



**Strategic Plan: 01/01/19-12/31/21**





## 2019-2021 STRATEGIC PLAN: BACKGROUND

### **CASE FOR PLANNING**

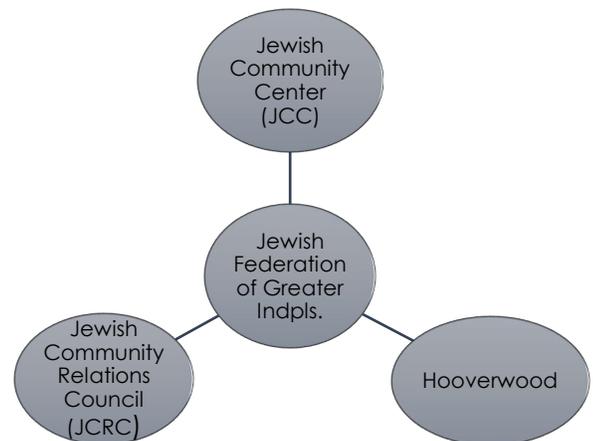
In January of 2017, the leadership of the Jewish Federation of Greater Indianapolis determined the need for a 3-5 year Strategic Plan with specific focus on creating a clear vision of the future for JFGI to result in meaningful and significant impact on the long-term vitality of the Jewish community through its agency-wide programs/services, both on-campus and off-campus. A critical outcome of this plan was an evidence-based allocation process to ensure JFGI funding decisions are most effectively used to meet the needs of the Jewish community and to assist in holding agencies accountable for defined outcomes.

### **Demographic Study**

To prepare for comprehensive strategic planning, in the spring of 2017 a community demographic study was conducted to complete a data-driven portrait of the Jewish community. The results of the study challenged a number of assumptions held, e.g. aging populations, need for additional classrooms, the zip codes of populations, the numbers of persons identifying as Jewish, etc. The results of this study were documented, published and distributed to the community in approximately 27 sessions to share the specific outcomes. Additionally, Federation staff was divided into teams to review the results, give meaning to the information in terms of impact to the Federation and the community, and begin creating responses.

### **Partner Agencies**

Since the first discussions of planning in early 2017, there were several changes in the structure of the agencies falling under the Federation umbrella. The Bureau of Jewish Education (BJE) closed at the end of the July, 2018, school year. Both the Jewish Community Center (JCC) and Hooverwood have new Executive Directors. Jewish Family Services has been a “department” of the Federation for a number of years, yet many stakeholders think of it as a stand-alone agency. The Jewish Community Relations Council (JCRC) is located in the Inter-Church Center near the IMA.



It is not the desire of the Federation to dictate the day-to-day workings of these entities; however, it is critical that the goals and plans of the agencies are aligned with the goals and plans of the Federation, i.e. autonomous but aligned.

## **Capital Campaign**

In 2016 the Federation created a working group made up of lay leaders to address the infrastructure needs of an aging campus. The plans are moving forward and the working group has engaged an architect to begin drafting drawings, but it is critical that the vision and goals of the Federation inform the plan.

## **Lilly Grant**

The Federation received a significant grant from the Lilly Endowment to help fund the strategic planning process and its desired outcomes. A preliminary timeline was created to align with the grant proposal, and this planning process must be able to prove outcomes to support the grant.

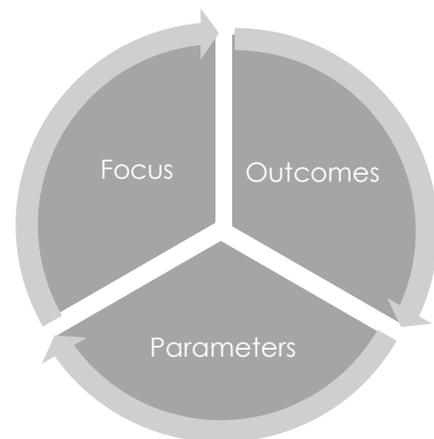
## **PLANNING GOALS AND PARAMETERS**

By January 2018, with the completion of the demographic study and approval of grant dollars, discussions began with the Federation planning team. Planning Plus, LLC, was selected to partner with JFGI to assist in designing and facilitating the process to develop a vision and long-term plan for the Federation. After gaining input from over 100 individuals the final **overall objective of this process** was to:

