



## **Strategic Plan**

As approved by the Board of Directors

By the Strategic Planning Committee, Staff Leadership Team  
& EMD Consulting Group

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## Executive Summary

Our society – locally and globally – is rapidly changing. In 2014, Jewish Federation of St. Louis completed a demographic study of the St. Louis Jewish community. Among the study’s findings were that the aggregate number of Jews in St. Louis (measured by those identifying as Jewish) is growing, but a large number of those people are not engaged with the community. Other key findings were that almost half (48%) of married couples in St. Louis Jewish households (households with at least one Jewish adult) include a non-Jewish spouse, and 24% of Jewish households “cannot make ends meet” or are “just managing” financially.

Informed by the study, Federation has undertaken a planning process to assess the community landscape and determine Federation’s strategic priorities and direction that best position it to fulfill its mission: mobilizing the Jewish community and its human and financial resources to preserve and enhance Jewish life in St. Louis, Israel and around the world.

Four strategic priorities, or core commitments, have been identified as lying at the heart of the plan and guiding Federation’s work. They are:

- Expand and strengthen an engaged, vibrant and flourishing St. Louis Jewish community
- Secure the wellbeing and safety of individuals within the Jewish community
- Strengthen our connection to Israel and the Jewish People worldwide
- Develop the financial and human resources, and infrastructure, needed by our community

The plan breaks new ground in three key respects. First, it embodies a goal of seeking to foster community engagement among *all* segments and members of the St. Louis Jewish community, utilizing a variety of focal points, both religious and non-religious, recognizing the diversity of the community and the need to connect with people on a number of different planes – religious, cultural, historical, ethical, etc. The contemplated approach involves meeting people where they are and supporting a wide range of opportunities for individuals and groups to engage with and within the community. The plan also recognizes the need to work hand in hand with civic and governmental leaders and non-Jewish groups to promote a vibrant broader St. Louis community, recognizing that the Jewish community cannot thrive unless the larger community of which it is a part is thriving.

Second, the plan provides for a new Jewish Community Foundation (JCF) model to replace the “Planning and Allocations” functions that traditionally have been the hallmark of Jewish Federations around the country. The JCF will take a “needs-first” approach to develop a case for giving based on community needs, and a donor-centric, advisory approach to philanthropy based on program impact.

Third, the plan clarifies that Federation works primarily through supporting and collaborating with existing agencies, synagogues and other organizations, and Federation will directly provide services only in limited circumstances, where it can more effectively and/or efficiently do so, gaps exist or there is a need for community-wide coordination. As a corollary to that, the plan provides for the consolidation of internal operations to provide dynamic, customer-focused support for IT, HR, marketing, security, endowment management and accounting services, which eventually could be developed into broader community support services.

The plan also calls for the development of a regular, ongoing process by which the Federation Board of Directors shall establish key funding priorities to guide its work. This process includes regular community feedback and the use of program evaluation based on data to ensure that our work effectively responds to the community's most pressing needs.

The strategic plan is structured as follows:

1. Mission
2. Vision
3. Core Commitments
4. Organizational Priorities

In addition, annual Action Plans will be developed. However, those plans are beyond the scope of this document.

#### Action Plan

The Federation's strategic plan represents a conceptual outline for our future operations. Following final adoption by our board of directors, we will prepare an implementation plan to put the conceptual plan into action. Action plans will be developed that identify specific strategies and actions, timelines, metrics and responsible parties. This process likely will take up to a year to fully establish and implement the plan. Accordingly, there necessarily will be a transition period during which operations and planning will continue according to the model presently in place. The Federation recognizes that any changes implemented in our planning and community investments (allocations) going forward must be managed in a deliberative and careful way to ensure the stability and continuity of existing programs and resources.

# Jewish Federation of St. Louis Strategic Plan

## Mission

Jewish Federation of St. Louis mobilizes the Jewish community and its human and financial resources to preserve and enhance Jewish life in St. Louis, Israel and around the world.

## Vision

An engaged, vibrant and flourishing St. Louis Jewish community, in which individuals live with dignity, meaning and purpose, and a sense of belonging to the Jewish People, as part of a life well-lived.

