growing move away from communal structures toward a radical individualism pervades our society. Our young people are subject to multiple influences outside of the family and offered many options and opportunities. At the same time, the world of Jewish giving and volunteering also has changed, making it more difficult to respond to these challenges. Large, prestigious secular charities now compete for Jews as givers and as leaders, creating a much more competitive environment for the Jewish dollar. For those who continue to give Jewishly, many of the larger donors want more direct control over their philanthropy, to tailor projects to meet their interests. It is becoming harder and harder to raise the funds to support the basic infrastructure of Jewish life.

In June 2005 the Jewish Federation initiated this strategic planning process to develop a more systematic assessment of community needs and dynamics, to identify the key issues the community should tackle in the next three to five years given the significant challenges and limited staff/volunteer time available, to clarify the roles Federation should play in addressing those issues, and to create a well developed action plan for the next five-year period. Working with an outside United Jewish Communities consultant, the Strategic Planning Committee reached out for broad input through interviews, a Leadership Retreat, an on-line community survey and consultation with Federation, agency and synagogue leadership. In total, hundreds of people were consulted.

The plan is based on a vision of the future where:

**Jewish identity is strong, with the Jewish community recognized as active, inclusive and welcoming** for all Jews.

There is a landscape of strong institutions with an **established culture of collaboration and communication.**

There is a strong sense of **connection and responsibility for Jews wherever they live**, and a **culture of ownership and communal responsibility** where the overwhelming majority of Jewish community members are inspired to contribute time and financial resources in relation to their ability.

**The Jewish Federation is recognized as an important institution that serves as a catalyst and resource for strengthening Jewish community and collaboration.**

Based on this vision, emerging themes/priorities were identified, and strategies and initiatives were developed to move the community forward in new ways. The plan focuses on these new initiatives while also reconfirming Federation's strong and enduring commitment to Israel and to supporting traditional services, especially services for vulnerable and needy segments of the community including the elderly, people with special needs; children; and college students.

To accomplish the Vision, the plan calls for initiatives in four broad areas: Building Community Through Collaboration and Outreach; Building Our Financial Resources; Effective Communication and Marketing; and Funding and Service Delivery Models. Collectively, the Steering Committee, Campaign Task Force and Leadership Summit explored dozens of potential goals and many times that number of possible strategies for addressing the priority areas described in the previous section. The work of other Jewish communities and national organizations provided ideas and guidance. Ultimately, however, strategic choices were made based on consideration of three broad criteria: potential impact, costs of implementation (both human and financial) and ease of implementation. While this report describes thirteen recommended strategies and dozens of specific initiatives designed to drive those strategies, four broad thrusts are at the heart of the plan:

- **Building Community Through Collaboration and Outreach**

During the information-gathering phase, both key informants and web-based survey respondents recognized past successful collaborative efforts and stressed that increased collaboration and cooperation is essential to the future of the Jewish community. Complementing these findings were concerns raised throughout the process on the need to expand efforts to attract, train, develop and retain volunteer leadership for each of our Jewish community institutions, as well as finding more effective ways to welcome and engage diverse members of the Jewish community. It has become apparent that the only way the community can achieve its vision is through increased and strategic collaboration. In this regard, collaboration and cooperation should be treated not as a separate issue area but as a central idea and a linchpin that holds the rest of the strategic plan together. Most respondents see the Federation as uniquely positioned and qualified to bring all sectors of the Jewish community together around these issues. The Federation has been an initiator and facilitator of a number of community-wide collaborative projects and initiatives.

In the area of Building Community Through Collaboration and Outreach five goals and a number of subsidiary initiatives are being recommended:

1. Provide Active and Coordinated Community Outreach Activities that Provide Multiple Points of Entry and Contact
2. Achieve Greater Cohesiveness, Trust and Respect Among Segments of the Jewish Community
3. Actively Promote, Enhance and Enable Collaboration Among Jewish Institutions

4. Train and Develop Existing Jewish Community Leadership While Building Connections
5. Attract, Develop and Retain New Leadership for Jewish Community Institutions

- **Building Our Financial Resources**

One of the limiting factors in Federation's ability to fulfill its mission is the amount of money generated through annual and endowment fundraising efforts. Declines over the past six years in the total dollars raised and number of campaign donors reflect a number of factors, including the deaths and moves of major donors, and some of the changing demographics and wealth patterns described in this report's introduction. These results do not reflect the wealth and capacity of the Jewish community, or enable the Federation to meet its responsibility responding to Jewish needs locally, in Israel and around the world. At the same time, there is great competition for charitable dollars.

In addition to a number of broad communication and marketing initiatives described in the next section, the following actions are being recommended to expand financial resources and to return the annual campaign to the \$1,515,000 level by 2009:

1. Re-Energize Campaign Structure and Volunteers and Ensure that Federation and Community Leadership Supports the Annual Campaign with Quality Giving and Active Participation
2. Expand the Annual Campaign Donor Base and Achieve Capacity Giving by Community Members
3. Adopt an Integrated Financial Resource Development Model, combining annual campaign and planned giving development efforts for targeted donors

- **Effective Communication And Marketing**

Effective communication and marketing are critical factors for taking good programs and services and using them to generate high participation levels and increased financial support. Unfortunately, many community members, independent of their level of Jewish affiliation, do not know what Federation is and does, or why they should participate, contribute or volunteer. Key Informants and survey participants felt that Federation communication should be enhanced, and that more frequent and more effective publicity and marketing are needed. Effective communication also emerged as an important strategy in the Collaboration, Outreach and Fundraising areas.

Fortunately, this is an area where a great deal is known regarding what is and is not effective in reaching out to the diverse members of the today's Jewish community. While some steps require the expenditure of additional dollars, others simply require a consistent discipline and awareness of the Federation's strategic marketing objectives. The following initiatives are being proposed:

1. Enhance the Community's Awareness, Understanding and Utilization of Available Services and Programs by Improving Marketing, Publicity and Communication in the Community

2. Increase Federation's Marketing Budget to Support Activities and Events Targeted to Strengthening the Annual Campaign

- **Funding And Service Delivery Models**

The preliminary research and Leadership Retreat discussions elicited comments regarding the full array of programs and services offered by the Central Massachusetts Jewish community, generally with comments reflecting on their importance to the community and their good quality. One service area, however, Jewish education, emerged as a priority area due to both its potential impact on Jewish identity and Jewish connections and concerns over providing the best possible Jewish education in the most effective and cost-efficient manner. In addition, the Strategic Planning Steering Committee was asked to develop recommendations regarding a Federation allocation approach, with the goal of using the allocations process to maximize the impact of the dollars raised through the annual campaign.

The Committee is making three recommendations as a result of its work, addressing funding criteria, supplementary Jewish education, and an overall allocations approach:

1. Implement a Funding Approach Based on Established Funding Criteria
2. Develop a Community Model and Funding Approach for Supplementary Jewish Education
3. Integrate Strategic Plan Goals and Initiatives into Annual Allocations Approach

Successfully implementing the initiatives presented in this report will require the serious attention of volunteer and professional Federation leadership, delegation where appropriate to existing or new committees and task forces or to other Jewish community institutions, and a formal system for monitoring progress and making mid-course adjustments. It is an ambitious agenda, adding to the demands of current Federation operations. This will likely necessitate re-prioritization of existing responsibilities and activities, while also seeking to generate additional human and financial resources to support these efforts.

The Federation Executive Committee should assume broad oversight responsibility for plan implementation and should develop, with staff input, reasonable timelines for working on each of the initiatives. While some initiatives will need to be worked on simultaneously, others may make more sense to tackle sequentially. A formal structure should be created to encourage and monitor implementation efforts. Part of this structure should be the development of specific and measurable benchmarks for each initiative that can be used for measuring impact, as well as metrics for annual evaluation of success in implementation of the plan recommendations.