**Develop a clear and specific vision and long-term plan for the Jewish Federation of Greater Indianapolis to result in meaningful and significant impact on the long-term vitality of the Jewish community and the community at large, with strong alignment and collaboration among the Federation, the Synagogues, and its agencies.**

During the planning process, **specific consideration** was given to:

- A clear vision of the future for JFGI while retaining a healthy respect for the past.
- Collaborative relationships with our key stakeholders.
- Compassionate care for our most vulnerable, both locally and abroad.
- Engagement and support of the Jewish community, particularly in areas we have not reached.
- Cultural changes in our society and the rise of anti-Semitism.
- Board development needs, including relevancy of the current by-laws and existing governance structure.
- Laying a foundation for the 2024 Anniversary Celebration of the Federation.



**Outcomes** of this process were to include:

- A draft of **vision, mission and values statements** for further discussion with key stakeholders.
- A set of **defined strategic focus areas** with specific goals and action plans geared to planning years 1/01/19-12/31/21.
- An **evidence-based allocation model** to be used as one of several factors to determine resource allocation to the Federation agencies and departments and to assist in holding agencies accountable for defined outcomes.
- Guidance for **capital expenditures** and a basis for a future capital campaign.

- A **planning process** designed to assist **agencies/departments** in establishing key goals, objectives, and metrics that are aligned with JFGI goals and objectives.

The planning process **ensured the following parameters:**

- Broad participation by stakeholders;
- Use of the demographic study conducted in 2017;
- Adherence to the Lilly grant requirements.

## **COMMUNITY PLANNING VS. FEDERATION PLANNING**

The planning process was designed to set direction for the **Federation** and its **role in the community**, i.e. one entity within the community.

Based on the results of our focus groups, it is clear there are many members of the community who want a much larger conversation than the *role* of the Federation, i.e. **“what does it mean to be Jewish? How should we practice Judaism? How should we be educating our youth and who should do this? How do we respond to the evolving culture of Judaism, particularly as it relates to the next generation?”** These are deeply philosophical and emotional questions that cannot be answered via strategic planning for the Federation. The Federation is but one piece of the Jewish Institutional Puzzle in our community.



### **The Puzzle of the Institutional Jewish Community**

- **The Jewish Federation of Greater Indianapolis**
- **Synagogues and Congregations**
- **Partner Agencies/Beneficiary Agencies**
- **Other Service Organizations**

However, when asked about significant strengths of the Federation, overwhelming responses included that the Federation is the “face of the Jewish community, the umbrella organization, a vehicle for outreach, a community-wide representative, all encompassing,” etc. Couple those responses with the dissemination of the demographic study, and conversations in the planning retreat included *needs of the community balanced with the role of the Federation* in meeting those needs.

## **PLANNING PROCESS**

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### **PRE-PLANNING**

Planning Plus outlined a comprehensive pre-planning process to gain broad input in an efficient manner, which included focus groups, one-on-one interviews, telephone interviews, surveys, and a video conference. Stakeholders included board members of the Federation, agency leadership (CEOs and board presidents), donors, rabbis and congregation representatives, Federation staff, and the general community. As a result, we gained input from over 100 members of our Jewish community and used this input extensively in the planning sessions.

### **PLANNING STUDY GUIDE**

If a plan is truly to be strategic in nature, it is critical that the planning participants assess the environment in which the organization is operating, both externally and internally. Planning participants must have a shared understanding of the factors impacting the organization to aid in making decisions based on objective data vs. feeling/thinking.

A 64-page **Planning Study Guide** was created and disseminated to all attendees of our planning sessions. This **Planning Study Guide** contained information and included:

- National trends in Federations
- Legislative/political Issues impacting the Federation and its constituents
- Israel/overseas and the relationship with the Federation
- Key points of the demographic study and changes in national demographics
- Fundraising trends, including allocations to partner agencies and Jewish organizations
- Overview of partner agencies
- Overview of all current programs/services of the Federation
- Stakeholder perspectives

### **PLANNING SESSIONS**

Two planning sessions were conducted on June 5 and June 18, 2018. Critical discussions were formatted around small group work, and the outcomes of these discussions provided the foundation for the Strategic Plan.

