

# Broader Impact. Deeper Connection.

Our Plan to Engage and Inspire our Changing Community.



# CJP Strategic Planning

## Co-chairs

Shira Goodman  
Cynthia R. Janower  
Jonathan M. Sandler

## Staff

Gil Preuss, *Executive Vice President*  
Elisa Deener-Agus, *AVP Strategic Initiatives*  
Molly Paul, *Project Specialist Strategic Initiatives*  
Jarasa Kanok, *Senior Manager Monitor Institute, Deloitte Social Impact*

## Strategic Planning Group

Geraldine Acuña-Sunshine  
Aron Ain  
Alex Berger  
Amanda Clayman  
Adam Eisenberg  
Pam Forman  
Ari Freisinger  
Joshua D. Friedman

Penny Goodman  
Judith A. Kaye  
Beth S. Klarman  
Daniel A. Kraft  
Steven D. Krichmar  
Liana Krupp  
Emily Leventhal  
Dena Boronkay Rashes

Boris Revsin  
Shira Ruderman  
Ilan Segev  
Edward Shapiro  
Judy Shapiro  
Robert J. Small  
Laurene M. Sperling  
Sam Wald

# CJP Strategic Planning Task Forces

## Caring Task Force

Catharyn B. Gildesgame, Chair	Howard Furman Thomas O. Levenberg
Randi Berkowitz	Meggan Levene
Amy S. Berylson	Jeffrey Schwartz
Alice Braunstein	Ellen Segal
Margot Davis	Reva Tankle
Abby Flam	Candice Wolk
Jay Freedman	

## Engaging the Next Gen Task Force

Alan Crane, Co-chair	Julie Judson
Rickie Golden, Co-chair	Neal Karasic
Jonathan Shapira, Co-chair	Brooke Patkin
Michelle R. Black	Osher Perry
Victor Dubinsky	Trevor Pollack
Lara Freishtat	Susan Salgan
Clarence Friedman	Courtney Sharpe
Eli Gurock	Zachary Wainwright

## Jewish Learning & Engagement Task Force and Related Work Groups

*(Adult Learning, Day Schools, New Transformative Ideas, Strategic Grant Making, and Teens)*

Alan Crane, Co-chair	Yoni Engelhart	Sari Korman	Alex Sagan
Allison Hirsch, Co-chair	Steven G. Finn	Harold G. Kotler	Matya Schachter
Sara Bernstein	William Foster	Wendy Kraft	Anne Selby
Michelle R. Black	Tamar Frieze	Frank E. Litwin	Yakir Siegal
Michael J. Bohnen	Zev Gewurz	Joshua Margolis	Laurene M. Sperling
Hope Casey	Beth Greenberg	Marilyn Okonow	Lauri Union
Scott Cohen	Sheri Gurock	Lori Polachek	Sam Wald
Arieh Coll	Elizabeth Jick	Danielle Remis Hackel	Robin Wolk
Alec Eidelman	Jane Kanarek	Howard Rodenstein	Yosef Zweibach

## Israel & Overseas Task Force

Lawrence J. Goodman  
Betsy Hecker  
Leslie Pucker  
Sari Anne Rapkin  
Benjamin Sigel  
Jill Smith  
Luis A. Vidal

## Strategic Israel Engagement Task Force

Lawrence D. Greenberg, Co-chair  
Ben Pearlman, Co-chair  
Lisa F. Wallack, Co-chair  
Michelle R. Black  
Michael J. Bohnen  
Geoffrey H. Lewis  
David Rontal

## Tzedek Task Force

Bill Gabovitch  
Lesley Inker  
Cynthia R. Janower  
Rebecca Leventhal  
Sari Anne Rapkin  
Philip R. Rosenblatt

# Executive Summary

## Our Context Today: Building on our Strengths to Meet a Changing Community

**Combined Jewish Philanthropies has been bringing together people, partners, and resources to both lead and serve Greater Boston's Jewish community for more than a century.** As one of the most innovative and successful Jewish federations in North America, CJP seeks to establish a community that is rooted in compassion and justice, that cares for the vulnerable, that engages deeply with Israel, and that embraces Jewish life and learning -- all with a focus on engaging the community in vibrant Jewish life, both now and in the future. **We are a leader in this work because we prioritize innovation, effectively engage our community, and raise funds based on a compelling vision for the future tied to clear strategies. All of these strengths must be called upon and reenergized to meet a new set of challenges.**

### Jewish life is changing

The world is changing rapidly, with technological, demographic, attitudinal, and societal trends reshaping the needs of our community. The 2015 Greater Boston Jewish Community Study revealed startling changes in our community over the past 10 years: **re-urbanization** (where there are relatively few synagogues and traditional Jewish institutions); significant shifts in **denominational affiliation**; and a **diversity** in our **backgrounds** (many more Israelis and Russians), in our ways of **engaging**, and in the sources from which we derive meaning. Most significantly, **young adults** are coming of age in a unique context that shapes their values: almost half are children of interfaith parents, many are skeptical about particularism and suspicious of conformity and institutionalism. They seek transparency, spirituality and connection. There is a strong desire to express their Judaism through social justice efforts. Through Birthright and other programs, three-quarters have travelled to Israel. Some are deeply committed to the Jewish future while others question the value of Jewish community altogether.



## Our Context Today: Building on our Strengths to Meet a Changing Community

As societal trends change how people engage with one another, some people find that our traditional institutions lack meaning and inspiration for them. While successful synagogues and other organizations continue to create vibrant communities for many in our community, there is also a growing interest – particularly among Israelis, Russians, LGBTQ and young adults – in new spiritual and cultural outlets. New means of engagement must be explored and fostered.

Moreover, Israel – once a source of unifying pride for American Jews – has become a polarizing topic, or entirely irrelevant, for many in our community. We must foster broad engagement of diverse viewpoints with each other and with Israel. And we must inspire those who do not see Israel as relevant to their lives, to understand its profound significance to the Jewish people.

**These important changes in the structure and character of Jewish life will shift how we must engage and support our community.**

# Our Context Today: Building on our Strengths to Meet Changing Philanthropy

## Philanthropy is changing

There are also significant shifts in how people approach philanthropy— both in Greater Boston, and across the country. **Donors are increasingly results-focused and data-driven. Seeking to feel the impact of their gifts, they prefer directed giving over donating unrestricted funds to large umbrella organizations. Millennial donors approach philanthropy with a particularly global, social and inclusive outlook.** Consistent with these trends, CJP has lost donors in the lower ranges and experienced flattening gifts at the higher ranges. Our campaign has grown thanks to expanding designated gifts by a small number of donors, while unrestricted giving has remained flat, donor rolls have declined, we have lost share of our wealthiest donors' philanthropic giving, and we have felt increasingly challenged to convey our relevancy to new (and younger) high-capacity donors.

These shifts have put increasing pressure on CJP's business model. We maintain a complex and costly organizational structure to support the many distinct roles that we play. CJP operations have been growing faster than our growth in available unrestricted resources. The result is that despite historically high annual campaigns, we have had to cut staff and programs that rely on unrestricted resources by between \$500K-\$2M per year for the past several years.

**If we do not take action now to respond to these changes, the Boston Jewish community, and CJP's ability to support it, will face a crisis over the next decade.**

# Our Context Today:

## Our Enduring Vision and Aspirations Require Us to Adapt

### Our community's aspirations remain fundamentally unchanged

People have profound human desire for connection and meaning, and Judaism has much to teach us about ourselves and the world around us. **CJP's mission is as critical as ever.**

**The Greater Boston Jewish community's enduring vision is of an open, inclusive, and diverse community in which Judaism's rich history, traditions, and values provide a sense of meaning and purpose, now and for generations to come.** We aspire to be a community that ensures that those in crisis have access to services that help them move to stability; that acts on our Jewish values to build a more just and peaceful world; that connects people to Jewish life and learning; that is informed, engaged, and empowered to effectively engage with Israel's future; and that collaborates across institutions to create positive and meaningful change on the challenges our community faces.

### In order to advance our community's aspirations, CJP must focus on our unique strengths to adapt to the changing context of our work

CJP is in a unique position to both inspire and mobilize our community here in Boston – and to model new approaches for other communities across the US. We are the only Jewish organization in Boston that can work across our whole community to:

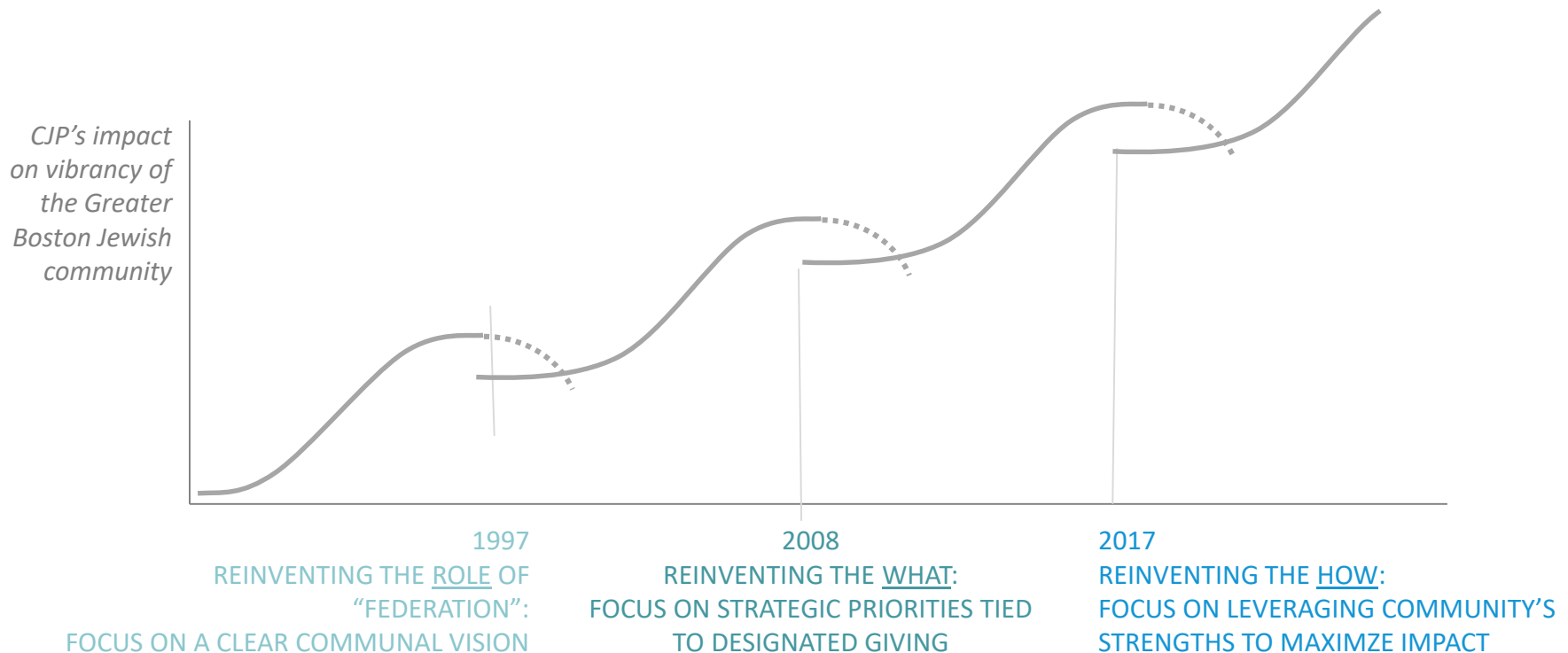
- cultivate broader and deeper **Jewish engagement**;
- foster **community innovation** to find solutions to pressing problems;
- **scale solutions** across community institutions through coordinated **strategic ventures**; and,
- bring together resources with a community-wide perspective to enhance the **connections, capacity and resiliency** of Jewish Boston.



