

Jewish Federation of New Hampshire Strategic Plan



Jewish Federation of New Hampshire
Live generously!

Building a Strong and Connected Jewish Community

September 2009

Prepared in Conjunction With:



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Introduction

In December 2008, the Jewish Federation of New Hampshire (“JFNH” or the “Federation”) submitted a grant application requesting funding from UJC’s Consulting Fund for Small & Intermediate Federations for a strategic planning effort. In February, UJC Consulting made a presentation to the JFNH Board, offering to provide professional assistance to JFNH at no charge and to cover travel-related expenses for the UJC consultant through a grant from the Fund. After the Board discussion, UJC Consulting submitted a proposal to the Federation, which was accepted in April.

The ultimate purpose of the strategic planning process is to recommend key strategies to position the Federation for future success. The focus of the planning process was to answer four key questions:

1. What should be the core work of the Federation?
2. Are there priority needs in the Jewish community that are not currently being met?
3. What does it mean for JFNH to be a statewide federation with a catchment area of the whole state of New Hampshire?
4. How can Federation engage more people, increase the number of donors, and build a stronger sense of community?

A Strategic Planning Committee was formed to work with the consultant in soliciting input from the community and formulating recommendations. Committee membership was intended to provide broad geographic representation as well as diversity in age and connection to the Federation. The work of the Committee will continue, as members work with staff on an ongoing basis to assist in the implementation of the recommended strategies, to monitor progress, and to make modifications in the plan as necessary.

Community input into the planning priorities and strategies was solicited in multiple ways, including:

- An on-line survey, completed by almost 350 individuals;
- Nine focus groups, in which 81 people participated; and
- Interviews, conducted by the consultant, with 11 Federation donors.

A total, more than 400 people participated in the strategic planning process at some level.

The Committee met formally on four occasions:

Date	Meeting Content / Accomplishments
June 3	<ul style="list-style-type: none"> • Review workplan for project • Review Federation mission statement • Discuss initial results of on-line survey
July 7	<ul style="list-style-type: none"> • Discuss strategic implications of input from the focus groups and additional responses to the on-line survey • Discuss draft strategic goals
July 20	<ul style="list-style-type: none"> • Revise draft strategic goals • Review data on donors and dollars by geography • Begin identifying priority strategies to achieve the goals
August 19	<ul style="list-style-type: none"> • Discuss draft strategies for each goal area • Identify measures of success and keys to successful implementation

The next steps in the planning process are to:

- Secure Board approval of the Plan and acceptance of it as guidelines for the activities of the Federation over the next three to five years;
- Develop a more detailed implementation plan and ensure that the Federation budget is consistent with the strategic priorities;
- Communicate the Plan and its implications to the New Hampshire Jewish community; and
- Insure that the Board regularly monitors implementation status and progress toward the strategic goals.

The Strategic Plan is not a complete list of everything the Federation should or should not be doing; it will not answer every question about priorities and resource allocation. However, taken as a whole, this report is designed to provide a context for staff and volunteers to follow in future decision-making. The Plan provides guidance and recommendations as leadership begins the next steps – the development of, and then action on, a more comprehensive implementation plan.

The Plan represents a beginning, not an end, as implementation will take place over the next several years. The remainder of this report outlines the recommendations of the Strategic Planning Committee.

Mission and Strategic Goals

The work products of the strategic planning engagement include proposed mission statement, goals, and strategies for JFNH.

Mission: the fundamental purpose of an organization; the reason it exists.

The Strategic Planning Committee recommends a new, more succinct mission statement that conveys the reason the Federation exists, such as:

Our Jewish Federation connects the Jews of New Hampshire in coordinated action to preserve and enhance Jewish life at home, in Israel, and around the world.