### **PLANNING PARTICIPANTS**

To ensure a collaborative and meaningful plan, 45 representatives of key stakeholders included

- Members of the JFGI Board of Directors
- Lay Leaders
- Rabbis/Congregation Representatives
- Partner Agency CEO's and Board Presidents
- Federation staff

## **PLANNING REPORT**

Planning is a process and evolves over time. The first draft of the Strategic Plan was submitted in late June, and subsequent meetings with board officers and Federation staff focused on coming to consensus on the basic tenets and structure of the plan and the Executive Summary. This Summary was approved by board officers in late July and submitted to the full board for approval at the August 29 Board Meeting.

Now approved, Federation staff is continuing to work on the goals, impact assessments, action plans, and responsibilities to support the plan. Their work to date is reflected in this report.

# 2019-2021 STRATEGIC PLAN OF THE JEWISH FEDERATION OF GREATER INDIANAPOLIS

## Vision

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We **envision** a vibrant, engaged, and inclusive Jewish community where everyone is welcome. Grounded in Jewish values and with respect for our heritage, the Jewish community embraces change and innovation to creatively meet the evolving needs of a diverse and multi-generational population. We flourish as a community due to collaboration among all parties, including the Jewish Federation, synagogues, agencies and others to collectively strengthen our community. Strong financial support ensures the sustainability of our community and that those who are struggling, both locally and abroad, have the resources to survive and thrive.

## Mission

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The **mission** of the Jewish Federation of Greater Indianapolis is to promote the vision of a vibrant, engaged, inclusive and sustainable Jewish community by serving as its central philanthropic, planning, community engagement, and unifying partner. To fulfill our mission we:

- Collaborate with agencies, synagogues, and other organizations dedicated to the Jewish community.
- Encourage and support innovative programs and affiliations to address the stated needs of our community.
- Promote and support our local Jewish community.
- Continue our commitment to our Jewish communities in Israel and around the world.

**We welcome all to come to the table.**

## Values

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- *First and foremost, we ensure we are demonstrating our Jewish values of:*
  - Tikkun Olam: Repairing the World**
  - Tzedakah: Justice, Fairness, and Righteous Giving**
  - Gemilut Hasadim: Acts of Loving Kindness**
- **Collaboration:** we search for ways to work with our partners, recognizing our collective strength is a community asset. As we make decisions about services, programs, and events, we take care to consider the impact on our multiple stakeholders.
- **Compassion:** we recognize that many in our community struggle, both locally and abroad, and take special consideration to ensure we use resources to care for and protect those in need.
- **Diversity and Inclusion:** we welcome all members of our Jewish community and encourage a wide range of diversity of ideas, perspectives, and abilities.

- **Engagement:** we create ways to bring together members of our Jewish community locally and abroad, particularly those not currently connected or with limited touch points. We recognize the contributions of our seniors while recognizing the future is in our youth, and we take extra efforts to serve multi-generations.
- **Innovation and creativity:** as our environment changes we find new ways to meet the needs of and serve our Jewish community. We respect the successes of our past but also recognize that we must often change to continue the important work that we do.
- **Responsible stewardship:** we can only operate as the result of the generosity of others and make sure that dollars are used wisely and effectively, including funds directly from donors or other revenue sources. With both transparency and communication, we proactively inform our stakeholders of our work in fulfilling our mission, progress on mutual goals, and how we are serving the community.

## Funding Priorities

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*The examples below give a broad overview of the parameters of these various funding priorities but they are not restricted to these examples alone.*

### Engagement and Community Building

- Programs and events that increase **participation** by those not currently active in Jewish organizations or with limited touch points.
- Programs and events that increase participation and involvement in Jewish life by **youth/young adults**.
- Programs and events that foster **community building** and **bring members together**.
- Activities of community organizations that focus on **building bridges and partnerships, cultivating relationships**, etc.