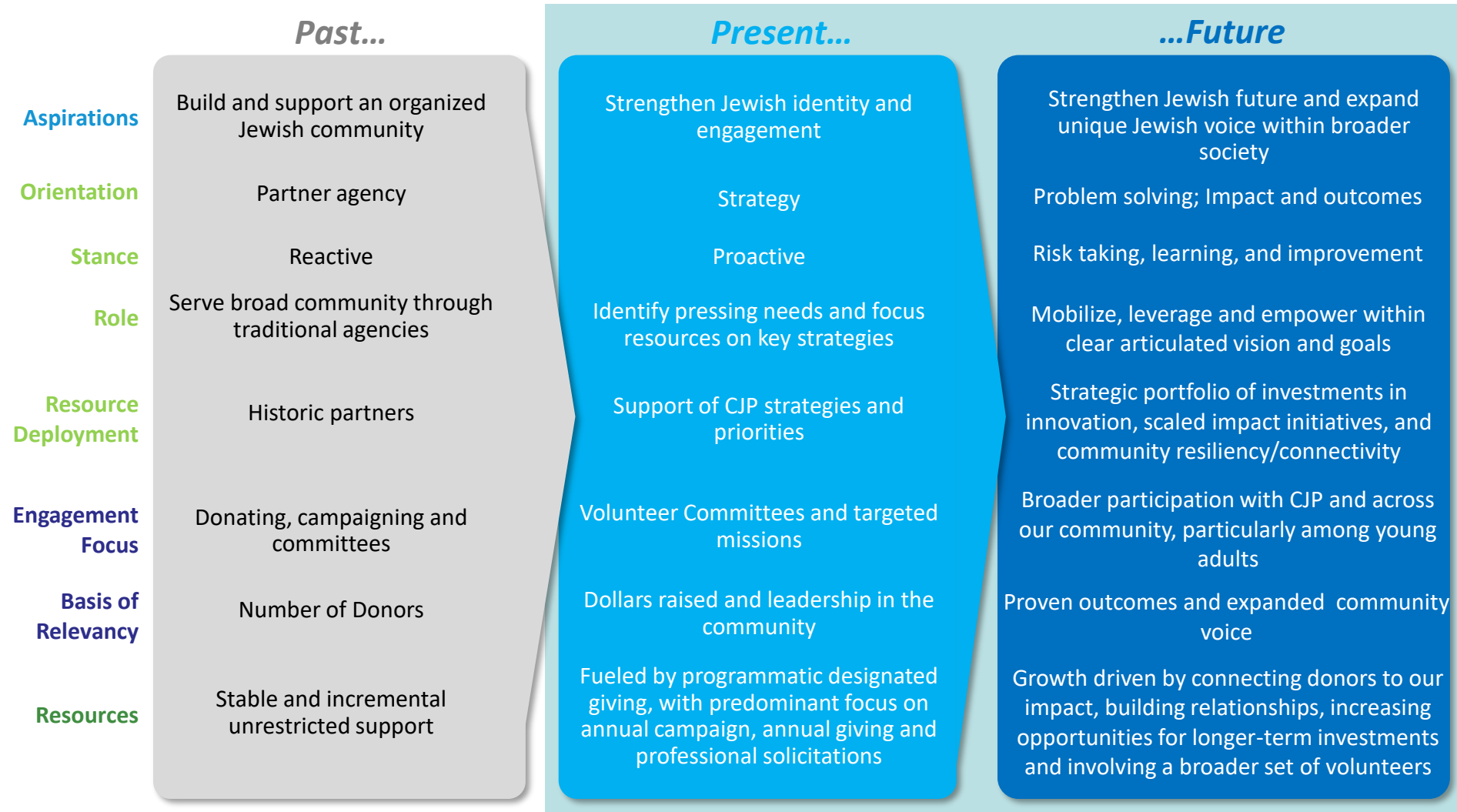
# Adapting to Remain at the Leading Edge of Jewish History

We must make these strategic shifts in how we are structured and how we work to realize our community's potential.

CJP must be the bridge between where we are today and where we want to be tomorrow -- because we can bring people together, because we can inspire our community, and because we have proven that we can transform ideas into impact. Our new strategic framework will ensure that CJP – and the Greater Boston Jewish community – remains on the leading edge of Jewish history.



# Evolving to Meet the Needs of a Changing Community: A Summary



# Specific Recommendations

Our current business model is based on a set of outdated assumptions about demographics, how and why people engage, and what drives philanthropy. We must substantially evolve our model to address how we cultivate our community and how we work internally. **Therefore, we recommend the following strategic shifts:**

## Focus our activities on the four unique roles we play in community

Bring together people, partners and resources to:

- Cultivate broader and deeper Jewish engagement across our community
- Enhance connections, capacity, and resiliency across our diverse community
- Prioritize, convene, and organize strategic philanthropic ventures against explicit outcomes
- Foster community innovation to create solutions for tomorrow's needs

## Invest in a portfolio of solutions to achieve targeted outcomes in a test & learn approach

- Clearly articulate community needs and measurable outcomes; track and communicate progress against those outcomes
- Shift to a culture of test, learn, & iterate
- Allocate against five impact areas (Caring, Justice, Learning & Living, Israel, Community) an **intentional mix of investments** in (1) core community capabilities & connections, (2) strategic ventures, and (3) innovation pilots

## Broaden and deepen engagement in our work and in the broader Jewish community

- Build stronger mechanisms for broad outreach to diverse populations
- Partner with others to support deep Jewish engagement
- Intentionally seek broad community voice and input
- Adapt CJP's volunteer structures to a new engagement model

## Connect donors with each other, with content, and with CJP through longer time horizons

- Connect our donors to our impact
- Build relationships, not transactions
- Increase opportunities for longer-term investment
- Re-align our operations

# Where We are Going Next

The strategic shifts indicated in this plan will take multiple years to fully implement. We will focus FY18 on building foundations for the future through further strategy development at the program level and specific investments to build critical organizational capabilities.

FY2018  
*Build foundations for the future*

This will be a year of building the internal foundations and scaffolding that will allow CJP to shift to new modes of operating:

- **Further refine programmatic approaches within our five impact areas** to reach our outcome goals – and **further develop and implement new approaches to engagement and resource development**, particularly with most critical stakeholders:

- 1 WORDSMITH VISION & MISSION LANGUAGE
- 2 DEFINE SPECIFIC IMPACT STRATEGIES & TACTICS
- 3 DEFINE ENGAGEMENT STRATEGIES & TACTICS
- 4 DEFINE DEVELOPMENT STRATEGIES
- 5 OPERATIONAL CHANGES

- Invest to build CJP's capabilities in:
  - Measurement & evaluation
  - Communication & engagement
  - Resource development

FY2019  
*Make targeted investments*

FY19 will be a year of targeted philanthropic investments in the most promising ideas developed in FY18 – and sunsetting of investments not aligned with our impact goals

- 1 large-scale strategic venture
- 1-2 additional smaller-scale innovation initiatives
- Realign community (*kehilla*) investments
- Clear measurement and evaluation approaches underpinning the above
- Expanded implementation of new engagement and resource development approaches

FY2020 and beyond  
*Create long-term impact*

Assuming continued support of the strategic priorities defined in FY17-FY18 by new leadership, we intend to come out of the transition engaging a **broader network of people and partner organizations** in advancing our five impact areas across our community, and, with CJP having the **capacity, structure, and refreshed business model** to support the Greater Boston Jewish community

# Detailed Strategy Frameworks

# OUR VISION FOR OUR COMMUNITY

## OUR COMMUNITY VISION IS ENDURING...

The Greater Boston Jewish community's enduring vision is of an open, inclusive, and diverse community in which Judaism's rich history, traditions, and values provide meaning and purpose, now and for generations to come. Through the 2016-17 strategic planning process, our community has reaffirmed the importance of caring for the vulnerable, Jewish life and learning, and engaging with Israel.



## ...BUT OUR ASPIRATION AS A COMMUNITY HAVE GROWN

- We seek to address society's most pressing challenges by acting on Jewish values of justice and compassion.
- We believe in the importance of investing in the resiliency of our community.
- We believe in the importance of recognizing, and engaging with the rich diversity within our community.

## ...AND OUR AIMS CAN BE MADE MORE EXPLICIT

- Beyond a high-level vision for our community, we will explicitly identify and articulate the problems we are focused on solving.
- Shifting to a problem-solving orientation enables us to define what our overarching objectives and goals for CJP are, while becoming a more adaptive and nimble organization in how we achieve them.

— *additional detail on following pages* —



# Our Vision for the Greater Boston Jewish Community



*Our vision is for a vibrant, inclusive Greater Boston Jewish Community that embraces diversity and builds communities of meaning and purpose for current and future generations.*

We create this community by caring for the needs of the most vulnerable Jews; by working more broadly for justice and peace; by embracing Jewish learning and living; by engaging with Israel; and by investing in our community's capacity, through strong connections, effective leadership, and sufficient resources to realize its bold aspirations.

# Making Vision Explicit: Aspirations for the Problems We Are Addressing



## JEWISH ENGAGEMENT

*We aspire to an open, inclusive and diverse community in which Judaism's rich history, traditions, and values provide a sense of meaning and purpose, now and for generations to come.*

*The landscape of the Greater Boston Jewish community is evolving. Traditional means of engagement do not resonate across all the diverse segments of our community. Too many people, particularly young adults, are unable to find meaning in Judaism, or connect with Jewish life and community.*

**How can we enable our diverse community to experience and participate in the richness of Jewish life?**

## ACROSS FIVE IMPACT AREAS

### CARING *chesed* חסד

*We aspire to a community where every person in need can find help, with dignity and ease. By ensuring that services are available and accessible, we will build a stronger, more inclusive, and more caring community.*

*In Boston today, far too many members of our community are struggling to get by and unable to access critical services during times of crisis.*

**How can we ensure that every vulnerable person has access to the services to move from crisis to stability?**

### JUSTICE *tzedek* צדק

*We aspire to broaden opportunities to bring a Jewish perspective to tackle our society's most pressing issues.*

*There is a deep yearning for more opportunities for effective action as Jews in community and in partnership with others to act on Jewish values to build a more just and peaceful world.*

**How can we provide opportunities for effective action as Jews to collectively build a more just and peaceful world?**

### LEARNING & LIVING *torah* תורה

*We aspire to a culture of learning, with a breadth of compelling offerings, that encourage people to grapple with profound questions, foster a community of thoughtful peers, and enrich our lives.*

*Judaism has much to teach us about ourselves and the world around us. Too few people have the opportunity to access and connect with the richness of Judaism that is relevant to who they are today.*

**How can we connect more people to Jewish life and learning to enhance their lives and shape who we are as individuals and as a community?**

### ISRAEL *ישראל*

*We aspire to be a community, in its diversity, deeply engaged with Israel and its people. We will foster broad engagement of diverse viewpoints with each other and with Israel and inspire people to recognize Israel's profound significance to the Jewish people.*

*Increasingly, segments of the Boston Jewish community do not see Israel as relevant to their lives as Jews, while for others it has become a source of tension and conflict.*

**How can we inform, engage, and empower our community to effectively engage with Israel's future?**

## COMMUNITY *kehilla* קהילה

*We aspire to a stronger and more vibrant community that engages more perspectives, affects real and meaningful change, and is resilient in the face of internal and external crises. We will invest in fostering strong community organizations, greater collaboration and cooperation across our community, and, in building strong cohorts and networks of community leaders.*

*We are not fully leveraging the breadth and depth of resources in our community to accomplish our collective vision of vibrant Jewish life.*

**How can we strengthen our community so it is more cohesive, connected, and resilient?**

# OUR ROLE & HOW WE CREATE IMPACT

## REFINING CJP'S MISSION...

As the broader context for CJP's work changes, from changing demographics within our community to disruptive trends in broader society, we must adapt to have greater impact in realizing our community's vision and aspirations.

