

Greensboro Jewish Federation Mission Statement (3/23/2018)

The Greensboro Jewish Federation builds community among the Jewish people of Greensboro, assuring continuity from generation to generation. Recognizing that each Jew is responsible, one for another, the Federation promotes the welfare of the Jewish people in our community, in Israel and worldwide.

The Federation accomplishes its mission by:

- *Developing Jewish educational and cultural activities.*
- *Promoting an understanding of Jewish culture and concerns.*
- *Fostering cooperation and effectiveness of existing Jewish organizations.*
- *Developing human and financial resources to meet Jewish needs.*
- *Building a strong relationship with our community-at-large.*

Strategic Planning Process 2017-2018*

In the fall of 2017 the Greensboro Jewish Federation embarked on a process to ensure that our Federation and our community will be a place where Jewish life thrives in all its various forms and religious practices well into the future. We recognize we are a diverse group and the Federation strives to be a place where all Jews find their niche. These Strategic Opportunities were developed by a Strategic Planning Task Force in consultation with our consultants, the Belenky Group. The Task Force was intentionally representative of the diverse demographics and opinions in our community. The result of that work is based on past documentation of former strategic plans, over 30 stakeholder interviews and the work of the Task Force to envision our thriving community for many years to come. The Task Force identified 6 strategic opportunities and created goals and timelines to operationalize these opportunities, realizing that we live in a changing world. This document will be a roadmap for work plans for staff, volunteers and board members acknowledging tactics may change along the way, to achieve the goals set out which align with our mission and our vision for our future. *see addendum for working notes from pre-Board discussions (3/21-22/2018)

Sue Simmons, Chair, Strategic Planning Task Force,
Marc Isaacson, President,
Marilyn Forman Chandler, Executive Director

Greensboro Jewish Federation Vision Statement 2018

*Our vision for Greensboro:
A community where YOUR Jewish life can thrive*

Strategic Opportunity #1

Financial Stability: Increase the Federation's total financial resources* to support the Jewish communities of Greensboro, Israel and the world

- Determine the benefit and risk of having a directed giving policy
- Evaluate benefits of best practices and if appropriate, implement additional donor friendly giving options
- Identify opportunities
 - Enhance the day to day collaboration between the Federation and Foundation
 - Align the campaign to overall resource development
 - Increase support of resource development volunteers
 - Grow the Federation's financial resources
- Collaborate as senior staff leaders to design new models of giving for presentation to the board, to create an integrated total resource development strategy

What does success feel like?

- 90 days following adoption of the strategic opportunities and goals, a policy is determined regarding directed giving and constituents/stakeholders made aware via all marketing channels.
- Campaign is streamlined and managed primarily by staff to encourage volunteers to Chair and work on the campaign
- Total resources (annual campaign + endowment) are grown annually through increased Federation and Foundation collaboration and information sharing.

GOAL #1 - Federation and Foundation share responsibility for growing endowments, donor advised funds, Federation endowment, and annual campaign so that total resources to Federation (Federation endowments plus campaign) continue to grow beginning with the 2019 Annual Campaign.

GOAL #2 – Align staffing at the Federation to accomplish goal #1, beginning with the 2020 Annual Campaign.

Point persons: =GJF Executive Director, JFG Director, GJF Board Past President, GJF Director of Finance & HR

*campaign+permanent endowment payouts+other contributions + grants

Strategic Opportunity #2

Market Alignment: Establish the Federation's identity as a comprehensive entry point and pathway for Jewish Community life in Greensboro

- Define and create a consistent message about what it means to be the community convener around Jewish life
- Attract the disengaged and marginally-affiliated Jews in the Greensboro community
- Develop inclusive messaging to brand the Federation as welcoming to all Jews
- Community concierge/onboarding/tracking/protocols
- Participate in existing resources (e.g. Entrepreneur Navigator tools, Nussbaum Center) to connect people to jobs in the community
- Be a value-added organization for companies that want to use us - create value so people come to us; help companies recruit.

What does Success feel like?

- Many cross-organization functions taking place with or without Federation involvement, but with Federation's help to convene groups for the benefit of the community
- Clear roles for leadership round table and other like committees/organizations
- Federation is clearly a point of entry for the entire community via concierge and referral services online or in person

GOAL #1 - Work with Leadership Roundtable to engage their organizations/institutions in creating a plan to support community concierge services as an entry point to the Greensboro Jewish Community. Provide a menu of services and incentives for new members to the community from all organizations.

Point Person – GJF Executive Director

GOAL #2 Implement a marketing strategy to promote the Greensboro Jewish Community and to create a consistent message about what it means for the Federation to be the community convener around Jewish life in Greensboro.