This Jewish community is at a crossroads in its history. We must reach out to those who have not yet connected to the community; we must strengthen the Jewish identity of our young people; we must promote tzedakah, help people in need and build toward excellence in everything we do. The completion of this plan is the beginning, not the end. It is the beginning of a new era when the potential for networking and collaboration is enormous. The Jewish Federation of Central Massachusetts is standing by to take a leadership role in the implementation of this plan and in the facilitation of collective initiatives that involve all the institutions in the community.

## Section 1. Introduction

Americans live in a time of accelerating change. Globalization, mobility, geographic dispersion, technology, communication and the Internet have changed the way we live. A growing move away from communal structures toward a radical individualism pervades our society. Our young people are subject to multiple influences outside of the family and offered many options and opportunities. Jewish communities can no longer assume that the way one generation lives will continue into the next generation and beyond.

These trends have put pressure on Jewish life and Jewish communities around the world and the Central Massachusetts area is no exception. For close to sixty years, The Jewish Federation of Central Massachusetts has been serving Jews living in the region, representing the Jewish community, promoting unity among Jewish groups and organizations to enhance the welfare and quality of life of the local Jewish population, and coordinating fundraising efforts for the benefit of local, national and international Jewish groups and organizations. Federation provides a range of programs and services, working with and through well-respected local agencies, congregations and other local Jewish organizations. Federation has also maintained strong relationships with Israel and with its sister Partnership 2000 community in the Afula/Gilboa region, supported through annual funding, local programming and Israel missions.

As leaders of the community, we have a long-standing commitment to take care of Jews in need locally and around the world. We want our young people to grow up to value the Jewish ideals and traditions that mean so much to us and have meant so much to our ancestors. We are bombarded with changes that threaten our ability to accomplish these goals. The region's Jewish population has changed significantly. Perhaps the most significant demographic trend involves the growth of a younger, relatively affluent Jewish population in the Westboro area, estimated to now comprise as much as 25% of the Central Massachusetts Jewish population, accompanied by a decrease and aging of the Worcester Jewish population and a more modest growth of Jews living in the many other towns surrounding Worcester. These changes have created new challenges for Jewish institutions throughout the region, in responding to families who are different in many ways from those of previous years and who have different needs and expectations. It was clear to the leadership of the Jewish Federation that there were significant gaps between the roles federation has filled in the past, its current programs and accomplishments, and the challenges facing the Jewish community today and in years to come.

In June 2005 the Jewish Federation initiated this strategic planning process to develop a more systematic assessment of community needs and dynamics, to identify the key issues the community should tackle in the next three to five years given the significant challenges and limited staff/volunteer time available, to clarify the roles Federation should play in addressing those issues, and to create a well developed action plan for the next five-year period. A related objective was to develop approaches that would help Federation enhance its allocations and planning process to support creative responses to priority needs, reconfirming Federation's strong and enduring commitment to Israel and to supporting traditional services, especially services for vulnerable and needy segments of the community including the elderly, people with

special needs; children; and college students. The explicit goals of the Strategic Planning process were:

- To coalesce and build stronger community
- To engage all components of the Jewish community
- To create a community vision
- To develop 4-6 powerful community-building initiatives
- To identify the role of Federation and community agencies in facilitation of the initiatives

The United Jewish Communities Consulting Department (UJC Consulting) was selected through a competitive Request for Proposal process to assist in this planning effort and a Strategic Planning Steering Committee chaired by Howard Fixler was formed. As a result of Federation's relationship with United Jewish Communities, UJC Consulting was able to absorb approximately 70% of the cost of these services. As a first step, key informant interviews were conducted with twenty-five individuals representing diversity of ages, geography, denomination and level of participation and involvement. These interviews were designed to identify key issues and opinions to help inform the visioning and priority setting processes, and included discussion of Jewish Community Strengths/Accomplishments, Jewish Community Weaknesses/Challenges, Community Vision, Federation Effectiveness and Image, Agency/Synagogue Effectiveness, Unmet Needs, Community Coordination and Collaboration, and Volunteer/Professional Leadership.

An internet-based Jewish Community Survey conducted in November and December provided input from another 234 individuals from throughout the towns served by the JFCM. This research was supplemented throughout the planning process by a review of U.S. census data for the Worcester area and data from the 2001-2001 National Jewish Populations Survey, by service delivery questionnaires that were completed by eight synagogues and by the Worcester JCC, the Westboro JCC, New Jewish Academy and Yeshiva Achei Tmimin.

One of the principles employed by the Steering Committee was to engage and inform community leadership throughout the process. This included regular reports to the Federation Board and to the Leadership Summit, which is comprised of all agency and synagogue presidents, executive directors and rabbis and opportunities for input on the draft vision statement and preliminary subject area discussions. In fact the Leadership Summit was utilized as a strategic planning work group in the area of Collaboration. However one of the most important areas of involvement was in a five-hour Community Leadership Retreat held the first Sunday in December.

The Leadership Retreat was designed to identify the elements of a Community Vision that could drive the strategic planning process, as well as the priority areas on which the plan should focus. The Community Vision that is presented in the next section is the result of several months of discussion and revision, by the Steering Committee, Federation Board and Leadership Summit.

With this vision as a guidepost, the Steering Committee turned its attention to the five Emerging Themes or priority areas identified at the retreat, and to formulating strategic priorities, goals, objectives and an action plan designed to bring the community closer to that vision. A Campaign Task Force was formed and the Leadership Summit enthusiastically agreed to serve as the

Collaboration Task Force, with the Steering Committee assuming responsibility for addressing the other three areas and for integrating the work of the two task forces.

This plan lays out that vision and action plan. It is based on input from the Key Informant participants; Community Survey respondents; feedback solicited from Federation, agency and synagogue leadership; as well as the enormous effort of the Strategic Planning Steering Committee that included the five hour kickoff visioning retreat, monthly committee meetings and parallel subcommittee meetings. As a result, the plan represents the culmination of more than four hundred hours of brainstorming, discussing and prioritizing, donated by volunteers and professionals from across the community. Special thanks are due to Howard Fixler and Financial Resources Director Olga Yorish for their extraordinary and tireless efforts shepherding this planning process, and to Executive Director Howard Borer for his support, insights and active participation.

This plan is based on a vision of the future honed by the Strategic Planning Steering Committee to paint a picture of a future that is ambitious but achievable. However, it is also a practical plan that can be implemented within a reasonable timeframe and with resources that are realistically available within our community. The full implementation of this plan has the potential to make the area served by the Jewish Federation of Central Massachusetts into a more vibrant Jewish community where Jews of all denominations and levels of involvement will be attracted to come and live fulfilling Jewish lives. The Federation cannot solve all the problems it faces at once, but it can make significant impact on the future of our community in the priority areas outlined in this plan. To reinvigorate this community, this plan sets limited and concise priorities to be achieved with excellence, discipline and efficiency.

As you read this report, imagine how its implementation would transform the Jewish community. Imagine how a serious and coordinated effort by community institutions to welcome and engage people, supported by effective communications and marketing and increased financial resources would swell membership rosters and energize all of these agencies and synagogues. Imagine how changes in the culture of this Jewish community and strengthening its institutions will result in better serving all Jews, young and old, religious and secular, interfaith, newcomers and those who are newly inspired. Also, imagine how this strategic planning process and the recommendations in this report can serve as important first steps in creating true collaborative relationships across all of our Jewish institutions.

## Section 2. Community Vision

The process began with articulating a Vision for our Community. It is a bold and aspirational vision. Though it will not be achieved overnight, it provides direction -- a guidestar -- for the work. It was created as a vision for the entire Jewish Community that also defines Federation's role providing coordination and leadership for the overall Jewish community. It serves as a navigational point to ensure that this community can work collaboratively with focus on furthering a set of common goals. This is the picture of the future that community leadership hopes to create – a picture that hopefully will inspire others to become part of this endeavor.

This statement highlights Federation's purpose and the roles it seeks to play in building a cohesive and welcoming Jewish community in the region it serves. Underpinning these roles is a commitment to partnership with local Jewish institutions toward the shared goal of a vibrant Jewish community marked by strong Jewish identity, high levels of participation, and deep commitment to Jewish community locally, in Israel and around the world.