### Jewish Education, Arts, and Culture

- Formal **Hebrew** education.
- Jewish **education and learning**, formal and informal.
- Events and programming that increase access to and appreciation of **Jewish art and culture**, as well as art and culture with a **broad community appeal**.
- Collaborative programs with **synagogues**.

### Social Services dedicated to Health and Welfare

- Programs and services that impact **quality of life**, i.e. physical health and fitness, emotional health, and financial health.
- **Medical assistance**, either in patient or outpatient.
- **Habilitation and rehabilitation:**
  - **Habilitation** refers to a process aimed at helping disabled people attain, keep or improve skills and functioning for daily living; its services include physical, occupational, and speech-language therapy, various treatments related to pain management, and audiology and other services that are offered in both hospital and outpatient locations.

- **Rehabilitation** refers to regaining skills, abilities, or knowledge that may have been lost or compromised as a result of acquiring a disability or due to a change in one's disability or circumstances.
- **Essential needs** of food, clothing, shelter.

### Support Israel and Overseas

- Subsidies for **trips to Israel**.
- Opportunities to **engage in relationships** with Israel and other Jewish communities.

### Leadership and Partner Development

- **Leadership and professional development programs** and events.
- **Technical Assistance for Partners**, including assistance with development, grant writing, planning, etc.
- **Board Development and Mentoring**.

## Strategic Focus Areas

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### **Strategic Focus Area: Engagement and Community Building**

***Promote a vibrant, diverse, and inclusive Jewish community through innovative engagement and community building initiatives.***

#### **Impact Assessment:**

- Feedback as provided through town hall meetings, anecdotal stories, one-on-one conversations, surveys, and increased board or committee engagement.
- Volunteer and financial engagement in the organization (moves mgmt.).
- Reporting by partner agencies and event organizers as to increase in engagement and participation.
  
- Identify **new and creative methods** to reach those **individuals not currently connected** to the Jewish community as reported in the community demographic study.
  - Develop Shalom Indy to reach out to those new to both the Federation and the City,
  - Develop programming for interfaith families.
  - Establish the Federation as an information “clearing house” to connect people to opportunities to engage in the Jewish community.
  - Establish the Federation as an information “clearing house” to connect people to volunteer opportunities throughout the Jewish community.
  - Utilize the new data base for tracking the outcomes and success of engagement initiatives.
  
- **Maintain and grow** personal and communal **connection to Jewish identity and Jewish life**. A *collaborative goal between Engagement and Jewish Education*.
  - Continue development of JFGI ExCITE, collaborating with and supporting the Jewish Learning and Experience strategic initiative.
  
- **Rebrand the Federation** as a neutral and non-partisan Jewish community resource for involvement and participation across the breadth of the Jewish community.
  - Restructure the marketing and communication function and processes of the Federation to reach a larger and more diverse population.
  - Develop communication media that meets a multi-generational population; e.g. print magazine, social media, “town halls,” etc.
  
- Ensure the **campus is designed as an exciting meeting space** that supports both new initiatives and goals of the strategic plan.
  - ***This is a significant undertaking and is under the purview of the Capital Campaign Committee. See also the Resource Development initiative.***
  - Ensure a successful Capital Campaign for facilities.
  - Explore the concepts and structure for Creative Placemaking.

## **Strategic Focus Area: Jewish Learning and Experience**

**Serve as a resource and facilitator in providing an array of meaningful Jewish educational and learning initiatives, both formal and informal, collaborating with others to address multi-generational needs.**

### **Impact Assessment:**

- Increase in participation in Jewish learning activities.
- Anecdotal and other qualitative/quantitative feedback about the personal effect on individuals engaged in programs.
- Increase in number of programs offered in collaboration among educational organizations.
  
- Ensure there are **Jewish learning and experiential opportunities** within the community for all ages in the community; work with partners to **close any gaps**.
  - Utilize JEdI Council to evaluate programming currently provided throughout the community.
  - Work with community partners to create new programming to meet unmet needs (i.e. intergenerational library programming w/Hooverwood & JCC ECE, interfaith family programming, Chai Mitzvah @ Marquette Manor, etc.).
  