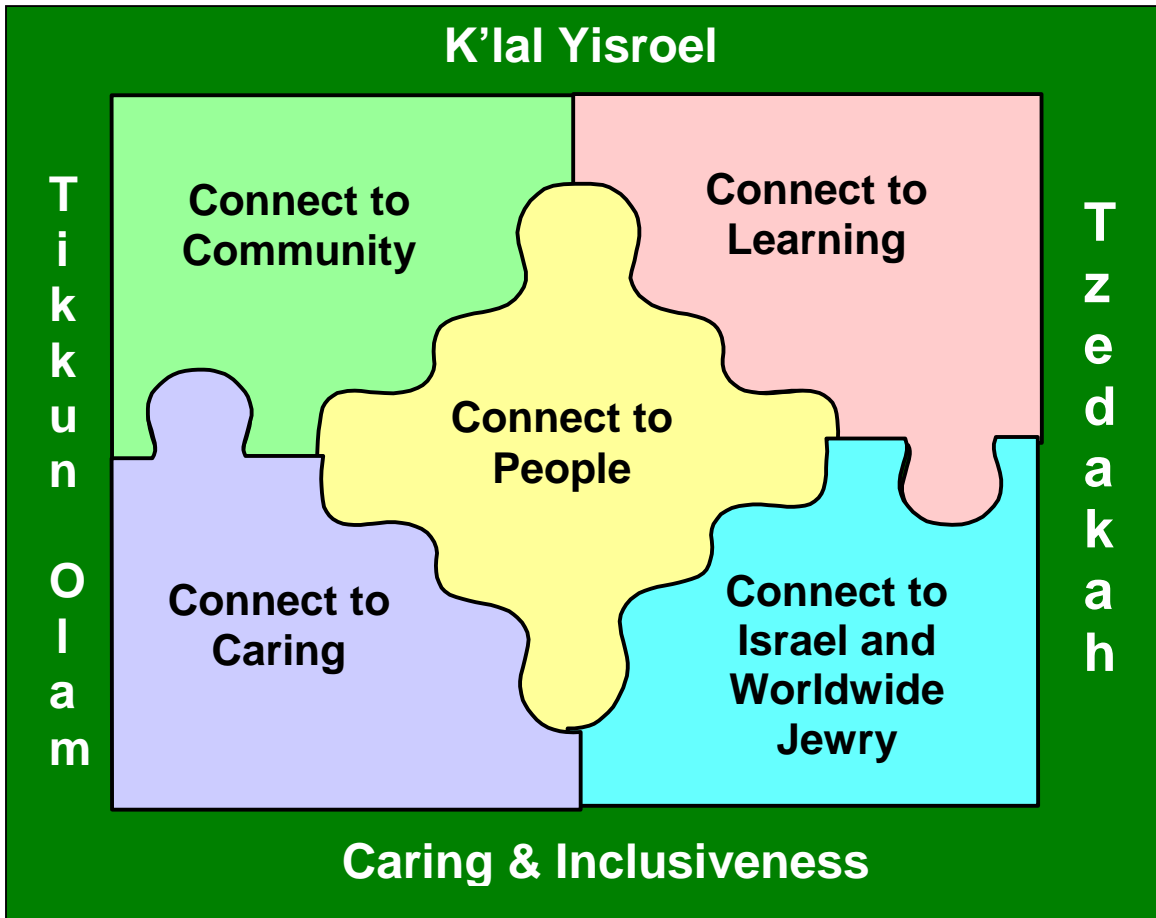
Goals: the aims of the organization that allow for the ultimate achievement of its mission. Goals drive the strategies and actions.

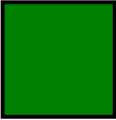
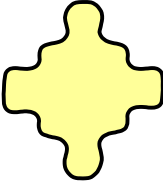
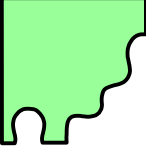
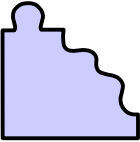
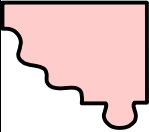
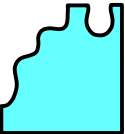
Federation's mission is accomplished by pursuing five goals:

1. **Connect to people**: Provide programming and information to bring Jews throughout New Hampshire together in a welcoming and inclusive environment.
2. **Connect to community**: Serve as a central voice for the New Hampshire Jewish community, combating anti-Semitism and advocating for Jewish causes.
3. **Connect to caring**: Provide a safety net and referrals to ensure that basic needs are met for all Jews in our community
4. **Connect to learning**: Support Jewish learning opportunities, particularly for youth.
5. **Connect to Israel and worldwide Jewry**: Create and strengthen meaningful connections between Jews in New Hampshire and those in Israel and around the world.

The goals are depicted graphically on the next two pages as interconnected puzzle pieces that fit together to create a whole that is greater than the sum of its parts. And all the parts are framed by the values of the organization, which for JFNH include tikkun olam (repairing the world), tzedakah (righteous giving), k'lal Yisroel (worldwide Jewish community), and caring and inclusiveness.