Point Person – Communications and Corporate Partnership Coordinator and Marketing Committee

GOAL #3 - Revisit Gesher Greensboro to address connecting with existing resources (see above) in order to become a value-added organization for businesses in Greensboro.

Point Person: GJF Executive Director, Communications and Corporate Partnership Coordinator and Gesher Committee

Strategic Opportunity #3

Succession Planning: Attract and develop the Federation’s next generation of volunteer leadership and professional leadership

Volunteer Leadership:

- Expand personal growth and leadership skills programs, adding a minimum of two initiatives to:
 - Increase access to leadership and other decision-making opportunities across generational groups
 Create a diverse pipeline of potential leader

GOAL #1 - Continue and grow the GFLI (Greensboro Federation Leadership Institute) program and build on its success.

Point Person - Outreach and Engagement Coordinator

Professional Leadership:

- Create a succession plan to prepare the Federation, JFS and JFG for the eventual departure of Executive Director Marilyn Chandler, as well as JFS Director Betsy Gamburg and JFG Director Susan Gutterman
 - Identify the required strengths of each position and the required individuals and activities to transfer key relationships.
 - Document and/or update critical processes and other relevant data to avoid loss of critical institutional memory.

- Develop adequate financial resources to groom the next generation of professional leaders.

GOAL #2 - Develop a professional development program for all levels and have a process to develop and retain qualified candidates for senior leadership positions

Point Person - GJF Exec Director, Director of Finance, HR Chair

Goal #3 – Inventory and document core Federation functions, processes and stakeholder relationships.

- Create an operational plan including cross training of staff.

What does success look like? Implement a process to develop and retain qualified candidates for senior volunteer and professional leadership positions. A strong professional development program exists for all levels in the organization. High potentials are identified. Essential processes are documented.

Point Person - GJF Executive Director, GJF Board Chair, GJF HR Chair

Strategic Opportunity #4

Pace of Change: Improve the Federation’s adaptability and responsiveness

- Explore how GJF Board and Executive Committee current decision-making process supports or hinders staff execution and adapt for increased efficiency and effectiveness
- Measure number of people being reached by communication channels (email, newsletters, social media channels, Shalom Greensboro etc.) and establish goals to increase connection
- Modify communication methods to appeal to the various demographics of stakeholders, including the greater Greensboro community

What does success feel like?

- Community gives feedback acknowledging decisions more quickly made. More people engaged in programs due to more effective communication. Stakeholder represent a wide variety of demographics in our community

GOAL #1- Create and implement a new communications plan with a variety of virtual and hard copy channels reaching a broader demographic of stakeholders in Greensboro beginning in September of 2018. Measurably increase stakeholder engagement via these channels.

Point Person - Communications and Corporate Partnership Coordinator - Marketing Committee

GOAL #2 - Review Federation Executive Committee and board engagement to make decision making process more seamless and engage more board members in activities outside of board meetings. Evaluate effectiveness and structure of executive committee and board. Have a process in place to make decisions about Federation's public responses to current issues.

- Distinguish between political/legislative and moral/humanitarian issues.
- What is the vetting process for coming out with a statement? How does this dovetail into being a convening organization?

Point Person - GJF Executive Director, GJF Board President, GJF President Elect, GJF Past President

Strategic Opportunity #5

Inclusive Environment: Adapt and enhance Jewish programs, services and involvement opportunities to support the rapidly changing demands of the local community

- Identify gaps by using data collection techniques such as industry research, surveys, interviews and focus groups to gain a more complete and accurate understanding of Jewish community needs
- Coordinate a community-wide effort to encourage Jewish engagement
 - Conduct consistent research, data collection and discussion to find gaps in programming and services.
 - Collaborating with Jewish agencies to establish new activities that address gaps
 - Increase the number of youth involved in Jewish experiences (trips to Israel, camps etc.)
- Create a minimum of two new forums to share ideas and understand the increasingly diverse perspective and opinions on local Jewish life and Israel.
- All appropriate Federation activities will demonstrate how they tangibly address the changing demographics.

What does success feel like? Increased numbers of affiliated and unaffiliated Jews are identified and engaged. in some Jewish programming in Greensboro.

GOAL #1 – Identify individuals across age groups involved in Jewish activities and define gaps in engagement and programming.

Point Person - Engagement and Outreach Coordinator, JFS Director

Goal #2 - Provide opportunities to different age groups for engagement at life transition points e.g.: birth, teens, singles, recent college graduates, millennials, families with children at home/with new babies, newly married, newly divorced, interfaith families, newcomers, empty-nesters, retirees, unaffiliated, elders

Strategic Opportunity #6

Community Leadership: Foster greater collaboration and partnership with Greater Greensboro community agencies and organizations

- Identify Greensboro's influencers and recruiters and explore opportunities for engagement
- In partnership with other Jewish organizations, implement new community building activities
- Partner with Greensboro community organizations who are working on issues relevant to the well-being of the entire community. (e.g. interfaith study mission, food task force, interfaith clergy mission, local experts at affinity group meetings)

What does success feel like?