## **Jewish Federation of Central Massachusetts Vision Statement for the Central Massachusetts Jewish Community in 2015**

**Jewish identity is strong, with the Jewish community recognized as active, inclusive and welcoming** for all Jews, characterized by:

- High quality, affordable, effective Jewish education and identity-building programs for Jews of all ages and stages of life, denominations and levels of involvement throughout the towns of Central Massachusetts
- Varied opportunities for community members to meet their spiritual, cultural and educational needs and express and strengthen their Jewish identity
- High levels of participation in Jewish life by the majority of community members
- Commitment to preserving, protecting and enhancing our Jewish heritage
- Community outreach activities that are coordinated and provide multiple points of entry

There is a landscape of strong institutions with an **established culture of collaboration and communication**, reflected in:

- Mutual trust and respect among institutions and individuals of different backgrounds
- Regular meetings and communications that help build institutional capacity, maximize coordination and increase the community's awareness and understanding of available services and programs
- Numerous examples of shared facilities, functions and services that enhance the effectiveness of agencies, synagogues and organizations

There is a strong sense of **connection and responsibility for Jews wherever they live**, and a **culture of ownership and communal responsibility** where the overwhelming majority of Jewish community members are inspired to contribute time and financial resources in relation to their ability, evidenced by:

- A coordinated network of well-known, accessible and affordable social services
- A strong identification with and commitment to care for Jews-in-need in Israel and around the world through both advocacy and financial support

**The Jewish Federation is recognized as an important institution that serves as a catalyst and resource for strengthening Jewish community and collaboration**, characterized by:

- A compelling Federation Annual Campaign and Planned Giving program that results in capacity giving by Jewish community members of all ages reflecting their financial resources, generating sufficient money to support ongoing, future and emergency needs
- A clearly demonstrated Federation role in community planning, bringing agency and synagogue leadership together to address issues crossing individual institutional boundaries
- A strong cadre of committed volunteers and leadership, and ongoing leadership development activities that help train, support and nurture individuals at all stages of their lay leadership careers
- Opportunities for agencies and synagogues to benefit from Federation expertise and economies of scale in areas ranging from financial resource development to marketing to financial management
- High quality, affordable, effective Jewish education and identity-building programs for Jews of all ages and stages of life, denominations and levels of involvement throughout the towns of Central Massachusetts
- Varied opportunities for community members to meet their spiritual, cultural and educational needs and express and strengthen their Jewish identity
- High levels of participation in Jewish life by the majority of community members
- Commitment to preserving, protecting and enhancing our Jewish heritage
- Community outreach activities that are coordinated and provide multiple points of entry

## Section 3. Emerging Themes

The Emerging themes identified through the retreat were:

- 1. A MORE COLLABORATIVE AND COHESIVE COMMUNITY** – Central to this theme is the need to maintain individual strengths and diversity while finding ways to combine and strengthen programs. This will require developing a language and culture of collaboration to use in overcoming resistance, driven in part by the reality of limited human and financial resources. Other issues include the necessity of critical mass for successful programs, reducing duplication of services and over-programming, tackling the us-they images held by Worcester/Westboro area communities, getting people to see beyond their own institution, and having the courage to make difficult choices together.
- 2. A WELCOMING COMMUNITY WITH ACTIVE OUTREACH AND ENGAGEMENT** – People in society today are looking for connections – our job is to identify target groups, survey them to determine what they want, and then match resources to needs. A real culture of openness and inclusiveness is a critical ingredient, as well as responsiveness to the changing nature of the community.
- 3. MAINTAINING AND ENHANCING FINANCIAL RESOURCES** – Making Federation more of a gateway can help to build the base of donors. We need to be able to directly connect the benefits of Federation and the annual campaign to each individual donor, in addition to getting back to the campaign basics of more face-to-face discussions. Finally, this will require developing the next generation while strengthening existing generations.
- 4. STRENGTHENING JEWISH EDUCATION SYSTEM FOR CHILDREN, TEENS AND FAMILIES** – Jewish education and lifelong learning can be the theme used to create a model that integrates themes of collaboration, leadership, outreach, resource utilization and financial resource development. One concept would be to create an educational hub, perhaps initially at the New Jewish Academy and extending in the future to a Westboro Preschool/K-3 facility. Synagogues could offer collaborative educational programs at the hub, as well as a combined afternoon school program, social justice programs and adult education. This would also be a natural breeding ground for greater involvement and for new leadership.
- 5. DEVELOPING STRONG AND SUFFICIENT LAY LEADERSHIP AND SUPPORTING PROFESSIONAL LEADERSHIP** – It is important to provide current and future leaders with the tools they need to be effective and to help their organizations clearly define goals. Staffing and consistent funding are key. A second focus should be broadening relationships between and among current and potential leaders, connecting peers at events, national meetings and on missions. The LEAD and Cotton leadership programs, if they can attract a critical mass of participants, are one effective approach that should be supplemented by nurturing, mentoring and follow-up to engage participants in leadership roles.

## Section 4. Building Community Through Collaboration and Outreach

To accomplish the Vision, the plan calls for initiatives in four broad areas: Building Community Through Collaboration and Outreach, Building Our Financial Resources, Effective Communications and Marketing, and Funding and Service Delivery Models. Collectively, the Steering Committee, Campaign Task Force and Leadership Summit explored dozens of potential goals and many times that number of possible strategies for addressing the priority areas described in the previous section. The work of other Jewish communities and national organizations provided ideas and guidance. Ultimately, however, strategic choices were made based on consideration of three broad criteria: potential impact, costs of implementation (both human and financial) and ease of implementation. This resulted in the goals and initiatives or strategies described in this and the following three sections.

As noted in the introduction, Jewish federations across North America are struggling with the challenges of serving communities in an era of rampant individualism and continuous mobility. The theme of collaboration and cooperation among Jewish institutions was one of the most often mentioned throughout the strategic planning process. During the information-gathering phase, both key informants and web-based survey respondents recognized past successful collaborative efforts and stressed that increased collaboration and cooperation is essential to the future of the Jewish community.

Complementing these findings were concerns raised throughout the process on the need to expand efforts to attract, train, develop and retain volunteer leadership for each of our Jewish community institutions, as well as finding more effective ways to welcome and engage diverse members of the Jewish community. The need for and importance of collaboration and cooperation has permeated the discussions on all other priority issues, from leadership development to Jewish education to outreach and engagement and fundraising. It has become apparent that the only way the community can achieve its vision is through increased and strategic collaboration. In this regard, collaboration and cooperation should be treated not as a separate issue area but as a central idea and a linchpin that holds the rest of the strategic plan together.

Most respondents recognized the Federation as the only organization that has a potential and expertise to bring all sectors of the Jewish community together around these issues. The Federation has been an initiator and facilitator of a number of community-wide collaborative projects and initiatives. As a funding organization, Federation has the capacity to enable and reward cooperation. Going forward, this aspect of the Federation will become even more important and is part of a national trend with many communities looking to their Federations to play more of a convener role. There is an increasing need in most communities for some “glue” to help the communal organizations work together more effectively as a system. At the same time, there is an increasing emphasis on communication as Jewish organizations look to engage more people and deepen the involvement of those who already participate. Again, Federations have been asked to coordinate these efforts on a community-wide basis.