Across our community, institutions that orient themselves towards creating meaningful impact and outcomes will remain relevant and valued, while institutions that do not will lose support. Similarly, to solve the problems we care most deeply about, reactive responses will do little to move the needle. Rather, we must adopt a greater degree of proactive risk-taking, learning, and improvement to find approaches that represent scalable solutions to our challenges.

As the only Jewish organization in Boston that can work across our whole community, CJP is positioned to play critical and unique roles that strengthen our community. However, we have not focused our work on, or always effectively conveyed, the unique roles we play.



## ...TO FOCUS ON IMPACT

- Clarity around the unique roles CJP plays in our community will ensure that we are focusing our efforts on the kinds of work where we can have the greatest impact.
- By managing our philanthropic investments as a strategic portfolio that addresses specific impact areas through different kinds of investments, we can better grow, mobilize, and align our community's resources to confront our community's most pressing issues.
- We can better articulate CJP's unique position within our community to both inspire and mobilize our community here in Boston – and to model new approaches for other communities across the US. We must continue strengthening our ability to explicitly articulate our unique role in catalyzing community-wide impact.

— ***additional detail on following pages*** —

# CJP Mission & Role



CJP's mission is to **inspire** and **mobilize** the diverse Boston Jewish community to **engage** in building communities of learning and action that strengthen Jewish life and improve the world.

## THE UNIQUE ROLES WE PLAY IN THE COMMUNITY

CJP brings together people, partners, and resources in common purpose – holding ourselves and others accountable against measurable outcomes – to achieve our community's vision and serve as a national model. Specifically, we:

### 1 Cultivate broader and deeper Jewish engagement across our community

A strong Jewish future requires focused effort to broaden and deepen the engagement of diverse segments and future generations in Jewish life. CJP introduces people to the breadth of our community and offers pathways to deepen individual engagement.

### 2 Enhance connections, capacity, and resiliency across our diverse community

In the face of socio-economic, demographic, and political trends that threaten to divide us, CJP unites and strengthens our community while fostering civil discourse and pluralism. We encourage greater coordination and collaboration among our organizations and leadership, and invest in strong and resilient partners.

### 3 Prioritize, convene, and organize strategic philanthropic ventures against explicit outcomes

Our community faces issues that are bigger than any one group or organization can solve alone; CJP convenes leaders, organizations, and resources to tackle these issues and maximize our impact.

### 4 Foster community innovation to create solutions for tomorrow's needs

Sustaining a Jewish community of meaning and purpose in the long-term demands that we rethink our core institutions and programs. CJP facilitates and drives innovation – by identifying, funding, and supporting emergent innovative efforts across the Boston Jewish community and amplifying the ideas that work.



# Guidrails for a New Approach: From Vision and Mission to Impact

The intersection of our Community Vision and CJP's Mission & Roles sets guiderails for our future work

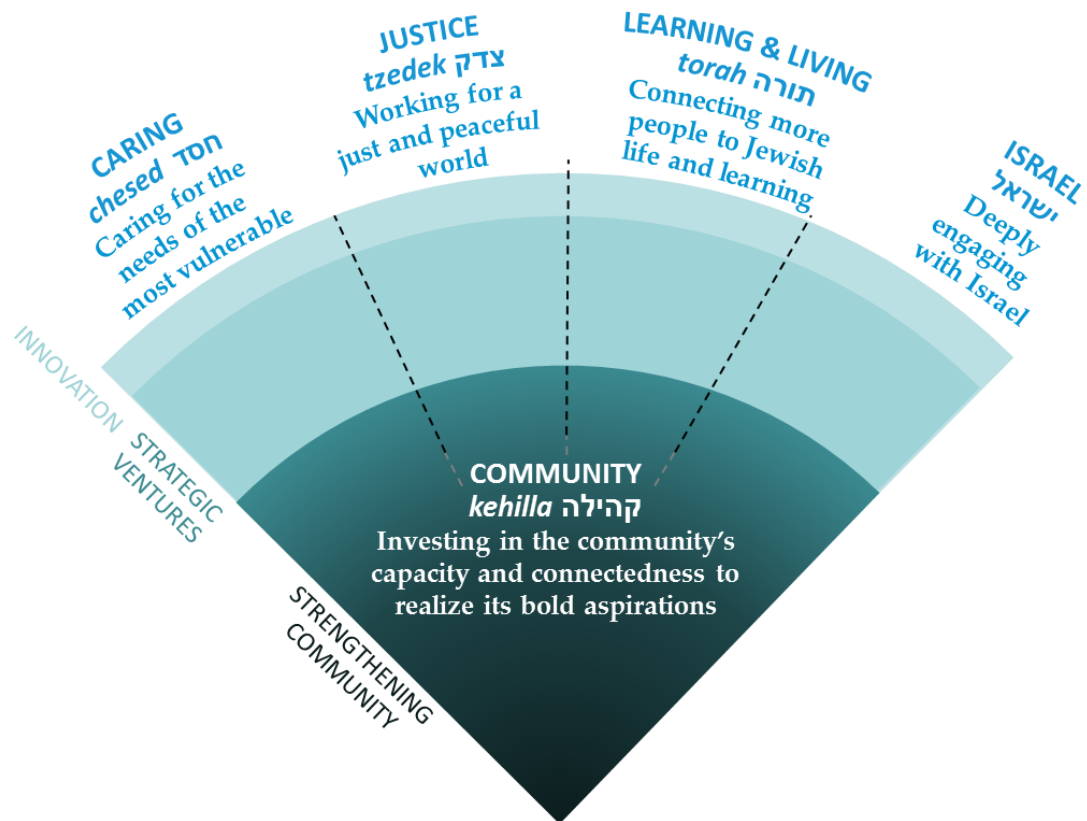
## COMMUNITY VISION

Our vision is for a vibrant inclusive Greater Boston Jewish Community that embraces our diversity and builds communities of meaning and purpose for current and future generations. We create this together by:

CJP brings together people, partners, and resources in common purpose – holding ourselves and others accountable against measurable outcomes – to achieve our community's vision.

- Cultivate **Jewish engagement**
- Foster **community innovation** to solve specific problems
- Take the lead in **strategic ventures** that scale solutions
- Enhance **community** connections, capacity and resiliency

## CJP MISSION & ROLES





# The new strategy calls for a mix of 3 distinct types of investments, described below:

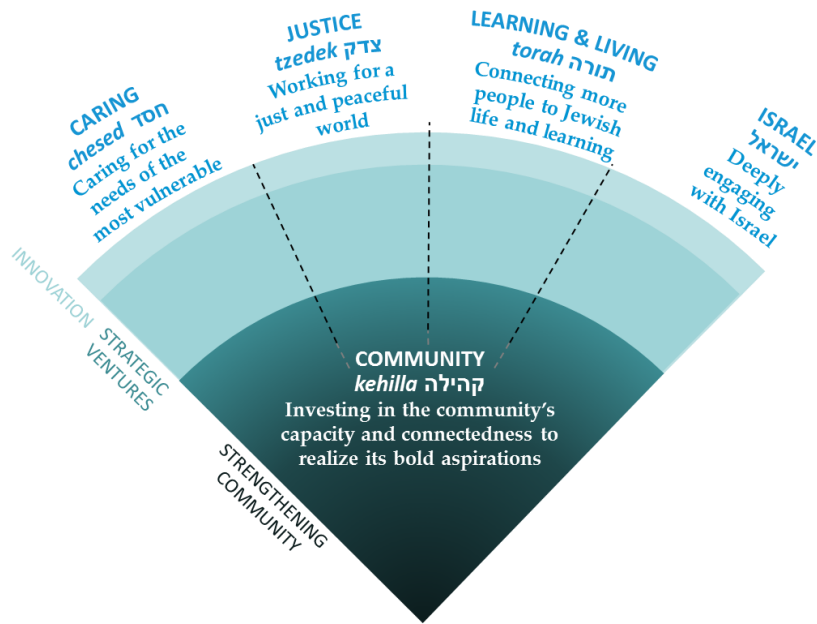
	<u>Why</u>	<u>What and How</u>
<b>INNOVATION</b>	<ul style="list-style-type: none"><li>• Demographic and attitudinal changes require new solutions for community needs</li></ul>	<ul style="list-style-type: none"><li>• Piloting new solutions from across the community to solve intractable problems</li><li>• Adopting &amp; adapting programs with demonstrated success from other venues</li><li>• Driving a test, learn and iterate culture</li></ul>
<b>STRATEGIC VENTURES</b>	<ul style="list-style-type: none"><li>• Our most critical problems and biggest opportunities can only be solved through collaborative efforts</li></ul>	<ul style="list-style-type: none"><li>• Identifying, convening, and funding partners to scale promising solutions</li><li>• Measuring results and refining our approach accordingly</li></ul>
<b>STRENGTHENING COMMUNITY</b> <i>(kehilla)</i>	<ul style="list-style-type: none"><li>• A vibrant community requires strong organizations and leaders with capacity and connections to address community issues</li><li>• Enables CJP to be engaged with the breadth of Jewish organizations, gaining deeper knowledge and insights in support of community aims</li></ul>	<ul style="list-style-type: none"><li>• Strategically allocating resources to support:<ul style="list-style-type: none"><li>– Vital community infrastructure and networks</li><li>– Effective organizations</li></ul></li><li>• Convening the community to share learnings and achieve collective impact</li></ul>





## Managing Our Portfolio for Growth & Impact

Managing our work as a portfolio of investments in innovation, strategic ventures, and community-strengthening will allow us to grow the overall resources we raise, and, to use those resources more efficiently to achieve greater impact and long-term change



- **A portfolio approach** allows CJP to prioritize decisions across our five areas of focus
- **Different forms of philanthropic investment** (e.g., innovation, strategic ventures, community) allow us to achieve different kinds of outcomes and connect donors and volunteers in our work in more customized ways
- **We anticipate *overall* growth in resources and impact, and a change in *relative* mix:**
  - For innovation: moderate growth in this kind of investment and the impact these resources create
  - For strategic ventures: significant growth in this kind of investment and in the resulting impact that enables long-term community-level change
  - For Community (kehillah): moderate growth in this kind of investment with some realignment to generate more impact