The Jewish Federation of New Hampshire



	<p>Core Values</p>	<p>In all its activities, the Federation will embody its core values of tikkun olam (repairing the world), tzedakah (righteous giving), k'lal Yisroel (worldwide Jewish community), and caring and inclusiveness.</p>
	<p>Connect to People</p>	<p>Goal 1: Provide programming and information to bring Jews throughout New Hampshire together in a welcoming and inclusive environment.</p>
	<p>Connect to Community</p>	<p>Goal 2: Serve as a central voice for the New Hampshire Jewish community, combating anti-Semitism and advocating for Jewish causes.</p>
	<p>Connect to Caring</p>	<p>Goal 3: Provide a safety net and referrals to ensure that basic needs are met for all Jews in our community.</p>
	<p>Connect to Learning</p>	<p>Goal 4: Support Jewish learning opportunities, particularly for youth.</p>
	<p>Connect to Israel and Worldwide Jewry</p>	<p>Goal 5: Create and strengthen meaningful connections between Jews in New Hampshire and those in Israel and around the world.</p>

Strategies and Key Activities

Each goal has multiple supporting strategies, and each strategy may have multiple activities associated with it.

Strategies: approaches used to achieve the organization's goals; actionable statements which, at a broad level, define the direction the organization will take to implement the goals.

Key Activities: Actions that are important components of successful implementation.

Goal 1: Connect to people

Provide information and programming to bring Jews throughout New Hampshire together in a welcoming and inclusive environment.

Strategies: Connect to People	Rationale
<p>1. Provide a limited number (no more than 5) of high profile programs throughout the year that are designed to bring Jews throughout New Hampshire together (e.g., Israel Independence Day celebration, Jewish Film Festival, a nationally-known speaker on current events, Annual Meeting and Shem Tov awards, and/or summer picnic and concert).</p>	<ul style="list-style-type: none"> • Federation has limited resources (dollars and staff) and should focus its programming efforts on a limited number of large events that have broad appeal and could attract people from across the State.
<p>2. Create one new affinity group (e.g., young leadership or business & professionals) and provide two to three programs per year targeted to this group.</p>	<ul style="list-style-type: none"> • Federation should not sponsor events associated with religious holidays, so as not to compete with congregations. • Large federation events should be designed to “build community” and provide an environment where participants feel like they are part of a larger whole.
<p>3. Identify opportunities to provide programming throughout the State, for example, by:</p> <ul style="list-style-type: none"> • Continuing multiple sites for the Film Festival or organizing a new program such as Mitzvah Day across New Hampshire; • Continuing to provide grants to synagogues to support local programming; and • Providing consultative assistance to congregations that desire to replicate programming done in Manchester (e.g., the inter-faith Seder, affinity group). 	<ul style="list-style-type: none"> • Some existing programming (e.g. seniors “lunch and learn”) should be continued as they provide services to a core constituency of the Federation. • The geographic dispersion of Jews throughout New Hampshire presents unique challenges. While Federation does not have the resources to do all programming in all locations, it can provide resources (e.g., grants and expertise) to assist local efforts.
<p>4. Continue to provide limited programming to the senior community.</p>	

Strategies: Connect to People	Rationale
<p>5. Identify one additional demographic group (e.g., teens, families with young children, single adults) and sponsor an annual program targeted to this population which is designed to attract participants from across the State.</p>	<ul style="list-style-type: none"> The Federation building can be used for programs sponsored by other groups, both Jewish and non-Jewish, as long as they assume responsibility for any incremental expenses incurred, including staff time. Federation should lend its name (co-branding) only for programming geared toward the Jewish community.
<p>6. Create an inclusive “community” atmosphere at all Federation events – for example, by assigning Board members and other volunteers to welcome participants.</p>	
<p>7. Open the Federation building to other groups that want to sponsor educational, social, or recreational programming for the Jewish community that can be accommodated within the existing budget, hours of operation, and other resource constraints.</p>	
Key Activities	
<ul style="list-style-type: none"> Convene overall programming committee to determine programming for the year, and appoint sub-committees to plan each event. Determine feasibility of hiring a part-time programming director or assigning existing staff, other than the Executive Director, to work with volunteer leadership to create and implement programming throughout the year. Get Board input on priority for affinity group. Charge a “welcoming committee” of Board members and volunteers to develop and implement strategies to make event participants feel welcome and to follow-up by personally reaching out to newcomers. Identify ways to make the JFNH building more community friendly (e.g., add a vending machine, set up a “community room”) 	

Goal 2: Connect to Community

Serve as a central voice for the New Hampshire Jewish community, combating anti-Semitism and advocating for Jewish causes.