In the area of Building Community Through Collaboration and Outreach five goals and initiatives are being recommended:

- 1) **Provide active and coordinated community outreach activities that provide multiple points of entry and contact**
  - a) Increase opportunities for engagement through co-sponsored events, “public space” and “destination: Jewish culture” programs, and web-based outreach initiatives
  - b) Continue to develop programs and initiatives tailored to the needs and desires of Westboro area households
- 2) **Achieve greater cohesiveness, trust and respect among segments of the Jewish community**
  - a) Explore programs such as a community-wide Mitzvah Day coordinated by the Federation with participation from all agencies, synagogues, and organizations
  - b) Encourage synagogues and organizations to increase the openness of services and programs to non-members
- 3) **Actively promote, enhance and enable collaboration among Jewish institutions**
  - a) Create Federation funding approaches that give priority to funding programs and services that require collaboration
  - b) Encourage agencies and synagogues to discuss their space needs and availabilities as a part of calendaring process
  - c) Strengthen coordination and publicity around community-wide programs such as Yom HaShoah and Yom Ha’atzmaut observances
  - d) Establish a committee to explore and make recommendations regarding the creation of a community youth group that could bring together youth from across Central Massachusetts communities and different denominations on a monthly or bi-monthly basis
- 4) **Train and develop existing Jewish community leadership while building connections**
  - a) Create a community-wide leadership development program with skill workshops open to board members of every Jewish agency and synagogue
  - b) Support creation of a mentor program in each Jewish institution matching current and more seasoned lay leaders
  - c) Create leadership training opportunities for senior level leadership
  - d) Create a community volunteer recognition program
  - e) Implement ongoing evaluation of leadership development programs with regular agency/synagogue input
- 5) **Attract, develop and retain new leadership for Jewish community institutions**
  - a) Refine Cotton Young Leadership Program
  - b) Develop outreach, recruitment and training programs targeted at newcomers and young retirees

## **1) PROVIDE ACTIVE AND COORDINATED COMMUNITY OUTREACH ACTIVITIES THAT PROVIDE MULTIPLE POINTS OF ENTRY AND CONTACT**

There exists a critical need to develop a cohesive and coordinated Jewish community outreach and welcoming program for the community, which would provide multiple points of entry and contact and result in high levels of participation in Jewish life by the majority of community

members. Designed to encourage people at all ages and life stages to get involved and stay engaged, such a program would focus on accomplishing:

- Identification of newcomers to the community
- Programmatic opportunities to gather these newcomers together and create a sense of community
- Identification of Jews who are unaffiliated or have weak ties to the Jewish community for the purpose of gaining some understanding of why they are less committed
- Creation of opportunities to engage members of the community of all ages and stages of life, including singles, interfaith couples, currently less committed Jews, dropouts and unaffiliated Jews, and all others whose needs are not being effectively met by the community
- Coordinated programming across the Jewish agencies/institutions of the community to foster and strengthen the feelings of Jewish belonging for all members of the community including those with currently weak linkages to the Jewish community. At the same time some of this programming can also be used to strengthen relationships with the overall Central Massachusetts community, particularly through Tikkun Olam community service projects
- Collaborative efforts by all Jewish community agencies and institutions working together to meet the needs of community members at every stage of life and at every level of Jewish involvement

Currently there are many programs within the various agencies and institutions of the Central Massachusetts Jewish community which address one or more of these objectives with a few target constituencies. The absence of community coordination across all agencies and institutions means that such programs:

- Struggle to find the members of their target audience
- Suffer from lack of institutional commitment—most institutions exist primarily to serve their dues paying members
- Struggle to raise funds
- Often miss opportunities to learn from each other and from national models
- Lack scale—especially for marketing and publicity
- Significantly leave out certain groups

This is a critical gap, which has significant impact on both attracting Jews to the community and in making them integral and productive partners in the community. The impact of such a strong community-wide program would be felt across all the target populations, from the most committed Jews in the community to those on the fringes or just moving into the area. Implicit in this goal is a commitment of community resources and centralized coordination of programs and processes to meet community priorities. Accordingly, the plan recommends:

**Initiative: Increase opportunities for engagement through co-sponsored events, “public space” and “destination: Jewish culture” programs, and web-based outreach initiatives**

The key elements of this initiative, designed to insure “community outreach activities that are coordinated and provide multiple points of entry,” will include:

- Formation of a committee with community-wide representation to plan, coordinate and facilitate implementation of the initiative across community agencies and institutions
- Research into existing successful models in the community and around the country
- Elevation of the level of coordination and cooperation among current programs
- Promotion of new policies and a culture of welcoming at all communal institutions
- Development of new welcoming and outreach programs that include:
  - Co-sponsoring events with other Jewish and non-Jewish organizations to attract Jews and Jewish involvement (the Hillel model)
  - Experimenting with Public Space Judaism and Destination: Jewish Culture programs (Jewish food and music street festival, film festival, etc with careful selecting of venue(s))
  - Jewish Welcome Wagon and Shalom Baby programs that provide gifts and information on the Central Massachusetts Jewish community, and offers a monthly or quarterly Jewish community orientation and tour as well as home hospitality opportunities
  - Developing web-based outreach initiatives such as Gesher
- Tracking and monitoring the success of the initiative

NOTE: The Worcester JCC has recently initiated a joint program with local synagogues to attract new members. Synagogues and the JCC agreed to conduct cross-promotion and marketing along with reduced membership fees for the people who have not been members of the JCC and synagogues. Such efforts should be encouraged and supported.

**Initiative: Continue to develop programs and initiatives tailored to the needs and desires of Westboro area households**

The Jewish Federation is now several years into an effort to better understand, serve and build connections with the Jews living in the Westboro area. While these efforts have begun to bear fruit in terms of improved institutional coordination, increased participation and emerging leadership, these efforts must be maintained and further developed. This will include:

- Building on the success of the Tapestry Program
- Creating a regional Westboro Area Council to work with Federation and other Jewish institutions around programming, leadership development, campaign and potentially allocation of funds (see Section 4)

## **2) ACHIEVE GREATER COHESIVENESS, TRUST AND RESPECT AMONG SEGMENTS OF THE JEWISH COMMUNITY**

There are currently many collaborative projects in the community, such as community-wide Yom HaShoah and Yom Ha'atzmaut observances, Prozdor High School, Domestic Violence Task Force, joint synagogue services, sharing meeting space among agencies and synagogues,

and joint provision of services by agencies and synagogues. In 2004, recognizing the need for increased collaboration the Jewish Federation of Central Massachusetts convened the Leadership Summit - a round table of agency and synagogue presidents, rabbis, and executive directors. Since its creation, the group met on a regular basis to share information and discuss issues of common concern. All respondents to questionnaires and surveys felt very positively about the effects of collaboration on agencies' and synagogues' ability to serve their constituents. In the area of marketing and sharing information, a community calendar on the Federation's web site plays an important role in disseminating information about available programs and services. However, there is a clear sense of a lack of community-wide marketing and publicity.

Most respondents identified strong Jewish institutions as a community asset and strength, noting at the same time the negative effects of territorialism and parochialism in face of the need for increased collaboration. Turf issues and competition, real and perceived, are seen as major barriers to increased cooperation. We need to build trust, respect, and understanding both on the individual level, among community members, and on the institutional level. Part of the response involves an expanded Jewish community marketing effort described in Section 6. In addition:

**Initiative: Explore programs such as a community-wide Mitzvah Day coordinated by the Federation with participation from all agencies, synagogues, and organizations**

The objective is to create a high impact program when federation provides coordination but each organization takes ownership. One possible program, a community-wide Mitzvah Day, provides a focused, time-limited opportunity for people to meet and work together, a way to attract Jews whose interests lay in this area, and a chance to build bridges with the general community.

**Initiative: Encourage synagogues and organizations to increase the openness of services and programs to non-members**

Part of an effort to lower institutional barriers to participation is a conscious, active effort to encourage participation in programs and services by non-members and by members of other synagogues and organizations. This effort needs to include:

- Publicity that is designed and disseminated to reach broad audiences
- Cooperative announcement of events sponsored by other organizations in institutional newsletters
- Sensitivity to timing issues, avoiding calendar conflicts where possible and taking into consideration the needs of different potential participants
- Providing a welcoming environment, including clear signage, greeters to help direct participants and being friendly during informal social time

### **3) ACTIVELY PROMOTE, ENHANCE AND ENABLE COLLABORATION AMONG JEWISH INSTITUTIONS**

Many of the recommended goals and strategies in this report are designed in part to bring Jewish community institutions and institutional leadership together and to encourage collaboration among them. There are also three initiatives whose primary goal is to increase institutional collaboration.