## Core Commitments

The Jewish Federation will focus its work on achieving the following core commitments:

### **1. Expand and strengthen an engaged, vibrant and flourishing St. Louis Jewish Community**

- Promote a vibrant Jewish community *for us here and now*, and into the future, because we find Jewish life – in all of its diversity – of value as part of *our lives*, well lived. Foster a Jewish community that is compelling, inclusive and welcoming to every generation, family and individual circumstance in all of its religious, geographic and personal diversity. Promote valuing what it means to be Jewish in ways that lead to Jewish identity enduring among present and future members of our community.
- Deepen and expand Jewish education. Invest in, support and/or create serious, deep and attractive Jewish educational opportunities with trained educators and compelling speakers. Ensure that all approaches to Jewish life are developed, religious and non-religious.
- Build and support Jewish community and social networks to increase engagement. Invest in, support and/or create community gatherings, events, and experiences that offer the potential to engage the widest cross-section of our community, whether together as a whole or through the cultivation of smaller groups having common interests. *Meet people where they are.*
- Mobilize around Jewish values, *e.g.*, improving the world, caring for the needy, welcoming the stranger and promoting social justice. Invest in, support and/or create efforts to strengthen our region on the basis of Jewish values, recognizing that our community cannot thrive unless the entire region is strong. Expand engagement both within the Jewish community and with external groups, mobilizing our community to promote regional sustainability and economic growth where consistent with our overall mission.

## **2. Secure the wellbeing and safety of individuals within the Jewish community**

- Care for those in need. Strive to ensure that the material and spiritual needs of those in need within our community are met, in a manner permitting them to maintain their basic dignity. Invest in, support and/or create efforts to meet the basic needs of our community members. Recognize the special obligations we have to meet uniquely Jewish needs and our general obligations as Jews to anyone in need.
- Foster communal safety. Promote the safety of the St. Louis Jewish community through ongoing anti-bias education, security training and other means. Invest in, support and/or create programs that support our community's safety through physical infrastructure investment, coordinated safety practices and sharing of information. Support the teaching of the lessons of our history to help combat individual and institutional bias wherever it exists.

## **3. Strengthen our connection to Israel and the Jewish People worldwide**

- Express support for Israel in terms reflected in its own aspirational Declaration of Independence: as a refuge for all Jews and defense against anti-Semitism; as a source of flourishing for the Jewish People; and in a manner consistent with human rights and justice for all. Encourage and model respectful and inclusive dialogue of a wide range of views. Support economic growth in both Israel and our region through investment and policy advocacy. Promote Israel advocacy through a broad tent approach.
- Strive to ensure that Israel remains a vibrant democratic homeland for the Jewish people. Invest in strengthening its core institutions to preserve its democratic civil society and pluralistic character.
- Recognizing our collective responsibility as Jews, invest in, support and/or create efforts to connect with the Jewish People globally, through service, education and cultural and economic exchange.

## **4. Develop the financial and human resources, and infrastructure, needed by our community**

- Financial Resources: Help identify and achieve donors' philanthropic goals by taking a donor-centric, advisory approach that aligns community needs with individual passions and interests and incorporates Jewish philanthropic values. Grow not only the annual campaign but also targeted gifts and legacy and foundational giving. Report on and celebrate Federation's total fundraising impact on the community, including the annual campaign, targeted gifts to Federation, targeted gifts to other community organizations obtained with Federation assistance, grants and legacy and foundational giving.
- Human Resources: Identify, recruit, train and develop exceptional human resources, and support collaborative workplaces in the community that are recognized as great places to work. Create a leadership map and pipeline for lay and volunteer leadership, within

Federation and the broader community, investing in best practices that will lead to organizational development.

- **Community Infrastructure:** Leverage space, technology, and communications infrastructure for the benefit of all who are served and to attract engagement in the community. Find opportunities to build shared services that increase efficiency and impact and decrease duplication and overlap.