- Federation is engaged significantly in Greensboro community efforts
- Greater Greensboro Community organizations see Federation as a resource to accomplish shared goals.
- Greater Greensboro community integrated into our work and our work is seamlessly integrated into the Greater Greensboro Community

GOAL #1 - To engage greater numbers of the Jewish community in general community nonprofit and civic organizations and boards.

GOAL #2 - Review current engagements with Greater Greensboro Community organizations and define other opportunities.

Point Person - JFS Director, JFS Volunteer Coordinator

ADDENDUM

An integrated realistic master time line extending 3-4 years will be developed with volunteer and professional leadership given already existing programs, services, volunteer and staff availability/requirements for additional staff. We will create “SMART” aggressive goals.

This document is fluid and will change as we proceed forward

Regular reporting with progress will be shared with the BOT and Staff.

These notes to the Strategic Plan are a collation of discussion notes and written notes from meetings, written correspondence, phone conversations, etc. leading up to the presentation at the March 27, 2018 GJF Board of Trustees.

Special thanks to these individuals for their comments prior to the BOT meeting:

Michael Berkelhammer, Andrew Bowen, Donna Cohen, John Cohen, Tom Cone, Scott Feldman, Betsy Gamburg, Susan Gutterman, Rabbi Fred Guttman, Arlene Henza, Jenny Kaiser, Gail LeBauer, Paul Lieb, Andrew Mbuvi, Victoria Milstein, Erica Procton, Keith Rosen, David Rosenstein, Judi Rossabi, Dana Schleien, Steve Shavitz, Joyce Shuman, Susan Siegel, Raffi Simel, Aaron Strasser, Tom Sloan, Tammi Thurm, Ginny Villani.

Special thanks to the Strategic Planning Task Force: Sue Simmons, chair Rebecca Ben-Gideon, Sam Cone, Corie Hampton, Marc Isaacson, Jenny Kaiser, Arthur Samet, Keith Rosen, Marilyn Chandler, Susan Gutterman, Emily Gray, Betsy Gamburg, Michele Perrell

Special thanks to the Strategic Planning Advisory Committee: Sue Simmons, John Cohen, Marc Isaacson, Randall Kaplan, Cathy Levinson, Keith Rosen, Marilyn Chandler

Special thanks to the stakeholders who participated in interviews: Rabbi Joshua Ben-Gideon, Mike Berkelhammer, Andrew Bowen, Frank Brenner, John Cohen, Donna Cohen, Irene Cohen, Sam Cone, Tom Cone, Amanda Fonorow, Betsy Gamburg, Susan Gutterman, Rabbi Fred Gutman, Corie Hampton, Erica Herman, Marc Isaacson, Jenny Kaiser, Randall Kaplan, Cathy Levinson, Kathy Manning, Victoria Milstein, Michele Perrell, Rabbi Yosef Plotkin, Erica Procton, Keith Rosen, Brian Ross, Alyssa Samet, Vivian Sheidler, Joyce Shuman, Susan Siegel, Raffi Simel, Tom Sloan, Alina Spaulding, Aaron Strasser, Tammi Thurm.

Special thanks to Belenky Consulting: Stephen Belenky, Neil Belenky, Erica Madden

Provide a supplemental page with photos of staff members involved in this process.

STRATEGIC OPPORTUNITY #1: FINANCIAL STABILITY

- “Long term financial stability” and/or “Increased Fundraising” focused on increasing the campaign and growing Perpetual Annual Campaign (PACE) endowments for the Federation (especially to take pressure off of raising annual campaign dollars for G & A). Should include Create A Jewish Legacy.
 - Matching Gifts
 - Enhance and organize staff resources with volunteers with regard to the campaign.
 - Actual metrics should be applied such as record of issues and resolutions and decreasing the number of any issues each month; tracking hours spent working on the campaign
 - Sensitivity about walls of confidentiality, changing demographics and changes in generational wealth.
 - Do we have the right people in the right seats with the right skills? Need for re-alignment?
 - Prioritize needs given limited financial and people resources; There are endless needs.
 - What are the priorities of the campaign? local vs. overseas. Should we once again look at institutionalizing a fixed % for each area of focus? Shouldn't the Federation's campaign reflect communal priorities?
 - We continue to pull from the largest number which is inevitably overseas. This is a reactive vs proactive/planned decision that occurs annual during the allocations process
 - Directed giving/Supplemental Giving/Designated Giving vs. Pass-Through Giving - above and beyond the annual campaign; what is relevant for the Foundation and for Federation?
 - Focus on greater impact
 - We earn the support of Federation members each and every day
 - Focus on long term priorities
1. I'm glad we are creating a strategic plan
 2. Is it fair to say that Opportunity 1 is based on the fact that the Foundation has been very successful at growing but the Federation's campaign has not? If so, maybe this isn't a communication or staffing alignment issue, but rather speaks to the need for Federation to create more value in the community. I guess what I'm saying is that maybe Opportunity 1 shouldn't be the top priority. Perhaps larger donations would come from demonstrable success on things like Opportunity 2, 5 and 6.
 3. I think that Opportunity 2 should really be number 1. Also, I'm not sure that Opportunity 6 isn't really part of #2. In any case, a goal of something to happen in the next 21-33 months (by 2020) on this is too distant.