#### **Initiative: Create Federation funding approaches that give priority to funding programs and services that require collaboration**

The most effective strategy in achieving this goal is for the Federation to give priority to funding collaborative projects through its allocations process. Funding should be provided for programs and services that require collaboration (that individual organizations are unable to fund on their own) and that result in increased effectiveness and efficiency of providing services.

#### **Initiative: Encourage agencies and synagogues to discuss their space needs and availabilities as a part of calendaring process**

Each agency/synagogue will prepare a summary of its space availability for use by other institutions or groups that is updated and distributed to all execs and presidents annually. The Worcester Jewish Community Center can coordinate this initiative. Other ideas to be explored include:

- Improving the community calendar, creating a community calendar that could be shared by all organizations
- Purchasing a calendar software packet that is made available by Federation to participating organizations along with grants and training to use it

#### **Initiative: Strengthen coordination and publicity around community-wide programs such as Yom HaShoah and Yom Ha'atzmaut observances**

These community-wide programs offer an easy way to reinforce and publicize collaborative efforts among Jewish community institutions.

#### **Initiative: Establish a committee to explore and make recommendations regarding the creation of a community youth group that could bring together youth from across Central Massachusetts communities and different denominations on a monthly or bi-monthly basis**

A community Jewish youth group, supplementing existing community and denomination-based youth groups, would provide a larger and more exciting youth group population while serving as a model for the community-wide connections recommended in this report.

#### **4) TRAIN AND DEVELOP EXISTING JEWISH COMMUNITY LEADERSHIP WHILE BUILDING CONNECTIONS**

One of the challenges facing virtually all nonprofit organizations today is the ability to attract and retain sufficient numbers of dedicated and experienced volunteers. This is certainly true for the Jewish institutions of Central Massachusetts, and is an area where Jewish federations have demonstrated the ability to provide high quality and cost-efficient responses on a coordinated community-wide manner. The Strategic Planning Steering Committee is recommending three initiatives to enhance the generic leadership skills of current Federation, agency and synagogue board members and to help insure effective succession planning for key Federation, agency and synagogue leadership roles.

##### **Initiative: Create a community-wide leadership development program with skill workshops open to board members of every Jewish agency and synagogue**

A Federation sponsored community-wide leadership development program is one example of how a coordinated approach is able to meet important needs in a cost efficient manner. Rather than expecting each institution to implement its own stand-alone board development program, a community-wide program can be created to enhance generic skills in areas such as reading financial statements, basic marketing, membership recruitment, performance evaluation and/or developing effective lay-professional partnerships. At the same time this provides opportunities to build connections among institutions and among institutional leadership. An important component of this program is a commitment to ongoing evaluation with regular agency/synagogue input.

##### **Initiative: Support creation in each Jewish institution of a mentor program matching current and more seasoned lay leaders**

In addition to skills workshops, one of the concerns frequently raised by newer board members is that in some areas they do not feel their input and opinions are valued, while in other areas they do not have enough familiarity with the issues to participate in a meaningful way. One relatively straight-forward way to help support newer board members is to match them with a more seasoned lay leader in a formal mentor program. Creation of a successful mentor program requires both good pre-planning and ongoing monitoring, including the creation of clear and reasonable expectations for both the mentor and mentee and follow-up to identify any problems or opportunities to improve the program.

##### **Initiative: Create leadership training opportunities for senior level leadership**

While it is important to help strengthen the skills and knowledge of newer board members, senior leadership preparing for or serving in top leadership roles face a unique set of challenges. While the Steering Committee is not recommending the creation of a formal leadership program for this audience, opportunities should be sought to bring them together for mutual support and learning utilizing speakers and trainers that are already in town for other purposes.

**Initiative: Create a volunteer recognition model, to encourage greater volunteer recognition.**

More must be done to make volunteers feel appreciated and valued throughout the Jewish community and its various institutions.

## **5) ATTRACT, DEVELOP AND RETAIN NEW LEADERSHIP FOR JEWISH COMMUNITY INSTITUTIONS**

One area where current efforts should be reinforced and strengthened involves focused efforts to reach and engage younger Jews ages 25 - 45, newcomers to Central Massachusetts and young retirees through structured programs for introducing Jews to the Central Massachusetts Jewish community, its institutions, and opportunities for greater involvement.

### **Initiative: Refine Cotton Young Leadership Program**

Feedback from past participants and the experiences of other Jewish communities suggest a few ways in which the Cotton Young Leadership Program can be strengthened for future participants. The Cotton Program is a wonderful tool for beginning to excite Jews ages 25 –45 and to encourage their more active participation in the community and as volunteers and board members for our Jewish institutions. This program could be even more effective:

- Program goals should be clarified and consistently communicated to participants
- Enhance recruitment efforts, encouraging greater input from Jewish agencies and synagogues
- Be sure to recognize and address the social aspects of the program, providing occasional opportunities for participants to get together with their spouses and/or families
- Create a mentor program matching Cotton participants with more senior community volunteers, and taking into account professional backgrounds of mentors and mentees
- Ensure placement of Cotton program graduates on committees/boards, etc. with a system for tracking program graduates
- Implement good evaluation and follow-up

### **Initiative: Develop outreach, recruitment and training programs targeted at newcomers and young retirees**

While the Cotton Program is specifically targeted at young adults, it represents a model and a low cost way to provide select programs and speakers for two other potential sources of volunteers: Jews who have recently moved to the area but are too old for the Cotton Young Leadership Program and young retirees who have both experience and time to volunteer.

## Section 5. Building Our Financial Resources

One of the limiting factors in Federation's ability to fulfill its mission is the amount of money generated through annual and endowment fundraising efforts. The total dollars raised through the annual campaign has decreased over the past six years, gradually by a total of 12% over five years from \$1,550,638 in 2000 to \$1,366,165 in 2005. Unfortunately the drop for 2006 is expected to be approximately equal to the total decrease from the previous five campaigns, with an estimated six-year decline of 24% to a campaign of \$1,175,000. The number of donors has also fallen over the same period, from 1,612 gifts in 2000 to an estimated 1,191 gifts in 2006 for a cumulative decrease of 26%. These campaign results reflect a number of factors, including the deaths and moves of major donors, and some of the changing demographics and wealth patterns described in this report's introduction. These results do not reflect the wealth and capacity of the Jewish community, or enable the Federation to meet its responsibility for responding to Jewish needs locally, in Israel and around the world. At the same time, there is great competition for charitable dollars.

The community leadership retreat on December 4, 2005 identified MAINTAINING AND ENHANCING FINANCIAL RESOURCES as one of the priority issues for the Federation. Specific aspects mentioned during the retreat included the following: building the base of donors; directly connecting the benefits of Federation and the annual campaign to each individual donor; getting back to the campaign basics of more face-to-face discussions; and developing the next generation of donors while strengthening existing generations.

The Strategic Planning Steering Committee further elaborated on this issue in its Vision Statement for the Federation which calls for "a compelling Federation Annual Campaign and Planned Giving program that results in capacity giving by Jewish community members of all ages reflecting their financial resources, generating sufficient money to support ongoing, future and emergency needs."

In addition to a number of broad communication and marketing initiatives described in the next section, the following actions are being recommended to expand financial resources and to return the annual campaign to the \$1,515,000 level by 2009:

### 1) RE-ENERGIZE CAMPAIGN STRUCTURE AND VOLUNTEERS AND ENSURE THAT FEDERATION AND COMMUNITY LEADERSHIP SUPPORTS THE ANNUAL CAMPAIGN WITH QUALITY GIVING AND ACTIVE PARTICIPATION

A short campaign punctuated with high-profile events (back-to-the-basics campaign) will help Federation energize the community. Israel missions have proven a most effective tool in campaign leadership development, and should be made even more available for this purpose.