# Mission & Role: Summary

All CJP activities should be clearly grounded in the unique roles that only we can play in the Greater Boston Jewish community, specifically, bringing together **people, partners** and **resources** to:

- 1 Cultivate broader and deeper Jewish engagement across our community**
  - Use our unique community-wide perspective to ensure that we have **effective ways to introduce people to the breadth of our community** and **pathways to deepen individual engagement** in Jewish life
- 2 Enhance connections, capacity, and resiliency across our community**
  - **Foster greater coordination and collaboration** among Greater Boston Jewish organizations and leadership
  - **Invest in strong partners** who play important roles in building overall community capacity and resiliency
- 3 Prioritize, convene, and organize strategic ventures against explicit outcomes**
  - **Leverage our unique ability to convene leaders, organizations, and resources** in tackling community-wide issues that are bigger than any one group or organization can solve alone
- 4 Foster community innovation**
  - **Learn about and amplify effective approaches** to solving community issues, by identifying and supporting emergent innovations across the Boston Jewish community and cultivating a test, learn and iterate culture
  - **Pilot** new approaches by funding initiatives that address specific community challenges, with explicit measurement and evaluation for impact and scalability

# SETTING OUTCOME GOALS

## INCREASING OUR IMPACT-ORIENTATION...

As CJP moves to leverage community resources to support and strengthen **innovation**, grow effective **strategies to scale what works** and build a more **resilient and integrated community**, success will require a nimble and adaptive culture focused on a clear set of outcomes. This shift aligns with expectations in our community for institutions to adopt a more proactive, impact-oriented approach. Consequently, CJP must set clear outcome goals, and institute measurement and evaluation capabilities to support ongoing learning.

Throughout the 2016-17 strategic planning process, community members, partner organizations, and donors expressed an expectation that CJP consistently target, hold itself and others accountable to, and communicate against, explicit and measurable outcomes. Setting targeted outcomes as goals for the organization will further guide CJP's approaches, tactics, philanthropic investments, and priorities.

## ...IN ALL ASPECTS OF OUR DECISIONS & WORK

CJP should set specific impact for its work based on specific problems and challenges identified by the community. These explicit outcome goals allow CJP to:

- Define what success & impact looks like
- More compellingly communicate our impact and outcomes to donors and the community
- Spur innovation and creativity to address our most critical challenges
- Evaluate tradeoffs and make clear decisions about what CJP will and won't do
- Assess our progress over time and adjust our specific approach and tactics based on what we learn about the solutions that work

Explicit goals clarify the activities that CJP must stop doing or reject.

*— additional detail on following page—*

# Outcome Goals: Draft measurable targets

We will further evolve our measures as we detail the strategies

## JEWISH ENGAGEMENT

across the five impact areas below,

**How can we enable our diverse community to experience the richness of Jewish life?**

Example:

- Increasing % of people who feel part of a Jewish community within Greater Boston -- overall and young adults
- Increasing % of people who regularly participate in a Jewish activities
- Increasing % of households (with at least one Jewish adult) that are raising Jewish children

### ACROSS FIVE IMPACT AREAS

#### CARING chesed חסד

**How can we ensure that every vulnerable person has access to the services to move from crisis to stability?**

Example:

- All individuals & families who reach out in need can easily access services that will move them from crisis to greater stability

#### JUSTICE tzedek צדק

**How can we provide opportunities for effective action as Jews to collectively build a more just and peaceful world?**

Example:

- Increasing % of people who take action on issues they are passionate about as an expression of their Jewish values and identity

#### LEARNING & LIVING torah תורה

**How can we connect more people to Jewish life and learning to enhance their lives and shape who we are as a community?**

Example:

- Increasing % of individuals & families engaged in at least 1 substantive Jewish learning experience – Youth, College students, Young Adult and Adult
- Number of individuals who move from awareness to participation

#### ISRAEL ישראל

**How can we inform, engage, and empower our community to effectively engage with Israel's future?**

Example:

- Increase % of individuals who have a strong connection to Israel and its people

### COMMUNITY kehilla קהילה

**How can we strengthen our community so it is more connected, collaborative, and resilient?**

Example:

- Strong, healthy community institutions (financial, governance, membership, etc.)
- Increasing collaborative initiatives within community
- Strong, healthy community leadership networks & capacity
- Increased total dollars raised by Boston Jewish organizations



Within each impact area, CJP creates these outcomes and moves key performance indicators by defining clear strategies & approaches which specify the inputs, activities, interim outputs, and target goals that help us progress towards these outcomes.

# Impact & Outcomes: Summary

Invest in a portfolio of solutions to achieve targeted outcomes in a test & learn approach



## 1 Clearly articulate community needs and measurable outcomes

- **Define explicit outcome goals** that allow CJP to more compellingly communicate our impact, spur innovation and creativity in finding effective solutions, evaluate tradeoffs and make clear decisions
- Use these outcome goals **to track our progress**, and **to inform decisions** about how to most effectively use CJP and community resources

## 2 Shift to a culture of test, learn, & iterate

- **Promote an organizational culture within CJP of test, learn, and iterate** that allows us to more regularly assess our progress over time and adjust our specific approach and tactics based on our learnings
- **Invest to build CJP's capabilities in measurement** to more effectively evaluate our overall impact and our progress against specific outcomes and targets by defining appropriate measurement techniques and continuous improvement of internal practices and processes

## 3 Allocate using a portfolio approach

- Make decisions on CJP's programming and funding allocations that create a **deliberate mix across our five impact areas** (Caring, Justice, Learning & Living, Israel, Community), **using different forms of investment** (core community capabilities & connections, strategic ventures, and innovation pilots)

# BROADENING & DEEPENING ENGAGEMENT



## HOW PEOPLE ENGAGE IN COMMUNITY LIFE IS CHANGING...

Over the past twenty years, CJP has supported and built new mechanisms to engage the Jewish community in the richness of Jewish life through synagogues, adult learning, day schools, Jewish camping, Israel trips, etc. These initiatives have proven vital to strengthening our community.

We are now in the midst of changes in how people engage with each other, with community and with institutions. Formal religion is playing a decreasing role in American lives across all generations. Young adults are coming of age in a unique context that shapes their values: almost half are children of interfaith parents, three-quarters have travelled to Israel, many are skeptical about particularism and suspicious of conformity and institutionalism. Our community is also diverse, with significant Israeli and Russian segments, each with its own characteristics and engagement patterns.

Nonetheless, people continue to seek spirituality and connection. Many continue to find meaning and community within vibrant traditional institutions, while others, particularly millennials, increasingly seek out other outlets for engagement, both within and outside of the organized Jewish community.

For many, engagement with CJP is in and of itself an important expression of Jewish identity and engagement. Given that connection, we must seek to evolve our organizational engagement strategies to address the myriad ways that people engage in Jewish life.

## ... WE MUST SUPPORT DIVERSE WAYS OF EXPERIENCING JEWISH LIFE

As people seek connection and community through traditional models and new approaches, we must find new ways to enable our diverse community to experience the richness of Jewish life.

- We can no longer assume that individuals will follow the same pathway for engaging in community life. Instead, we must understand how to most effectively engage individuals at different points, from discovery to participation to deeper contributions and involvement
- We have historically used “engagement” as an umbrella term that encompasses different ways of connecting to Jewish community. Going forward, we must be clear on how we create new ways to build initial points of engagement with Jewish life, how we then deepen involvement over time, and the five different roles CJP should play in cultivating engagement.
- To maintain our relevancy and effectiveness as a community organization, CJP must create opportunities for donors, volunteers, and others across our community to connect with one another, to build community, to bring in diverse perspectives into our work, and to contribute to CJP’s work in meaningful volunteer roles.

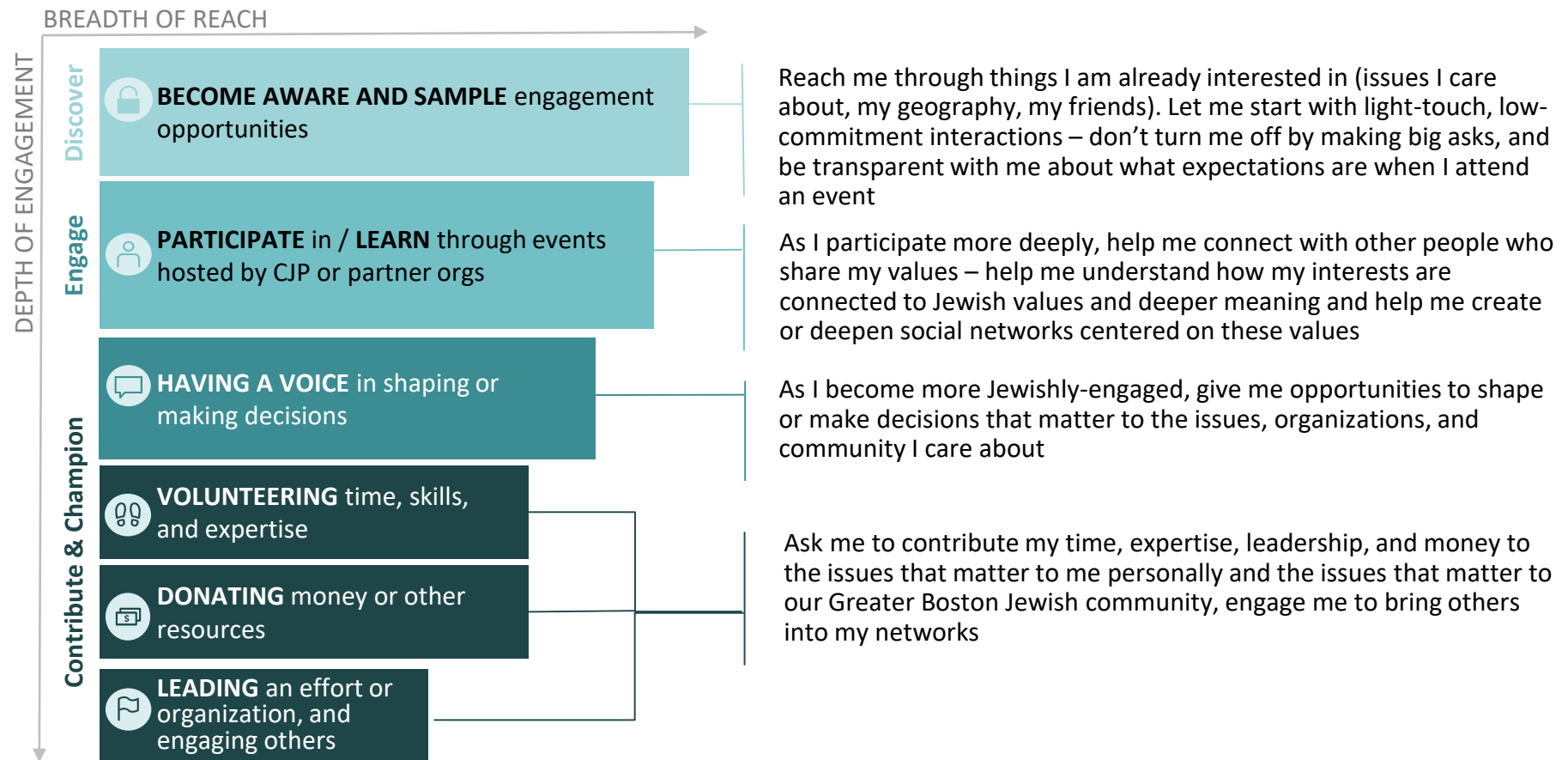
— *additional detail on following pages* —