Strategies: Connect to Community	Rationale
1. Establish an active Community Relations Council (CRC) as a committee of the Federation.	<ul style="list-style-type: none"> • Through the community survey and focus groups, we learned that people highly value having the Federation serve as a voice and advocate for the Jewish community and, to a lesser extent, for Israel. Because there is currently no functioning committee charged with this task, the Federation has been reactive rather than proactive. • Federation should collaborate with existing advocacy groups whenever possible. • The current inter-faith Seder is focused only on Jewish-Catholic relations and limited to the Manchester area. Successful programs could be considered for replication by congregations outside of Manchester (see Strategy 7 in Goal 1).
2. Work to improve inter-faith relations with major religious groups in the State.	
3. Create a system for monitoring and quickly responding to anti-Semitic and anti-Israel stories / articles / editorials that appear in the media and for proactively sharing positive information.	
Key Activities	
<ul style="list-style-type: none"> • Define role and responsibility for CRC. • Clarify relationship between CRC and VISION to avoid duplication of effort. • At least twice a year, disseminate information about Jewish holidays and celebrations to school systems, government offices, newspapers, and other groups across the State 	

Goal 3: Connect to Caring

Provide a safety net and referrals to ensure that basic needs are met for all Jews in our community

Strategies: Connect to Caring	Rationale
1. Maintain current system of referrals through intake social worker.	<ul style="list-style-type: none"> • Respondents to the on-line survey identified providing services to the elderly and the needy locally among the highest priorities for Federation. • While concerted efforts by Federation (such as ads in the Reporter) have not identified people who are going without needed services, Federation needs to continue to be proactive, particularly in the current challenging economic times.
2. Proactively seek to identify those in need of assistance (e.g., by working with area rabbis and “advertising” in the Reporter and temple newsletters).	
3. As feasible, respond to identified needs with special assistance and education programs (e.g., help for job seekers), capitalizing where possible on opportunities to collaborate with other religious, secular, and government organizations.	
Key Activities	
<ul style="list-style-type: none"> • Ask rabbis to remind congregants about availability of assistance through JFNH and to place “ads” in their newsletters to share information about services. • Provide Board with report on requests for assistance on a regular (at least quarterly) basis. 	

Goal 4: Connect to Learning

Support Jewish learning opportunities, particularly for youth.

Strategies: Connect to Learning	Rationale
1. Continue funding to congregational religious schools, increasing the amount allocated as fundraising efforts allow.	<ul style="list-style-type: none"> • While the Federation does not (and should not) provide direct educational programming for youth other than its preschool, its support of congregational religious schools is viewed positively by the community. • The preschool program provides an entry point into organized Jewish life for some families and offers important early exposure to Jewish holidays, rituals, and values for its students. Moreover, the proportion of Jewish children enrolled has remained stable at approximately 75%-80%. • The PJ library is praised by those who receive its books and is a visible example of Federation's work to families with young children. • Similarly, support for informal educational experiences such as camping creates goodwill among families with young children, while the programs provide grounding in Judaism that has been proven to have lifelong impact.
2. Continue to provide camp grants, expanding the program to include assistance beyond the first year as fundraising efforts allow.	
3. Continue to fund and support the Israel Experience program for high school students.	
4. Continue to provide a preschool program with Jewish content in Manchester, as long as the net subsidy required from the Federation for scholarships and operating expenses is less than a Board-determined target.	
5. Seek to continuously improve the quality of programming offered in the JFNH preschool program.	
6. Provide consultative support to other communities or congregations interested in beginning preschool programs under their auspices.	
7. Continue funding for PJ library, seeking opportunities to expand and improve it and engage families in other JFNH activities.	
Key Activities	
<ul style="list-style-type: none"> • Convene a committee to review the quality of the existing preschool program and implement its recommendations for improving the curriculum and services. 	

Goal 5: Connect to Israel and Worldwide Jewry

Create and strengthen meaningful connections between Jews in New Hampshire and those in Israel and around the world.