A knowledgeable and enthusiastic volunteer corps is also a critical component of a successful annual campaign. Federation's annual campaign has always had a core of committed,

knowledgeable, and hard-working volunteers. However, in the past several years, there has been a decline in the number of people who are willing to take on leadership roles. It has also become difficult to recruit new volunteers. The Task Force felt strongly that the success of the annual campaign depends on Federation's ability to attract, recruit, train, and recognize the best campaign volunteers.

Six initiatives are being recommended in this area:

**Initiative: Recruit best talent to head campaign divisions from Cotton Young Leadership Program graduates, Israel mission participants, Federation Board members, Women's Division volunteers.**

Despite changes in fundraising attitudes and approaches, people continue to be motivated by both the causes they support and the individuals who ask them for their support. Federation needs the community's brightest, most committed and best educated volunteers leading campaign efforts.

**Initiative: Re-energize women's campaign; recruit a women's campaign chair for 2007 campaign**

In many Jewish communities, growth in women's campaign has led increase in the general campaign and should be a greater priority in the future.

**Initiative: Improve campaign volunteer recognition. In the coming year, convene a small task force to develop a comprehensive volunteer recognition program**

While enhanced volunteer recognition is important throughout Federation, agencies and synagogues, a particular focus should be on recognizing the campaign volunteers who generate critical financial resources for the community.

**Initiative: Use Israel missions to inspire and educate current and potential campaign leadership, with more focus on fund raising missions**

Mission subsidies can be an effective tool for recruiting participants. Federation should therefore set aside \$15,000 from the Cotton Fund for mission subsidies, and ensure active and consistent follow-up with mission participants.

**Initiative: Work with agency boards (begin for 2007 campaign) and synagogue boards (begin for 2008 campaign) to increase their giving to and participation in the annual campaign**

National research has demonstrated that agency board involvement in and support for the Federation annual campaign is associated with significant increases in the campaign, as community leadership demonstrate their commitment and utilize their knowledge of community needs.

**Initiative: Conduct a short and vigorous campaign with an opening on September 12, 2006 and a closing on December 15, 2006, understanding, however, that we need to work with some major donors throughout the year**

A focused and shorter campaign can generate increased excitement and momentum, while making the most effective use of campaign volunteers.

To accomplish this initiative, the following actions should be taken:

- Solicit major donors and leadership in advance of the campaign opening
- Make capacity giving and participation in campaign an expectation and a requirement for serving on the Federation Board. Establish appropriate giving benchmarks for Federation Board members and executive committee members, and make these benchmarks and expectations clear when recruiting for Federation Board and Executive Committee positions.
- Conduct campaign caucuses with Federation Executive Committee and Board members, to provide them with an opportunity to lead with their gifts. The Executive Committee caucus should be at its September 2006 meeting and the Board caucus at its October 2006 meeting.

Measurable outcomes

- a. Achieve Federation Board's 100% quality giving in 2007 campaign
- b. Achieve Federation Board's 100% active participation in campaign (Super Sunday and individual solicitations) over three years
- c. Achieve a 20% average Federation Board members' increase in giving over three years
- d. Achieve 100 % agency boards' giving to campaign over three years
- e. Recruit two new members from each agency board to participate in Super Sunday and in individual solicitations during the 2007 campaign
- f. Campaign chairman/Federation president will meet with each agency president to discuss annual campaign during the 2007 campaign

**2) EXPAND THE ANNUAL CAMPAIGN DONOR BASE AND ACHIEVE CAPACITY GIVING BY COMMUNITY MEMBERS**

One of the reasons for a decline in the annual campaign has been “flat” and below-capacity giving by many community members, and especially by a number of major donors. The Westboro area has the potential to bring more campaign dollars in the future but that would require investing significant financial and human resources over a period of time. Given the different nature and needs of the Westboro area Jewish community, campaign strategies will at least initially need to also be different from the traditional strategy proven successful in Worcester. Success in the Westboro area will depend in part on our ability to recruit a core volunteer group.

Five initiatives are being proposed to expand the donor base and more achieve capacity giving, and are listed in order of priority:

**Initiative: Increase the number of face-to-face solicitations, focusing on all donors of \$5,000 and above**

There is no substitute for a face-to-face, personalized solicitation, particularly for the major donors who generate the majority of the campaign funds each year.

**Initiative: Utilize matching challenge grants to encourage increased giving to the annual campaign**

Prevalent throughout nonprofit fundraising and used frequently by other federations, matching challenge grants that allow targeted donors or prospective donors to “double the value” of the gift or increase have proven quite effective.

**Initiative: Create a donor-recognition society for givers of 25+ years**

Often given names such as the Golden Givers Society, such a recognition program acknowledges donors at all levels who have been the most consistent Federation supporters. These donors serve as models for other community members, and represent one of the best targets for endowment gifts.

**Initiative: Begin establishing a structure for a satellite campaign in the Westboro area tailored to community's make-up and needs, focusing initially on the 2008 campaign**

One idea that should be explored is to introduce a targeted giving option to donors in the Westboro area. This could provide donors, on a trial basis, the option of contributing to a “Westboro Fund” (up to 50% of any new gifts and up to 50% of any increase for existing gifts), with Federation creating a mechanism for distributing these dollars with input from and for the benefit of Westboro area Jews.

**Initiative: Identify past Federation donors with significant giving potential and approach each of them individually**

Whatever the cause of their dissatisfaction with or alienation from Federation, these donors have already demonstrated their commitment to the needs addressed through the Annual Campaign.

In addition to these five initiatives, one other idea was discussed and is recommended for further consideration:

**Initiative: Offer a 3-year gift option to a selected group of major donors with a high potential for a significant increase. These donors will be solicited for a Federation annual campaign gift once every three years and asked for a significant increase over three years**

In some cases, donors decide on small or no increase in their annual campaign gift because they know that whatever they give a solicitor will be back a year later asking for another increase. The ability to make a substantial increase over a three-year period reduces this problem, allows a donor to envision their gift at a significantly higher level without having to make the leap in one year, and frees up solicitors to contact other donors in off years. As a related idea, donors could be encouraged as part of their three-year giving option to use a portion of the increase to establish a permanent fund (PACE/LOJE or a designated fund).

Implementation of these initiatives is projected to require three years. As an example, in 2007 Federation should begin laying the groundwork in the Westboro area, focus more efforts on this area in 2008, and fully implement recommendations in 2009.

Measurable outcomes:

- a. Each campaign volunteer will increase her/his number of face-to-face solicitations by 50% in three years
- b. Upgrade four new Lions of Judah in three years
- c. Increase the average annual campaign gift by 5% over three years, from \$962 to \$1,010. This will allow us to reach a campaign total of \$1,515,000
- d. Increase the number of donors in the Westboro area by 25% in three years (from 167 to 207)
- e. Achieve a 10% increase in the number of people in the JFCM database from the Westboro area (from 944 to 1038) and a 10% increase in the overall number of people in the database from the full Central Massachusetts area (from 2910 to 3,200)
- f. Increase the total number of gifts by 26%, from 1,191 to 1,500 gifts, over three years

### **3) ADOPT AN INTEGRATED FINANCIAL RESOURCE DEVELOPMENT MODEL**

The committee is recommending the use of a development approach (university model) for significant segments of the annual campaign. The integrated financial resource development model is based on taking a comprehensive or “holistic” approach to working with major donors, who increasingly view their Federation support in the broader context of their philanthropic goals. Recognizing a generational shift in Federation’s annual campaign donor base, it is critical that we involve older donors in conversations about planning for the future of the Jewish community. One important component is the creation of permanent campaign funds that serve as a foundation for future campaigns while responding to changing generation attitudes about federation and significant generational transfers of wealth.

Partnership between volunteers and professional staff becomes increasingly important in developing relationships with major donors in this new environment. In order to be successful, planned giving efforts have to be integrated into all Federation activities and marketing

materials. Successful transformation of the annual campaign will in large part depend on our ability to collect, store and utilize donor information, taking full advantage of the Federation's data base capabilities.