STRATEGIC OPPORTUNITY #2: MARKET ALIGNMENT

- Work on building trust and a team effort between all Jewish communal organizations; we are much stronger together.
- We should be working on partnering with all Greensboro Jewish communal organizations. It is NOT about who owns whom or who owns which age group within the community. We are all providing a service to the community. We are all point guards passing the ball to one another.
- Marketing materials for Geshar Outreach need to be developed
- Care packages delivered to newcomers on behalf of the entire community; welcome groups

- Best practices from other communities

STRATEGIC OPPORTUNITY #3: SUCCESSION PLANNING

- This is critical to the sustainability of the organization. Define a strategy: interim? Bring in a strong #2?
- Potential for a “trifecta” need for succession; do we groom from within or bring in professionals from outside the community? There is substantial investment/potential high long term cost; do we have adequate resources?
- Create a pipeline of millennial engagement
- We have a deep bench of volunteer leadership
- Should this be an earlier goal in order to determine what businesses in Greensboro want from the Federation in order to be considered value-add? It will be easier to define your concierge service and create meaningful new activities/services if necessary.
- What does “grow” GLFI mean? Add more people? Run another cohort? What does building on success mean? Does this mean that GLFI participants are serving in board roles or committees within a year after graduating the program?

STRATEGIC OPPORTUNITY #4: PACE OF CHANGE

- Greater penetration into markets
- Review the entire process of communications and who is responsible and pace of news. Balancing Act as we are a consensus-building/risk averse organization
- Review size of GJF Board and Executive Committee; by-laws and governance of GJF, JFS, JFG
- Consider “consent agenda” votes
- How should volunteer leadership be involved? what are board policies? It should be professional staff who carry out the policies of the board
- What should be an effective/efficient length of time for decisions? Media statements?
- Create a media policy. (Marketing Committee)
- How do we receive Greensboro Jewish community information? Do we retrieve it ourselves (“pull it”) or does it have to be “pushed to” us?
- Should the information received look backwards/recount events/people or should it always be forward-looking?
- What are the opt-in options?
- We should have multiple layers to cultivate younger generation and older
- This will take some real thought to determine how you measure engagement (metrics). I’m not sure if that will be possible. You can look at open rates and web visitors and social media followers, but I don’t know if that means “engagement.” You might look at outcomes that have some real numbers associated. Or define engagement to be increase of 10% at X, Y, Z events throughout the year.
- Goal #2 might be better stated: “Define a decision-making structure for the board and executive committee to improve timeliness and effectiveness. In conjunction, develop a process to determine how the Federation publically responds to issues ranging from political/legislative to moral/humanitarian.

STRATEGIC OPPORTUNITY #5: INCLUSIVE ENVIRONMENT

- Is the language of the S.O. too broad?
- We should review the entire spectrum of life from birth to death
- Play hard. Play smart. Play together!
- Deep and personal relationships within the Jewish community; social experiences that are interpersonal among individuals in the Jewish community. This is the glue that will and always has create/created success in for our community.
- Why is it that students who belong to one congregation don't know their peers at another congregation? What can be done about this?
- Apply concierge services to life transition points – college, empty nesters, marriage, etc.
- Review the Brandeis Cohen Center study about impact of college Jewish involvement on students raised in interfaith families:
<http://www.brandeis.edu/cmjs/noteworthy/intermarriage.html#.WrLE2HNtoKo.email>
- Search for people who aren't yet engaged
- "JewBelong" website/low barriers to involvement: <http://www.jewbelong.com/>
- Consider additional partner with/learn from Community Foundation of Greater Greensboro
- Discussions on articles like the op-ed by Ronald Lauder re Israel:
<https://www.nytimes.com/2018/03/18/opinion/israel-70th-anniversary.html>

STRATEGIC OPPORTUNITY #6: COMMUNITY LEADERSHIP

- Partner with many organizations; "adopt an agency" – eg: Habitat, IRC; volunteer – reading, donating, mentoring; Jews doing good together.
- Engagement of others; Walk the Walk and Talk the Talk
- Coordination with all Jewish communal institutions/organizations