# Engagement Detail (1 of 3)

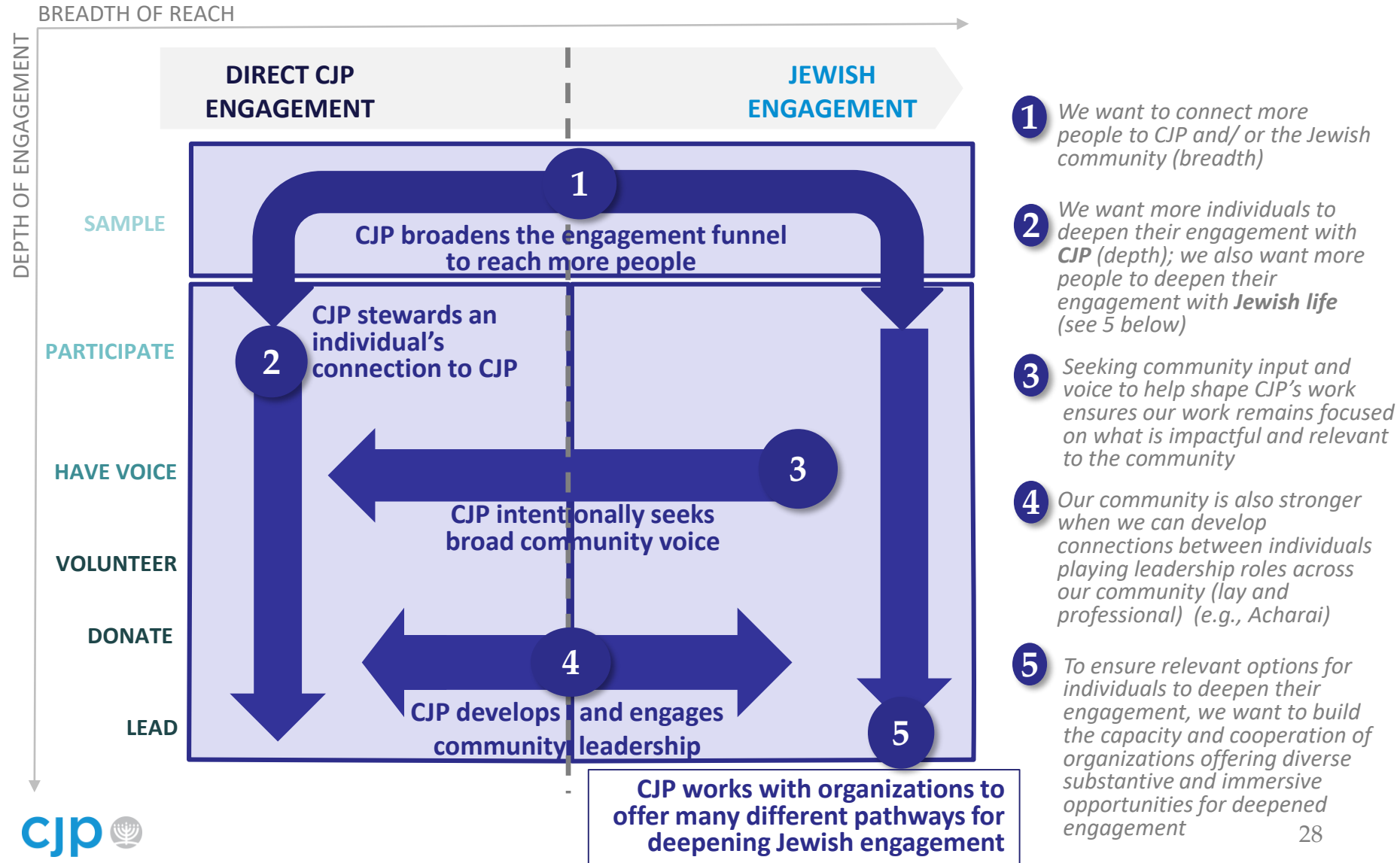


Effective engagement requires that CJP understand where an individual is on their Jewish engagement journey, and, how to engage in ways that will resonate – particularly by connecting individuals to **cohorts of peers**



# Engagement Detail (2 of 3)

CJP supports an individual's engagement with Jewish community, and, an individual's direct engagement with CJP. We do so in 5 distinct ways, as illustrated below:

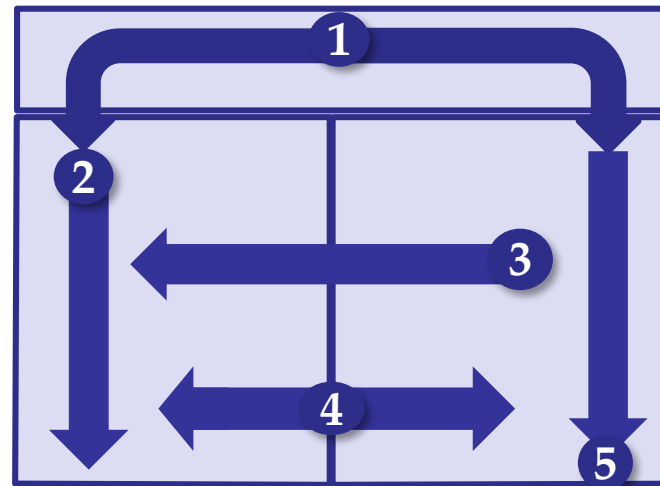


# Engagement Detail (3 of 3)



In each of these areas, CJP has a unique and specific role to play:

- 1 Direct program development in large-scale programs that engage people for the first time in Jewish life or in CJP's work.** We have unique reach across the community to provide compelling programming for diverse populations. We must develop our ability to identify individuals who are interested in more substantive Jewish programming and create cohorts and mechanisms for effective handoff to organizations that provide direct substantive programming **5** and/or identify those who have capacity and inclination to deepen engagement with CJP **2**
- 2 Deepen a donor's engagement with CJP through relationship building and connecting to our impact.** Examples could include missions, skills-based volunteer opportunities, and longer-term investments beyond annual campaign (see **Raising Resources** slides for more detail)
- 3 Create mechanisms to bring more community voices** into CJP's work, including a two-way online portal, more frequent gatherings for community input and reporting, as well as, replacing commissions with new volunteer structures and actively encouraging the involvement of young adults and diverse groups
- 4 Invest in professional and lay leadership development,** including creating cohorts of leaders to align efforts against common community goals
- 5 Enable and support other organizations who provide opportunities for substantive Jewish engagement.** CJP's activities should include transitioning individuals between different engagement activities, supporting information sharing, and addressing key communal-level challenges that no single organization can address alone.



# Engagement: Summary

Broaden and deepen engagement in our work and in the broader Jewish community



## 1 Build stronger mechanisms for broad outreach

- Broaden outreach and opportunities that **appeal to people from diverse backgrounds** to make initial connections to Jewish life and community
- **Build supporting mechanisms** (e.g., data gathering and analysis) that help individuals find additional opportunities to engage with the broad Jewish community and with CJP

## 2 Partner with others to support deep Jewish engagement

- **Support and partner with organizations** that provide effective deeper Jewish learning and engagement – including creating community-wide strategies to address the biggest challenges to deeper participation in Jewish life

## 3 Intentionally seek broad community voice and input

- **Develop new scaled mechanisms for more people across our diverse community to provide input to CJP** (e.g., 2-way communication portals, more frequent community input), in order to:
  1. Strengthen individuals' own Jewish identity and connection
  2. Improve CJP's learning and how we approach our problems
  3. Strengthen CJP's relevance and legitimacy for our communal role

## 4 Adapt CJP's volunteer structures to a new engagement model

- **Change CJP volunteer structures** from commissions to new structures supporting the changing nature of our work (e.g., implement adaptive strategy against stated targets, invest in innovation funds, or seek broad communal input)

# RAISING RESOURCES TO DRIVE IMPACT



## WHY AND HOW PEOPLE GIVE IS CHANGING...

Why and how people choose to support philanthropic causes is changing – both in Greater Boston, and across the country. Donors are increasingly results-focused and data-driven, seeking to feel the impact of their gift, with increasing preferences for directed giving over unrestricted giving to umbrella organizations. Millennial donors in particular approach philanthropy with a more global, social and inclusive outlook.

CJP's donors give because of their confidence in our organization, our proven impact, and their personal connections. For many, giving and involvement are an important expression of Jewish identity and community. Increasingly, donors are looking for greater evidence of impact in their giving. In addition, as we have sought to professionalize our development office, we have not sufficiently focused on building the relationships of donors with one another and to CJP.

CJP's current business model is based on outdated assumptions about how and why people give: it presumes incremental growth of unrestricted annual giving that can support a stable level of allocations to agencies. Our model is increasingly under pressure in light of our community's growing aspirations for impact, as well as the donor trends described above. Despite the overall growth of our annual campaign, driven by designated gifts from a small set of donors, we have seen flat levels of unrestricted gifts, a declining overall number of CJP donors, a declining market share of the philanthropic spend of our wealthiest donors, and less engagement with additional high-capacity donors, particularly those in the next generation. This has necessitated careful management of our operational budget and allocations to agencies.