Advancing this goal will involve the following strategies:

**Initiative: Develop integrated giving plans for selected donors (\$5,000 and above). Make appropriate volunteer and/or staff assignments and train volunteers to have planned giving conversations with their prospects**

Major donors increasingly want to look holistically at all of their charitable goals and gifts, and object to the number and frequency of individual solicitations. An integrated approach also supports developing deeper relationships and better understanding of a donor's interests and motivations.

**Initiative: Increase the role of professionals in face-to-face solicitations; utilize a volunteer/staff team for face-to-face meetings with prospects, where appropriate**

While the role of volunteer solicitors remains very important, professionals are playing an ever-greater role in the donor cultivation and solicitation process, alone and as part of a lay/professional team.

**Initiative: Incorporate the basics of planned giving into campaign worker orientation session, and integrate planned giving information into all Federation marketing materials - Summer 2006**

It is important to increase planned giving educational efforts among campaign workers, donors and the Jewish community at large.

Measurable outcomes:

- a. In 2006-07, create integrated giving plans for all donors of \$10,000 and above and begin implementing them
- b. In 2007-08, create integrated giving plans for donors \$5,000 and above and begin implementing them
- c. Establish three new LOJE funds in three years
- d. Establish five new PACE or designated funds in three years

## Section 6. Effective Communication and Marketing

Effective communication and marketing are critical factors for taking good programs and services and using them to generate high participation levels and increased financial support. Unfortunately, many community members, independent of their level of Jewish affiliation, do not know what Federation is and does, or why they should participate, contribute or volunteer. Key Informant and survey participants felt that Federation communication should be enhanced, and that more frequent and more effective publicity and marketing are needed. Participants had lots of suggestions for how to accomplish this, including better use of email, and felt this was critically important.

Effective communication emerged as an important goal for three of the priority area discussions, Collaboration, Outreach and Fundraising. Fortunately, this is an area where a great deal is known regarding what is and is not effective in reaching out to the diverse members of the today's Jewish community. While some steps require the expenditure of additional dollars, others simply require a consistent discipline and awareness of the Federation's strategic marketing objectives. The following initiatives are being proposed:

### **1) ENHANCE THE COMMUNITY'S AWARENESS, UNDERSTANDING, AND UTILIZATION OF AVAILABLE SERVICES AND PROGRAMS BY IMPROVING MARKETING, PUBLICITY, AND COMMUNICATION IN THE COMMUNITY**

Each of the Strategic Planning committees and subcommittees felt very strongly that a very important strategy looking forward is creating a professionally driven community-wide marketing program coordinated by the Federation. Some of the components of this program may be the following:

#### **Initiative: Enhance marketing and communication efforts to welcome, inform and connect with community members**

These efforts would include:

- Creating a Marketing and Communication Committee comprised of individuals with appropriate experience and expertise. The role of this committee is to develop an overall communications and marketing plan for Federation that supports the goal of enhancing marketing efforts of Jewish agencies and congregations, as well as to coordinate and monitor adherence to this plan in all internal and external communication.
- Hire or contract for a community-wide communication and marketing professional to create and implement marketing plans for the whole community and for the individual institutions - Pivotal to success is the hiring of an individual with strong strategic marketing and public relations skills who will be responsible for raising Jewish community communication and marketing efforts to a new level by:
  - Assisting with marketing and communication issues faced by each organization and helping develop marketing materials

- Raising the level of coverage received by Jewish organizations in the greater community
- Developing community-wide marketing approaches and materials to reach unaffiliated Jews within the community and Jews considering moving to our community
- Managing the community website content
- Creating informational packets on Central MA Jewish community for realtors and major employers and for inclusion in Shalom packets
- Developing/updating mechanisms for distribution of these materials and for consistent follow-up
- Increasing use of Jewish and Worcester web-sites and other web-based approaches
- Establishing agreements by organizations to publicize each other's events and/or create joint publicity, and to encourage members to attend other institutions' events by publicizing in bulletins, announcements, and at board meetings
- Strengthen coordination and publicity around community-wide programs such as Yom HaShoah and Yom Ha'atzmaut observances
- Expand publicity venues to include T&G, Jewish Chronicle, synagogue bulletins, web sites & listservs

**Initiative: Strengthen community website, with better links among websites, upgraded website content and email/internet strategies to increase awareness**

- Create a community electronic newsletter. This newsletter will be a joint project of all Jewish organizations and will be distributed monthly to all members of each organization. It should be easy to read and can be a monthly newsletter in addition to FedMail, not to replace it
- Create electronic communications targeted to younger people, working with Worcester Area Young Jews (WAYJ) to create such a tool
- Provide more community information and links on the Federation web site
- Increase Federation's email distribution list, providing clear and easy ways to sign-up, indicate preferences, or to opt-out of specific emails

**2) INCREASE FEDERATION'S MARKETING BUDGET TO SUPPORT ACTIVITIES AND EVENTS TARGETED TO STRENGTHENING THE ANNUAL CAMPAIGN**

**Initiative: Utilize Strategic Plan to position and support Federation and the annual campaign**

- Link campaign case to community vision and recommendations of the strategic plan. Build a campaign case based on the recommendations of the strategic plan – for 2008 campaign
- Incorporate the recommendations of the strategic plan into volunteer training, campaign materials, and other Federation marketing materials - 2008 campaign
- Use campaign opening/annual meeting to showcase Federation's achievements in order to motivate the community

**Initiative: Energize and mobilize the community around Federation's 60<sup>th</sup> anniversary**

- Establish a meaningful link between the anniversary and the annual campaign. Allocate appropriate resources to implement a celebration of Federation's 60<sup>th</sup> anniversary

**Initiative: Introduce an active E-Philanthropy component to the campaign, utilizing the functionalities of UJCWeb as well as UJC expertise in this area**

E-philanthropy is using technology to improve fundraising, communication and outreach, and donor information management. It does not replace in-person relationships, but is an additional marketing technique that engages the community in the medium of their choice. With the assistance and encouragement of United Jewish Communities, Jewish Federations have dramatically increased the dollars raised through online giving. In 2004, \$2.3 million was raised online just from Federations using UJCWeb. For 2005, the online giving of 81 federations generated more than \$7.6 million for the Annual Campaign from more than 13,000 donors, with average gifts typically ranging from \$200 - \$700. Of these gifts we know that more than 10% were from first-time donors and another 15% from lapsed donors.

## Section 7. Funding and Service Delivery Models

The preliminary research and Leadership Retreat discussions elicited comments regarding the full array of programs and services offered by the Central Massachusetts Jewish community, generally with comments reflecting on their importance to the community and their good quality. One service area, however, Jewish education, emerged as a priority area due to both its potential impact on Jewish identity and Jewish connections and concerns over providing the best possible Jewish education in the most effective and cost-efficient manner. In addition, the Strategic Planning Steering Committee was asked to develop recommendations regarding a Federation allocation approach, with the goal of using the allocations process to maximize the impact of the dollars raised through the annual campaign.

The Committee is making three recommendations as a result of its work, addressing funding criteria, supplementary Jewish education, and an overall allocations approach.

### 1) IMPLEMENT A FUNDING APPROACH BASED ON ESTABLISHED FUNDING CRITERIA

#### **Initiative: Allocations should be made annually based on five established and well-defined Funding Criteria**

The Strategic Planning Steering Committee carefully studied funding approaches used by Jewish communities across the United States, evaluating the advantages and disadvantages of each. They faced questions regarding how Federations decided to fund specific local service providers and how to allocate among multiple providers.

Ultimately the committee took a step back to consider the criteria that are currently used in making allocation decisions, as well as any additional factors suggested by the strategic planning process. Their recommendation is that agencies and schools should be eligible for an annual Federation allocation based on the specific application of five criteria that are summarized below. Each criterion should be clearly defined as part of the implementation process, with appropriate input from the agencies and from their accreditation organizations, and shared with the agencies well in advance of the next allocations process.