Strategies: Connect to Israel and Worldwide Jewry	Rationale
1. Continue the Schlichah program, while working to identify creative ways to expand the reach and reduce the cost.	<ul style="list-style-type: none"> • Community feedback, through the survey and focus groups, is that Israel & overseas initiatives are not as high a priority as local needs and issues. However, K'lal Yisroel, or global Jewish peoplehood, is a core value of the federation system, and part of JFNH's mission is to preserve and enhance Jewish life worldwide. • The Schlichah program is widely recognized as an effective way to bring Israel to communities and provide education about its challenges and triumphs. • In contrast, for most people, the partnership with Hof HaCarmel is seen as having little impact or value. • While travel to Israel is important in connecting Jews in New Hampshire to the larger worldwide community, it is a lower priority than other activities. Federation should take advantage of the expertise of others in planning and organizing such trips rather than devoting their limited resources.
2. Continue to fund needed programs in Israel and other overseas communities by providing financial support for UJC's partnership with the Joint Distribution Committee and the Jewish Agency for Israel.	
3. Encourage participation in Israel missions and explore opportunities to "piggyback" on missions sponsored by surrounding communities.	
4. Evaluate current allocations in light of information gained from the community research done as part of the strategic planning process.	
5. Encourage individuals to travel to Israel and other Jewish communities overseas and to participate in national or regional missions.	
Key Activities	
<ul style="list-style-type: none"> • Initiate conversations with the North Shore, Boston, and/or other area federations about having JFNH donors participate in their missions to Israel and other overseas communities. • Continue people-to-people contact with Hof HaCarmel. 	

Supporting Strategies

In the course of the Committee discussions, it became apparent that there were several additional areas of focus for JFNH that support and “cut across” multiple goals. These supporting strategies, which are key to successful implementation of the Strategic Plan, fall into five categories:

1. Financial resource development
2. Allocations
3. Marketing and communication
4. Staffing
5. Volunteer engagement

In addition, while changing the facility is not seen as a priority at this time, the Federation should remain open to emerging needs and opportunities to be more efficient and effective.

Each of the five supporting strategies is discussed below.

Financial resource development:

Enhance the financial resources of the Jewish Federation of New Hampshire for its ongoing needs and for its long-term future and survival.

Strategies:

1. Add Seacoast and non-participating areas as part of the regular JFNH campaign.
2. Build personal relationships with major donors and those with significant giving potential.
3. Encourage face-to-face solicitations and discussions with donors.
4. Explore potential new models of financial resource development, recognizing generational differences in motivations for giving.
5. Introduce e-philanthropy to the campaign.
6. Continue to evaluate and improve campaign-related events.

Key activities:

1. Work with individuals in non-participating communities who are interested in participating more actively in Federation activities to develop a model of affiliation that is not synagogue-based.
2. Executive Director to meet with major donors and those with high-end potential – either individually or in small groups – on a regular basis (at least quarterly) to update them on Federation’s activities, progress, and challenges and to discuss their philanthropic hopes and goals.
3. Emphasize endowment and planned giving, particularly with older donors.

Allocations:

Allocate dollars raised in the Annual Campaign and available through distributions from unrestricted endowments to meet communal priorities.

Strategies:

1. Align allocations with community priorities, while remaining consistent to the mission of the Federation.

Key Activities:

1. Provide summary of relevant community survey results to the allocations committee.
2. Evaluate funding for Hof HaCarmel and consider shifting dollars to other priorities.
3. Annually the Executive Committee will review the cost and benefit of major programs providing recommendations for the upcoming budget process.

Marketing and communication:

Enhance individuals' understanding of the importance and relevance of the Federation through effective, multi-media marketing efforts

Strategies:

1. Charge the JFNH marketing committee with planning and implementing a campaign, based on the adoption of the new strategic plan, to publicize the Federation's mission, values, priorities, and accomplishments – through the newspaper, website, congregational announcements, e-mail blasts, and targeted mailings.
2. Make better use of existing channels and utilize new media to disseminate the Federation's message.
3. Develop an interesting and compelling website that pulls traffic to the site.
4. Review the JFNH Annual Report format, including the presentation of the budget, to improve communication of key information (such as net cost of programs like the preschool) to constituents.