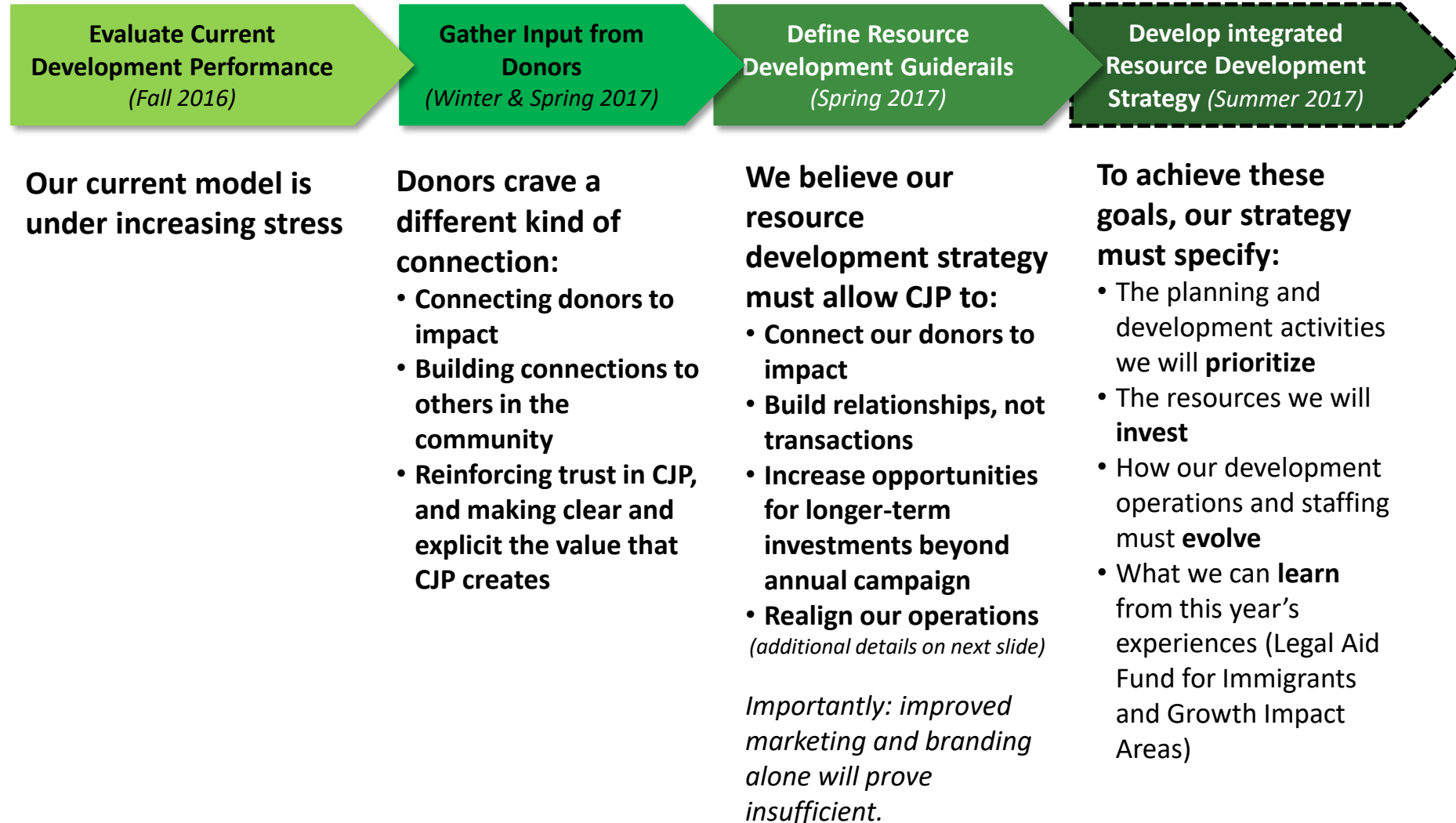
## ...SO WE MUST ENHANCE DONOR CONNECTION

- We must recognize and understand the ways in which our current model is coming under increasing pressure as people's relationship to supporting philanthropic causes evolves to increasingly emphasize directed giving against measurable impact targets
- We must substantially evolve our resource development model and operations to connect donors to our impact, build donor peer relationships, and increase opportunities for longer-term investments in our work
- We must pursue a set of tactics for donor engagement that meaningfully connect donors with CJP and with each other, so that our donors can engage with CJP's work, feel impact, and build community

**— additional detail on following pages —**

# Resource Development: What We are Solving For

Our Resource Development Strategy must address fundamental challenges we see in our current approach







# Resource Development: Summary

Connect donors with each other, with content, and with CJP through longer time horizons

## 1 Connect our donors to our impact

- Communicate more clearly and compellingly the impact & outcomes, and CJP's unique value-add

## 2 Build relationships, not transactions

- Customize our organizational approach for building relationships with more donors
- Infuse more community-building opportunities
- Expand multi-year giving conversations

## 3 Increase opportunities for longer-term investment

- Increase longer-term investments tied to multi-year plans for impact & outcomes (including innovation funds & strategic ventures)
- Increase endowment giving and planned gifts
- Explore strategic partnerships with national foundations

## 4 Re-align our operations

- Shift staffing structure to emphasize relationships among donors cohorts
- Engage volunteers to reach more people and create lasting connections

# Resource Development – From Guiderrails to Tactics

These guiderails suggest tactics for different segments of our donor base:



DONOR SEGMENT	APPROACH	TACTICS
<b>Highest capacity</b> ➤ <b>Next gen*</b>	Invest <b>substantial</b> CJP resources in supporting <b>high-touch professional</b> cultivation and stewardship; expand <b>longer-term investments beyond annual campaign</b>	<ul style="list-style-type: none"> <li> Conversations between family foundation staff / donor and CJP planners to shape specific innovation approaches or strategic ventures of interest</li> <li> Regular interactions with gift officers, including discussion of multi-year, endowment, &amp; planned giving</li> </ul>
<b>High capacity</b> ➤ <b>Next gen*</b>	Invest <b>substantial</b> CJP resources in a <b>hybrid</b> of professional & volunteer relationship-building; expand <b>longer-term investments beyond annual campaign</b> , with intentional focus on the next generation	<ul style="list-style-type: none"> <li> Build networks through missions &amp; intimate peer gatherings</li> <li> Invitations to CJP events where CJP shares impact and progress updates</li> <li> Regular interactions with gift officers, including discussion of multi-year, endowment, &amp; planned giving</li> <li> Use of volunteers in donor outreach and new donor acquisition</li> </ul>
<b>Moderate capacity</b>	Invest <b>moderate</b> level of CJP resources in a <b>hybrid</b> of professional & volunteer relationship building, with an intentional focus on the next generation	<ul style="list-style-type: none"> <li> Invitations to CJP events where CJP shares impact and progress updates</li> <li> Use of volunteers in donor outreach and new donor acquisition</li> </ul>
<b>Lower capacity</b>	Invest a <b>limited</b> amount of CJP resources in <b>scaled</b> outreach supported by volunteers and technology	<ul style="list-style-type: none"> <li> Invitations to CJP community events where CJP shares impact and progress updates</li> <li> Use of <b>digital</b> media to share impact stories, and, to offer alternate forms of engagement (beyond donation)</li> </ul>

\*Next gen = donors under age 45 who have potential to be future high-capacity and highest-capacity donors, even if they do not have that capacity today

**What's Next**

# What Comes Next

Although the preceding content represents a strategic direction and framework for CJP, further work will be required within these principles to define detailed strategies for impact areas, engagement, and resources, to wrestle with resource tradeoffs, and develop pilots to test our ideas

## 1 WORDSMITH VISION & MISSION LANGUAGE

Draft language into final form

## 2 DEFINE SPECIFIC IMPACT STRATEGIES & TACTICS

- Charter volunteer group to define CJP structure and role in driving **innovation** across the community
- Task CSP with refining definition of **Kehilla** and our funding mechanisms/ approach for organizational review, capacity development and partnership
- Redefine planning volunteer structures in this transitional year to refine **strategies for each impact area**
- Determine which strategic ventures and innovation funds we are pursuing in the medium term

## 3 DEFINE ENGAGEMENT STRATEGIES & TACTICS

Charter a task force to:

- Set **engagement priorities, strategies & tactics**
- Plan how we implement new engagement tactics, including broader community input and involvement

## 4 DEFINE DEVELOPMENT STRATEGIES

Task CJP professionals and Committee on Development with:

- Creating **implementation plans** for resource development strategies in line with the guiderails articulated in the strategic plan

## 5 OPERATIONAL CHANGES

Task CJP Management with:

- **Shifting resources to support strategic plan priorities** – and determining what to deprioritize or sunset
- **Streamlining CJP operations** for greater efficiency and impact against strategic plan
- **Revisiting** how operating costs are covered through **overhead on designated gifts**
- Develop CJP **Balanced Scorecard** for reporting on strategic implementation and impact
- Make immediate investment in **measurement / evaluation**

# The Path Forward: A Multi-Year Roadmap

The strategic shifts indicated in this plan will take multiple years to fully implement, beginning with building foundations for the future and followed by targeted investments to position CJP for long-term impact in our community

FY2018

*Building foundations for the future*

This will be a year of building the internal foundations and scaffolding that will allow CJP to shift to new modes of operating:

- **Further refining programmatic approaches within our five impact areas** to reach our outcome goals – including **greater clarity on community (*kehilla*) investments**
- Internal development and initial implementation of **new approaches to engagement and resource development**, particularly with most critical stakeholders
- **Investments to build CJP's capabilities in measurement & evaluation, communication & engagement, and resource development** (*see next slide for additional detail*)
- During the year, we expect to have identified the specific problems we will focus on in FY19

FY2019

*Making targeted investments*

FY19 will be a year of targeted philanthropic investments in the most promising ideas developed in FY18:

- **Raise and launch 1 large-scale strategic venture** that scales solutions in an impact area to be determined in FY18
- **Launch 1-2 additional smaller-scale innovation initiatives**, in areas to be determined in FY18
- **Realign community (*kehilla*) investments** in line with approaches defined in FY18
- Clear **measurement and evaluation** approaches underpinning the above
- **Expanded implementation of new engagement and resource development approaches** (including of medium-priority stakeholder groups)

We expect at this point to have successfully navigated CJP's transition to new leadership following Barry's retirement. We also expect to see our FY18 investments in engagement translate into increases in our database of stakeholders.

FY2020 and beyond

*Making long-term impact*

What FY2020 will look like will depend in large part on CJP's leadership transition, but assuming continued support of the strategic priorities defined in FY17-FY18, we intend to come out of the transition engaging a broader network of people and partner organizations in advancing our five impact areas across our community, and, with CJP having the capacity, structure, and refreshed business model to support the Greater Boston Jewish community.

We expect at this point to have increased growth in CJP's impact and the resources we raise as a result of investments made in FY18 and FY19.

# FY18 Investments

To support CJP's strategic shifts, we plan to make the following investments in improving high-priority organizational capabilities

## Investment

## Why

## What and How



**Measurement & evaluation expertise**

To bolster CJP's ability to evaluate our overall impact and our progress against specific outcomes and targets, by helping define appropriate measures and measurement techniques and guiding continuous improvement of internal practices and processes

Add 1 FTE with, or contract for ongoing access to, M&E expertise



**Customized outgoing communications**

To address a critical bottleneck that currently prevents CJP from customizing communications to subsets of our community

Invest in further improvements to our communication / IT systems



**Community platform for dialogue & input**

To create an effective, user-centered platform for engaging our broad community for input on important community issues

Conduct research to define and design a platform structure that resonates, and implement



**Expand young adult engagement strategies both broadly and in CJP**

To pilot and build processes and mechanisms for young adult engagement that create new entry points and locally-based content.

To invest in a long-term fundraising strategy for the next generation of CJP donors and leadership

Invest in a design-thinking process in Cambridge/Somerville; Explore information-sharing structures with partner organizations; Launch new entry points and engagement efforts



**Missions**

To build deeper donor connections to peers and to CJP's impact, particularly with next-gen population

Run 2-3 missions explicitly design to engage next-gen



**Celebrating Barry**

To build deeper donor connections to peers and to CJP's impact through celebration of Barry's impact at CJP, Boston and around the country

Invest in celebratory events and associated fundraising

# Appendix Materials



# Appendix Contents

<b>Summary: What We have Learned &amp; What We Recommend</b>	<b>41</b>
<b>The Case for Change</b>	<b>44</b>
<b>Framing Thoughts on Justice (<i>Tzedek</i>)</b>	<b>49</b>

# What We've Learned: A Summary of Key Themes

*From May 10<sup>th</sup> Board Retreat*

1

## REAFFIRM OUR ENDURING VISION, REFINER OUR MISSION

Our community strongly supports a **broader vision of vibrant Jewish life**. In addition to our current mission areas of **caring, learning, and Israel**, our community cares deeply about issues of ***tzedek* (social justice)**, and about strategically investing in the **community's** connections, capacity and resiliency.