These criteria should be further divided into two categories. For the first two criteria, institutions must demonstrate full compliance to be eligible for funding. Any Federation beneficiary agency should be able to demonstrate fiscal soundness and appropriate accountability through its operating performance, financial statements and governance structures. Similarly, any beneficiary agency should be expected to increase Federation visibility and to support the annual campaign, through its communications with families and the community and the participation of its leadership.

The final three criteria in contrast, are areas where the degree of compliance is a more appropriate measure. Consideration of impact, collaboration and integration with other Jewish

education activities, once defined, are likely to include a mix of objective (numbers served, units of service, number of people completing a program, number of co-sponsored activities) and subjective measures (impact of family education programming, efforts to work with other institutions, etc).

The proposed five criteria for Federation funding, subject to more formal definition, are:

- i) **Fiscal soundness and accountability** demonstrated through compliance with operating and reporting standards - institutions must demonstrate full compliance with criterion (i) as defined and promulgated by the Federation Allocations and Executive Committees.
- ii) **Increased Federation visibility**, reinforced by agency Board support for Federation activities including the annual campaign - institutions must demonstrate full compliance with criterion (ii) as defined and promulgated by the Federation Allocations and Executive Committees.
- iii) **Impact** of agency/program on community, informed by an ongoing evaluation process and measured (in part) by measures of quality established by each agency/program - institutions will be evaluated with respect to their degree of compliance with criterion (iii) as defined and promulgated by the Federation Allocations and Executive Committees in concert with community schools
- iv) **Collaborative efforts** with other Jewish community institutions - institutions will be evaluated with respect to their degree of compliance with criterion (iv) as defined and promulgated by the Federation Allocations and Executive Committees in concert with community schools.
- v) **Integration with formal and informal Jewish education activities** that fosters a desire for life-long Jewish living – this criterion applies primarily to Jewish education institutions that will be evaluated with respect to their degree of compliance with criterion (v) as defined and promulgated by the Federation Allocations and Executive Committees in concert with community schools.

## 2) DEVELOP A COMMUNITY MODEL AND FUNDING APPROACH FOR SUPPLEMENTARY JEWISH EDUCATION

There are two competing sets of values that need to be carefully considered:

- a) The values of individual synagogue Hebrew schools that can strengthen ties between those institutions and their members and be tailored to the specific ideologies of each congregation, and
- b) A structure that brings together Jewish children from multiple congregations for all or part of their Jewish education, resulting in potentially higher quality and more efficient

schools, the excitement of larger numbers of students, and the advantage of creating social relationships across the community.

**Initiative: Establish a committee to explore and make recommendations regarding the creation of a Community Hebrew School, as well as opportunities for Federation to support components of individual congregational schools**

### **3) INTEGRATE STRATEGIC PLAN GOALS AND INITIATIVES INTO ANNUAL ALLOCATIONS APPROACH**

Upon Board approval, the Strategic Plan's recommendations should serve as a guide for the annual allocations process.

**Initiative: Federation should use the time between plan approval and the next round of allocations to work with beneficiaries in creating an allocation methodology that supports implementation of the report's goals and initiatives.**

Changing institutional behaviors and community patterns will require serious commitment and consistent application of the principles embodied in this report. In addition, Federation and individual institutions will need to balance the need to support high priority ongoing programs, especially services to vulnerable populations such as the elderly, children, and people with special needs, with the need to put energy and funding behind turning this report and the community vision for the year 2015 into a reality.

## Section 8. Implementation and Timing

Successfully implementing the initiatives presented in this report will require the serious attention of volunteer and professional Federation leadership, delegation where appropriate to existing or new committees and task forces or to other Jewish community institutions, and a formal system for monitoring progress and making mid-course adjustments. It is an ambitious agenda, adding to the demands of current Federation operations. This will likely necessitate re-prioritization of existing responsibilities and activities, while also seeking to generate additional human and financial resources to support these efforts.

The Federation Executive Committee should assume broad oversight responsibility and should develop, with staff input, reasonable timelines for working on each of the initiatives. While some initiatives will need to be worked on simultaneously, others may make more sense to tackle sequentially. A formal structure should be created to encourage and monitor implementation efforts. Part of this structure should be the development of specific and measurable benchmarks for each initiative that can be used for measuring impact, as well as metrics for annual evaluation of success in implementation of the plan recommendations.

In addition, Federation should reconvene a Strategic Planning Committee once a year, during the April/May time frame, to review the progress being made and to recommend plan updates based on that progress and on changes within Federation, the local Jewish community and Jewish needs in around the world. This annual review will allow Federation to benefit from the broader perspectives of the Strategic Planning Committee and will help keep the plan relevant and vibrant.

## Section 9. Conclusion

This Jewish community is at a crossroads in its history. Although the basic institutions of communal life have been built, the challenges of today require more. The needs are many and the community must work together to address them. We must reach out to those who have not yet connected to the community; we must strengthen the Jewish identity of our young people; we must promote tzedakah, help people in need and build toward excellence in everything we do.

The completion of this plan is the beginning, not the end. It is the beginning of a new era when the potential for networking and collaboration is enormous. The Jewish Federation of Central Massachusetts is standing by to take a leadership role in the implementation of this plan and in the facilitation of collective initiatives that involve all the institutions in the community.

## Appendix A – Strategic Planning Steering Committees

### Strategic Planning Steering Committee

Howard Fixler, Chair

Ellen Berezin	Howard Borer
Micah Chase	Gershon Gulko
Peter Herman	Harold Rudnick
Natalie Rudolph	Michael Sleeper
Debbie Thomashow	Olga Yorish

UJC Consulting: Andrew Paller

### Campaign Task Force

Jonathan Barnett	Howard Fixler
Peter Herman	David Persky
Bernie Rotman	Michael Sleeper

### Leadership Summit

Jonathan Barnett, Chair

Joel Baker	Rabbi Alfred Benjamin
Rabbi Seth Bernstein	Rabbi Nachman Bruce
Shelley Dubin	Debbie Fins
Howard Fixler	Rabbi Hershel Fogelman
Doug Freund	Rabbi Michael Green
Emily Holdstein	Peter Lurier
Rabbi Larry Milder	Rabbi Jordan Millstein
Laura Myers	David Nestelbaum
Rabbi Joel Pitkowsky	Mary Police
Jordan Robbins	J. Robert Seder
Ed Sherr	Rick Shrier
Steve Slaten	Lauren Smith
Nina Stoll	Carlton Watson
Steve Willens	

## Appendix B – List of Key Informant Interview Participants

Rob Adler

Thelma Lockwood

Jonathan Barnett

Rob Mack

Morris Bergman

Ellen Meyers

Rabbi Seth Bernstein

Rabbi Jordan Millstein

Daniel Bitran

Jay Pelletz

Howard Borer

David A. Persky

Rabbi Nachman Bruce

Rabbi Joel Pitkowsky

Rabbi Hershel Fogelman

Renee Rudnick

Andy Freedman

Shirley Siff

Marjorie Goldy

Lisa Sigel

Jodi Hirshman

Steve Slaten

Emily Holdstein

Gary Wolf

Avi Kaufman

## Appendix C – December 4 Leadership Retreat Participants

Robert Adler	Jordan Robbins
Rabbi Fred Benjamin	Bernie Rotman
Ellen Berezin	Hal Rudnick
Rabbi Seth Bernstein	Natalie Rudolph
Howard Borer	Rick Shrier
Stefanie Bradie	Steve Slaten
Rabbi Nachman Bruce	Lauren Smith
Micah Chase	Nina Stoll
David Coyne	Debbie Thomashow
Diane Davis	Irwin Thomashow
Deb Fins	Wayne Ushman
Howard Fixler	Suzan Ushman
Helene Freed	Gary Wolf
Emily Holdstein	Amy Wolfson
Rabbi Jordan Millstein	Cindy Wolpert
Jeff Narod	Olga Yorish
Rabbi Joel Pitkowsky	<i><u>UJC Consulting</u></i>
Mary Police	<i>Lauri Cohen</i>
Margie Potash	<i>Andy Paller</i>

## Appendix D – Bibliography and Resources

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