Key activities:

1. Consider incorporating the theme of “connector” into the name or byline of the Reporter to reinforce the strategic focus of JFNH.
2. Consider modifying the Federation logo to reflect the theme of “connecting.”
3. To appeal to those who are Jewish but view themselves as secular Jews (and who are interested in Jewish contact, not ritual observance) “market” the Federation programs in secular periodicals and websites that include community calendars.
4. Utilize networking technology (e.g., Facebook, Twitter) to appeal to a younger generation and create and leverage a dynamic on-line community.
5. Evaluate feasibility of utilizing technology (e.g., streaming video) to bring a geographically-dispersed population together in new ways.

6. Promote Shalom TV (part of “on demand” service offered by some cable companies) as a way of educating and connecting Jews to their heritage.
7. Evaluate the feasibility of participating in UJC’s FedWeb as host for the JFNH website (current cost for small federation is \$265/month or \$3,180 per year).

Staffing:

Ensure that there is a sufficient number of well-trained and highly motivated staff to conduct the activities of the Federation and implement the recommendations of the Strategic Plan.

Strategies:

1. Assess personnel needs to operate the Federation’s ongoing activities as well as its strategic initiatives.
2. Establish a targeted distribution for the Executive Director’s time – between three broad categories of activities:
 - a. Financial resource development (e.g., meeting with donors);
 - b. Programming and communal relations (e.g., planning and implementing programs, meeting with communal leaders); and
 - c. Administration (e.g., staff supervision, Board and committee work, writing newspaper articles and e-news).

Key Activities:

1. Identify human resource needs by:
 - a. Analyzing how existing staff utilize their time, to identify opportunities to enhance productivity;
 - b. Estimating any incremental staff time required to implement the strategic planning recommendations;
 - c. Determining if existing staff can, with appropriate training, take on responsibility for strategic plan initiatives; and
 - d. Quantifying the gap between needed and available staff.
2. If incremental staff is required, identify alternative ways to meet the need within budget constraints, including such potential options as:
 - a. Approaching an existing endowment fund holder about designating a gift for a specific staffing position;
 - b. Soliciting a one-time gift to fund a position for a time-limited period (e.g., three years).
3. President and Executive Director agree on time allocation targets and how to achieve them.

Volunteer Engagement:

Engage more people in volunteer experiences in the Federation, including programming and financial resource development.

Strategies:

1. Develop succession plans for Board and campaign leadership.
2. Encourage volunteers to provide the support necessary for the JFNH professional staff to achieve the strategic goals.
3. Develop a volunteer-driven leadership training program for young adults.

Key Activities:

1. Identify volunteers to spearhead leadership program.

Key Success Factors / Measures of Success

Successful implementation of the Strategic Plan will result in a number of important differences in how and what the Federation does. For example:

- Federation's programming will be more focused, targeted, and strategic.
- Because the core work and priorities of the Federation have been defined and a more concise and clearly articulated mission articulated, marketing can be improved so that more people know and understand the extent of Federation's work.
- There will be a new emphasis on creating a welcoming and inclusive environment at Federation events and programs, so that all participants, no matter where they live, feel they belong and are a part of the community.
- With an active Community Relations Council, there will be a more organized approach to having the Federation serve as a voice for the New Hampshire Jewish community.

While these, and the other changes described in the Plan, are important, the ultimate success of the Strategic Plan should be measured by five key metrics:

1. Increase in the number of dollars raised for the Annual Campaign;
2. Increase in the number of donors;
3. Increase in the number of participants in Federation-sponsored programming;
4. Increase in the number of Federation volunteers, including those serving on committees and working on events; and
5. Increase in the number of donors and dollars from areas outside of the Manchester / Bedford core.

Regular progress reports to the Board should include not only a summary of activities and accomplishments, but also statistics on these metrics.

The most important keys to the successful implementation of the Plan's strategies relate to resource availability and the ability to focus on the priority strategies and activities identified. While the staff has primary implementation responsibility, the Plan's goals will be achieved only if the Board and other volunteer leaders are committed and devote their time as well. Only then can additional dollars be raised so additional resources can be devoted to building a strong and connected Jewish community in New Hampshire.

As Jim Collins says in Good to Great: The real question is not, "Why greatness?" but "What work makes you feel compelled to try to create greatness?"... If you're engaged in work that you love and care about...then the question is not why, but how.

Engaged in work that they love, the Federation, its staff, and its volunteer leadership have begun to answer the question "how" by developing this Strategic Plan. And while the Plan outlines the path for the community; the answers to its successful implementation are in the skills, determination, and resources of its people – so that JFNH's mission will continue and the New Hampshire Jewish community will be strong and connected.