VISION  
& ROLE

The Greater  
Boston  
Jewish  
Community

IMPACT  
& GOALS

2

## FOCUS ON IMPACT

CJP is most effective when we integrate a **clear vision with strategies against outcomes**. We must be clear on **our role** and **how we uniquely create that impact**. CJP must consistently target, hold itself accountable to, and communicate against, **explicit and measurable outcomes**; develop and evolve strategies to maximize those outcomes; and make investments focused on and limited to achieving those outcomes. While there is a wide range of pressing areas, engaging future generations in Jewish life is the highest priority.

## DRIVE NEW ENGAGEMENT APPROACHES

3

People are seeking connection and community. **Traditional models** for engagement need to be paired with **new approaches** to be effective across our diverse community, in particular with young adults. Many are looking to get involved with CJP in ways beyond donating money. **We must find new ways to broaden and strengthen engagement in the Jewish community and with CJP.**

ENGAGEMENT

RESOURCES

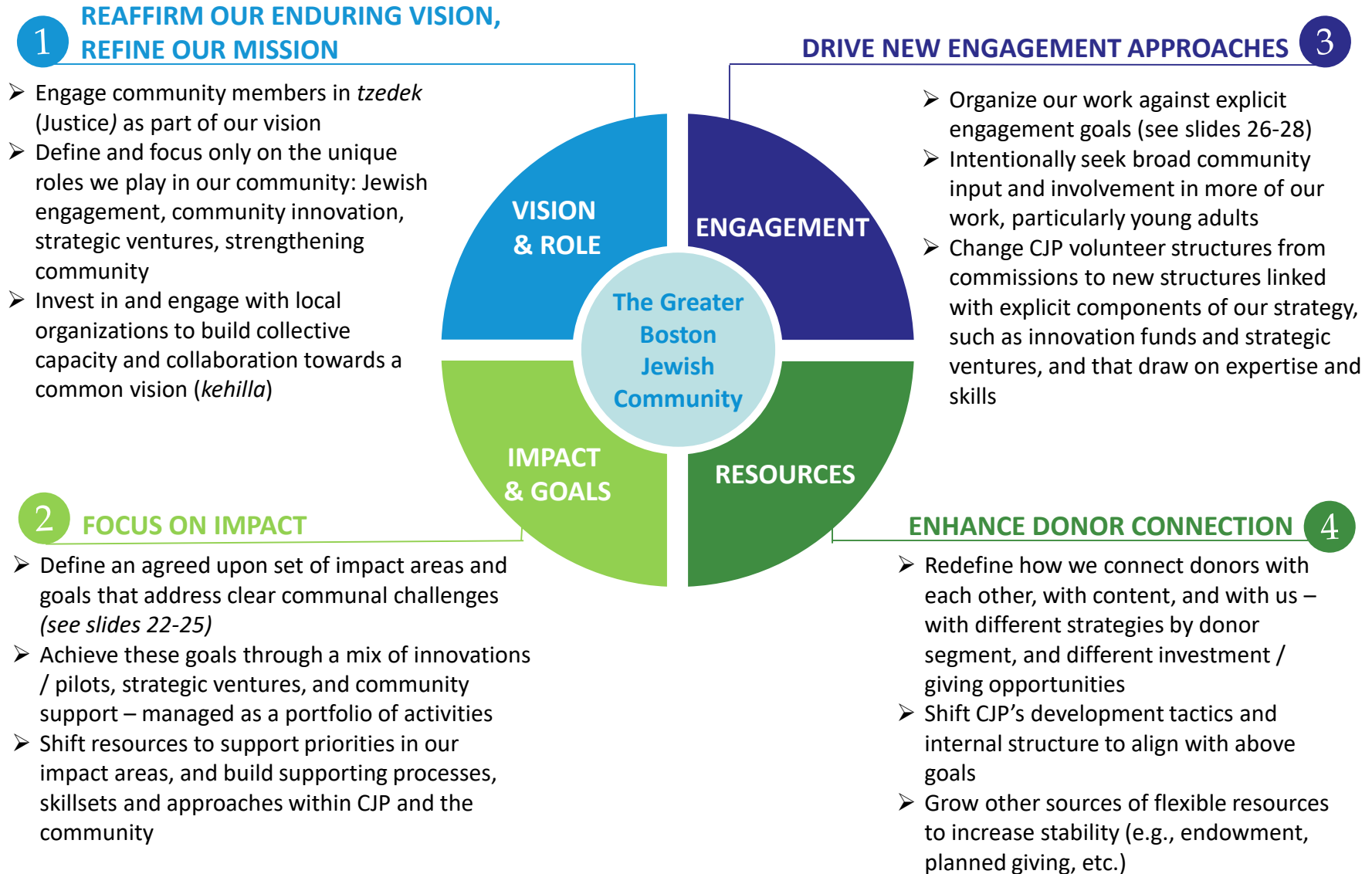
## ENHANCE DONOR CONNECTION

4

Donors want to engage with CJP's work, feel **impact, and build community**. Many want touchpoints beyond solicitations. To achieve our vision and goals, CJP must re-ignite its fundraising by developing **new ways to connect donors with CJP and with each other**, and to make CJP count among the places for which our donors feel the most passion.

# What We Recommend: A Summary

## From May 10<sup>th</sup> Board Retreat



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# CJP has tremendous strengths to build upon, but, we must adapt in response to a changing world

## CJP STRENGTHS



One of the most successful federations in the country



Ability to change with, and lead change in our community



Ability to bring together people, partners, and resources in common purpose



Significant increase in dollars from designated giving



Experience in elevating the role of Jewish learning and living



Relevance to the Greater Boston Jewish community



Ability to tackle complex issues in scaled ways that no one else can

## TRENDS RESHAPING OUR COMMUNITY



### DEMOGRAPHICS

Different geographies (urban)

Increasingly diverse with distinct ways to connect with Jewish life

Millennial and beyond growing up in distinct context (e.g., 47% are children of interfaith parents)



### ENGAGEMENT

Changing patterns of affiliation (denominations & institutions)

More fluid and varied engagement

Increasing spirituality and universalism

Increased integration of technology



### ISRAEL

Birthright – 74% young adults have travelled to Israel

Polarizing topic; increasingly partisan

Many millennials are “Israel Conflicted”



### PHILANTHROPY

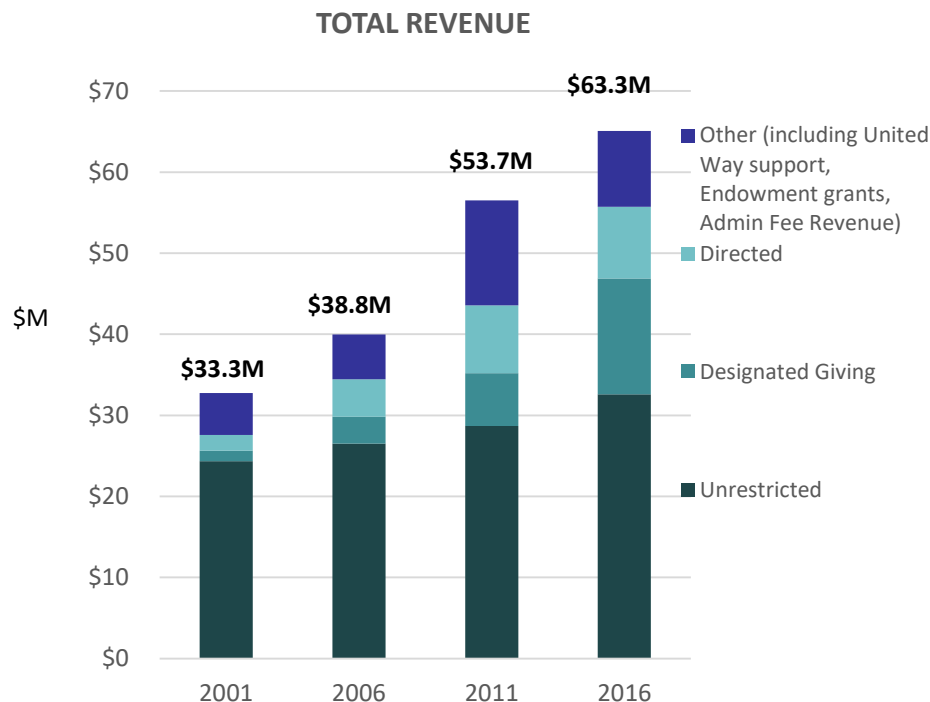
Concentration of donor base

Increasing donor desire for direct connection, impact & outcomes, and global & inclusive issues

Flat levels of unrestricted donations to CJP and declining number of CJP donors reflects these larger philanthropic trends

## We have had a very successful twenty years in campaign and revenue growth, supporting and enabling the work we do for our community

- CJP's campaign has grown steadily over the past 20 years, especially the past 15 fifteen years, fueled primarily by growth in designated giving
- We are by far the fastest growing large city Federation in North America with a 5-year compound annual growth rate (CAGR) of 5% -- more than double the next fastest growing federation -- while many other federations have seen their available resources flatten or decline
- Coupled with other revenue resources, the result has been significantly increased available resources overall and increased resources available for our most critical priorities



### Annual campaign overall

Unrestricted

Designated Gifts

Directed

Endowment grants to Resource Allocation- Unrestricted

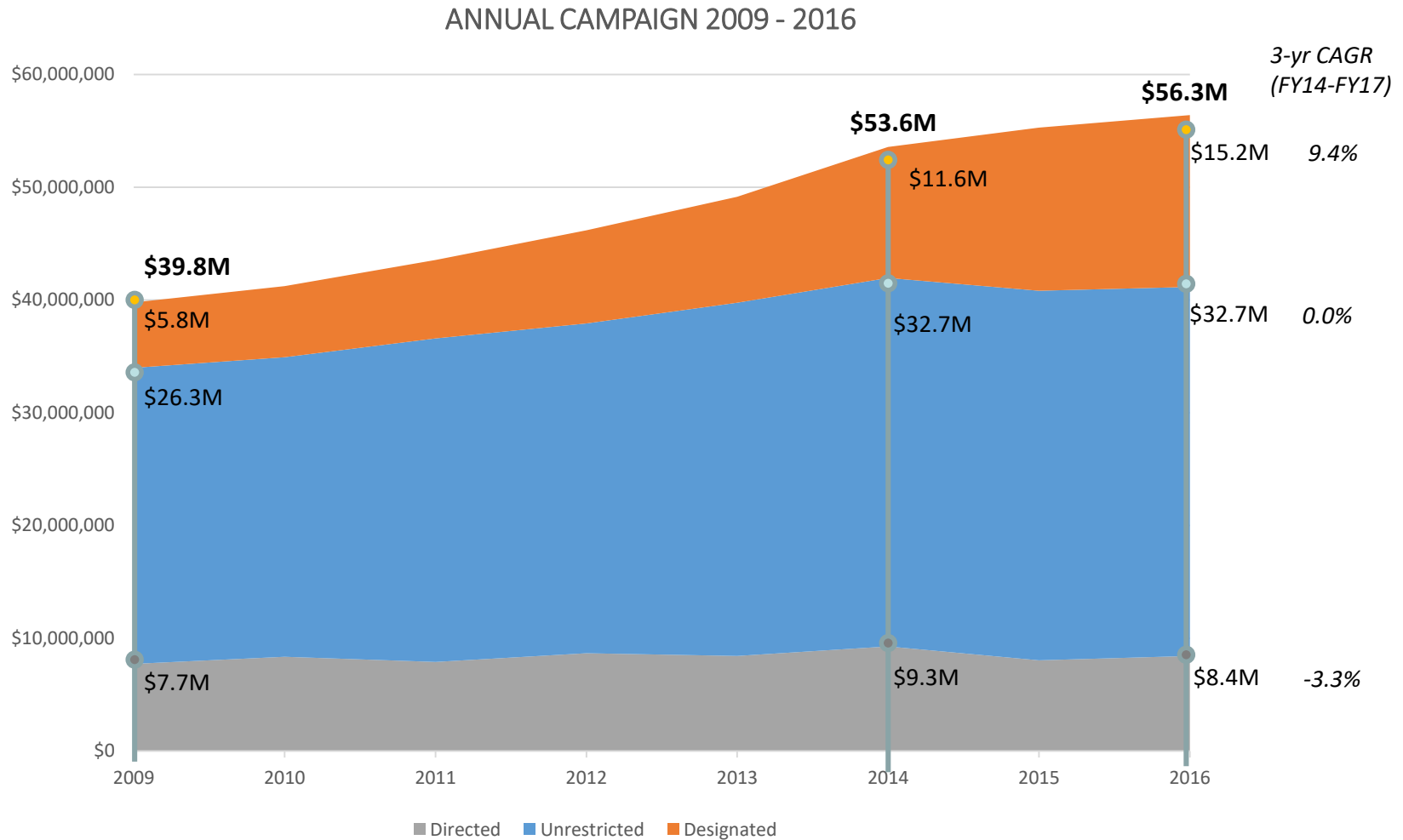
Endowment grants to Resource Allocation -Other