- **Optimize educational experiences** as a tool to strengthen community ties, promote collaboration, and build new connections among community members.
  - Strategically utilize JFGI Education Collaboration Grants as a way to infuse new programming with a focus on community-building.
  - Develop and implement YoPhI with the support of JTFN and in coordination with other community partners.
  - Coordinate the implementation of Chai Mitzvah learning circles in our community.
  - Support community-wide learning experiences (such as Yom Ha-Atzmaut and J-Serve).
  - Act as a central coordinator for community wide programs as they present themselves (such as Brundibar opera).
  
- **Utilize education** as a mechanism for building bridges with others outside of the Jewish community through the provision of resources and development of programs that can be accessed by school and other institutions.
  - Implement a robust program of Holocaust Education Programming in Indianapolis and throughout the state.
  - Reconnect the BJE Library with the IndyPL Shared System.
  - Make presentations about Judaism for social studies classes.
  - Work with National Guard and other organizations to represent Judaism and Israel for diversity fairs.

## **Strategic Focus Area: Collaboration and Communication**

***Build stronger relationships and increase the level of collaboration and communication with synagogues, agencies, and other Jewish and community groups for maximum impact in the Jewish community.***

### ***Impact Assessment:***

- Results of collaboration in terms of 1) cost efficiencies and 2) serving the population.
- Feedback from synagogues and partner agencies regarding positive improvement in collaboration and working together.
  
- Identify areas where **Jewish groups** are already **collaborating** on programs/services to use as a model for additional and enhanced collaboration.
  - Use the LIFE & LEGACY program as a model
  
- Identify ways to **strengthen relationships** with **community groups and partners** to help support the goals of the Jewish community, e.g. CICF.
  - Identify successes to date and create list of 3-5 organizations to begin the relationship-building process.
  - Develop a professional advisor network to support this goal.
  
- Establish **regular forums** with feedback loops with stakeholders for meaningful dialogue about programs, events, and other information in order to discover areas for collaboration.
  - Continue to engage the synagogues and partner/beneficiary agencies to specifically talk about collaborating on programs, events, and other services.
  - Enlarge the Community Calendar to identify possible overlaps in programming and scheduling of events.
  
- Identify areas where **shared services and economies of scale** would have a return on investment for all participants.
  - Develop a best practices guide to help decision making about shared services, including examples from other successful Federations.
  - Develop a strategic approach to community security by establishing a system of community-wide collaboration, coordination, and communication.

## **Strategic Focus Area: Support for Needs Locally, in Israel, and in Jewish Communities around the World**

***Build and strengthen relationships with Israel and Jewish communities; respond to international emergencies as appropriate; and financially respond to needs locally, in Israel and overseas Jewish communities***

### ***Impact Assessment:***

- Anecdotal feedback regarding increase in international interpersonal relationships formed
  - Increase in participation in local Jewish community events by those who have engaged in travel abroad to share their experiences.
  - Increase in travel abroad by members of the Jewish community to Jewish communities around the world.
  - Increase of donor advised funds and reports on impact of dollars overseas.
  - Anecdotal feedback from local residents on how needs have been met and the impact on their lives.
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- Determine how the Federation can impact the lives of Jews around the world through **financial support**.
    - Encourage donor advised fund holders to support programs to meet the needs of this population.
    - Utilize the P&A process to determine the allocations to organizations supporting Israel and Overseas through the P&A allocation process, e.g. JFNA, JDC, JAFI, etc.
  
  - Provide opportunities to **connect and build relationships** with Israel and other Jewish communities and to engage in meaningful encounters with Israelis.
    - Identify ways to increase youth travel to Israel.
    - Support JCRC's Israel Engagement Fellowship.
    - Work with community partners to provide programming that increases learners' understanding of the complexity of Israel.
    - Collaborate on the educational aspects of Yom HaAtzmaut communal celebrations.
    - Provide educational resources to programs such as Learn2Gether.
  