Admin Fee Revenue

**UR Resources (ex. Stabilization)**

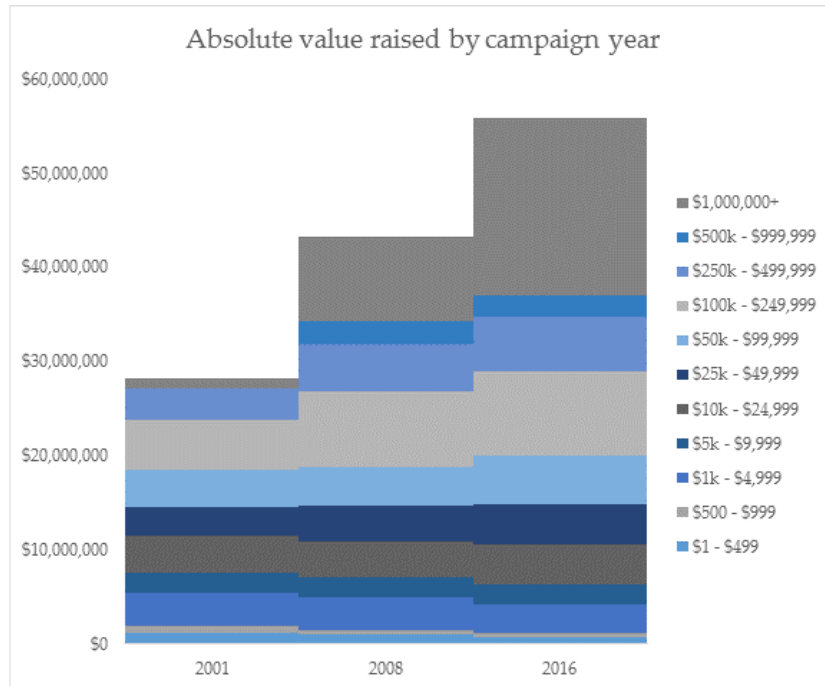
	CAGR	ABSOLUTE
	5-yr	5-yr
Annual campaign overall	5.0%	27.9%
Unrestricted	2.6%	13.6%
Designated Gifts	17.1%	119.8%
Directed	1.1%	5.7%
Endowment grants to Resource Allocation- Unrestricted	7.5%	43.6%
Endowment grants to Resource Allocation -Other	8.4%	50.0%
Admin Fee Revenue	-6.9%	-30.0%
<b>UR Resources (ex. Stabilization)</b>	2.2%	11.2%

Yet...even with all of these successes, we are beginning to face increasing pressures: unrestricted dollars have remained flat for several years, creating challenges in absorbing operational costs and driving cuts to allocations and operations that rely on unrestricted resources

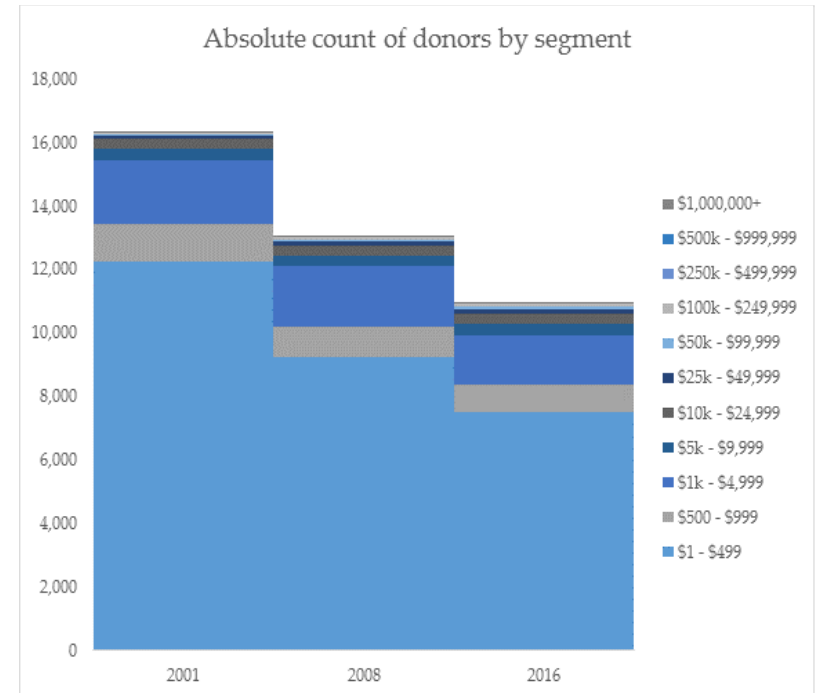




## Growth in campaign revenue has been driven by effective engagement of our largest donors; yet like other federations, we see increasing concentration of our donor base as the overall number of donors has declined



- We have experienced increased revenue at all \$5K+ segments, with the most dramatic increase among \$1M+ donors (going from 1 to 12 donors in this category)
- We also see significant strength in the \$10k+ segments, especially \$100k+



- We have about 5,000 fewer donors in 2016 than 2001; at the same time we have increased the number of donors at the \$5K+ level
- The increasing concentration of donors increases the level of risk for CJP: the impact of a single donor's decision to give (or not) can have outsized impact – and the declining number of smaller-dollar donors raises questions about CJP's relevancy

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# Framing Thoughts on Justice (*Tzedek*) (1 of 2)

As we make more explicit CJP's work on Justice (*tzedek*), the Board has indicated a desire for greater clarity on how CJP would approach this topic on key questions:

## WHY MAKE OUR WORK ON JUSTICE MORE EXPLICIT IN OUR VISION?

- **Justice (*Tzedek*) has always been a central value for our community:** "Communities of Justice" was a core part of the 1997 CJP strategic plan
- **This strategic planning process has highlighted significant interest from our community in elevating this work:** "Speaking out for social justice" was rated an important role for CJP to play in our 2017 community poll as an important role
- **We are already supporting justice work that we are not known for in the community** (primarily through support to JCRC and our human service agencies, and inclusion work for people with disabilities)

## WHAT CONCERNS DOES THIS RAISE?

- Our society in 2017 is more politicized than before – **how can we do this work more explicitly yet avoid having our work be seen through a political lens**, which may negatively affect other aspects of CJP's work?
- Our community may have strongly divergent perspectives on specific social justice issues. **How will we navigate competing perspectives** in ways that are authentic to our community and to our Jewish values?
- **Our compassion & caring work** serves the disadvantaged in our community; **our justice work** looks beyond to broader society. **When do we distinguish between these approaches, and when do we integrate them?**

## WHAT WORK ARE WE ALREADY DOING?

- CJP's support of JCRC is wide reaching, supporting social justice work for teens (telem), advocacy for our social service partner agencies and vulnerable populations and other government affairs advocacy, literacy programs for inner city schools (gbjcl) and unrestricted support. Annually, we support JCRC through an annual allocation of \$1.7M
- CJP also supports human service agencies who serve populations beyond the Boston Jewish community (such as JVS and JFCS)
- CJP's Legal Aid Fund for Immigrants (CLAFI) has been a successful model for CJP to support raising funds to support a social justice cause of meaning to our community, in partnership with other community institutions (Catholic Charities) and has raised \$0.6M to date
- For over a decade, CJP has been committed to creating a more inclusive Jewish community, and advocating for changes in wider society that would yield a more inclusive broader community for people with disabilities. Our TTW program is one example.



# Framing Thoughts on Justice (*Tzedek*) (2 of 2)

Our initial thoughts on how we would expand our Justice work are captured below – we aim to enlist a task force in coming months to further deepen and shape this thinking.

## WHAT MIGHT SUCCESS LOOK LIKE?

**How can we provide opportunities for effective action as Jews to collectively build a more just and peaceful world?**

There is a deep yearning for more opportunities for effective action as Jews in community to collectively build a more just and peaceful world.

We aspire to broaden opportunities to bring a Jewish perspective in coalition with partners to tackle our society's most pressing issues.

One indicator of success would be an *increasing % of people who take action on issues they are passionate about as an expression of their Jewish values and identity*

## WHERE MIGHT WE FOCUS?

Initial discussion with volunteers and professionals suggests CJP might focus on:

- **Framing our Justice work as our responsibility to address issues in broader society (beyond the Boston Jewish community)** – and distinguishing this from our Caring & Compassion work that is focused on the needs of the Boston Jewish community
- **Partnering with other organizations as implementation partners** (e.g., national Jewish organizations or local non-Jewish organizations)
- A flexible approach to selecting issues, that allows CJP to **rapidly respond to emergent needs** and interests (as with CLAFI)
- A thematic approach to selecting issues, that allows for **integration of Justice issues with other aspects of CJP's work** (e.g., Learning, Israel)

## WHAT APPROACHES MIGHT WE CONSIDER?

An initial (not exhaustive) list of potential approaches under consideration\* includes:

- **Deepening our partnership with JCRC** – e.g. by connecting interested donors and volunteers to JCRC work supporting the broader community
- **Creating a specific fund focused on serving the caring needs of the local Boston community** – e.g., addressing mental health and housing for the Boston community, which would also benefit the Boston Jewish community, in partnership with non-Jewish organizations
- **Mobilizing the Jewish community to “give & volunteer Jewishly” to non-Jewish causes**– e.g., creating giving circles for low dollar donors to learn about social justice issues or creating a robust volunteering platform that supports a community goal of X hours volunteered

*\*the Justice (tzedek) task force would further develop this thinking, assess pros & cons, etc.*