  - Align **local support** with **needs identified** in the community demographic study.
    - Identify the specific local needs reported in the community study that can be met by Jewish Family Services and utilize the P&A process to request funding for costs not covered by grants and other outside sources, e.g. social services.
    - Collaborate with JCRC to identify local needs reported in the community study that can be met by JCRC, e.g. antisemitism.
    - Collaborate with JCC and Hooverwood to identify and meet the needs of our aging population.

## **Strategic Focus Area: Resource Development and Financial Sustainability**

**Ensure the sustainability of the Jewish community by raising, distributing, and providing fiduciary stewardship of the funds for the mission-driven initiatives of the Federation and the aligned needs of its partners.**

### **Impact Assessment:**

- Increase in numbers of donors and donor dollars for all development activities, i.e. Endowment, Annual, and Capital campaigns.
- Annual campaign \$4.5M by 2021, corporate sponsorships and grants \$500,000 by 2021.
- Increase in the endowment to \$120M by 2024, including both realized and unrealized.
- Meeting goals and deadlines for the Capital Campaign.
  
- Ensure continuation of funding by retaining current **donors**, maintaining renewals, and increasing the number of new donors to JFGI.
  - Implement current department plans for the Annual Campaign, Endowment, Corporate Sponsorships, and Grants, including actions to meet donor goals.
  - Improve relationships and communications with donors by providing a feedback loop on areas and issues important to them for funding decisions.
  - Continue to cultivate second/third generation donors to the Federation.
  - Implement new endowment software.
  - Explore ongoing opportunities for mission-based investing.
  
- Ensure **endowment funds** are responsibly invested to provide a maximum return on investment.
  - Continue quarterly reviews of investment returns
  - Conduct annual review of Investment Policy Statement.
  - Maximize investable assets within financial markets.
  
- Successfully conduct a **5-year Capital Campaign to increase endowments**, with goals to raise \$20M unrestricted, \$10M restricted.
  - Implement Capital Campaign plan
  
- Successfully conduct a **5-year Capital Campaign** to raise \$30M for **campus and facility improvements**
  - **See Engagement Initiative.**
  
- Identify **key funding priorities** and revise the current Planning & Allocation Process to ensure distributed dollars are impactful, aligned with the mission and funding priorities, and transparent in nature.
  - NOTE: working draft completed in August, will be shared with agency and partner leadership for feedback and input. New process will be implemented 2020.
  
- Develop and implement a **decision-making model** to assess both new and existing Federation programs to ensure alignment with the mission, financial sustainability, defined needs being met, collaboration in the community, and a return on investment.
  - NOTE: this model has been included in the new Planning & Allocation process for determining program funding by the Federation.

## **Strategic Focus Area: Leadership Development and Capacity Building**

***Ensure a strong and sustainable Jewish community by addressing the leadership and professional development needs of both individuals and organizations.***

### ***Impact Assessment:***

- Number of new board members to Jewish organizations who have not been engaged previously on any Jewish organization board.
  - Number of Jewish board members in the secular community, to help raise awareness of the Jewish community and bring back best practices.
  - Increase in ATID and retained participants in ATID, Yesod and NEXTGen and other affiliated programs.
  - Number of advisors cultivated and used who are available to supply expertise, guidance, and support to Jewish organizations.
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- Provide **leadership and professional development opportunities** to strengthen the skills and performance of **individuals** within the Jewish community, including specific focus on our youth.
    - Strengthen competencies specifically within the following groups:
      - Educational leaders and programs in our community through consultation, professional development opportunities, honoring outstanding education, and building communities of practice.
      - Lay leaders
      - Professionals working in Jewish organizations
      - Teens and youth
      - Federation staff
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- Serve as a **resource to constituent and beneficiary agencies** to assist with effective operational performance, including the areas of 1) organizational development, 2) board development, 3) leadership development.
    - Build an outside network of advisors to support all the agencies.
    - Tap into retired professionals who want to volunteer.
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- Support and strengthen a **pipeline of potential board members** and opportunities for board involvement to use across agencies.
    - Create a "board development" educational initiative, including mentorship strategies, to assist both current and future board members in their understanding of the roles and responsibilities of board members, committee structures, etc., and to keep them engaged.