### **Organizational Priorities**

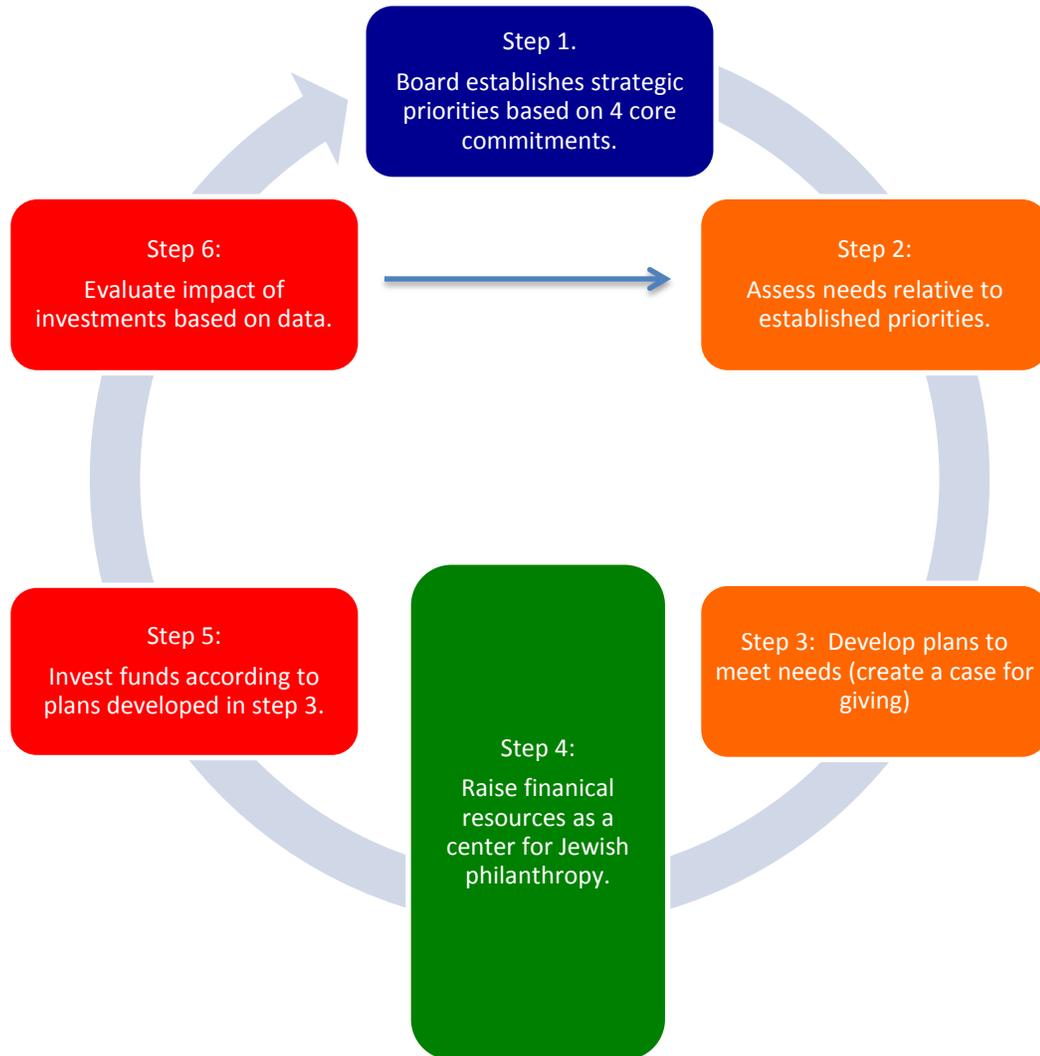
- 1. Create a Jewish Community Foundation that repositions Jewish Federation from an aggregator and allocator of funds to a needs-driven, results-focused thought leader, serving as a donor-centric philanthropic partner with our community.**

In the past, a greater degree of clarity existed about the priorities and needs of the Jewish community (rescuing Jews from the former Soviet Union, providing social services when other agencies would not, and supporting Jewish education through a robust network of providers), as well as how to implement solutions. Our ability to secure resources was successful because the case for giving was understood. Thus we could ask for funds first, on the basis of trust, and then make decisions on how to spend those resources after we raised them.

In a world of expanding philanthropy, both within and outside the Jewish community, this “trust us” model no longer resonates with some. Today, many individuals have different preferences for pursuing their charitable involvement than did people in the past; we have a more sophisticated and empowered generation of donors, many of whom want to give in ways that enable them to make a direct, tangible and measurable impact on the issues most important to them.

To address these trends, the Jewish Federation will integrate its traditional “planning and allocations” function with its philanthropic work to operate on the model of a Jewish Community Foundation. The JCF model involves a six-stage process typical of non-profit foundations, illustrated and described below.

**Diagram: New process of the Jewish Community Foundation**



In the first step, the Board of Directors, in consultation with the community and based on community data, will establish strategic funding priorities. In step two, Federation will assess community needs relative to these funding priorities. In step three, it will develop plans to meet those needs. These plans will form a case for giving.

In Step 4, Federation will work to secure funds to invest in agencies, programs and services to execute those plans, approaching that work in a more comprehensive manner than the fundraising and development approaches of the past. In these efforts, Federation will work as partners and advisors with donors, paying close attention to their desires and needs, and help facilitate giving to the annual campaign as well as other causes internal and external to our community, based on Jewish values. In so doing, Federation will function as a center for Jewish philanthropy, which will encompass not only the annual campaign but also targeted gifts, planned giving, donor advised funds, our supporting foundations, Women's Philanthropy and other affinity groups.

Once funds are raised, investments will be made based in agencies, programs and services based on the plans previously established. And, after an appropriate period of time, funding

investments will be evaluated for impact based on data and results. Depending on the time frame, the process begins again either through a needs assessment (step 2) or via a return to the strategic priority setting (step 1).

**2. Implement an intentional approach to the provision of direct services by Jewish Federation, prioritizing support for and collaboration with trusted partners, and limiting direct services to those that can be more effectively or efficiently provided by Federation.**

A direct service is any service that the Federation manages or provides directly to institutions or individuals, other than program/institutional funding support, convening activity or donor philanthropy. The key question is when and under what circumstances should Jewish Federation take on and execute a direct service, rather than support it elsewhere in the community?

In general, Federation's strong preference is that services be provided by and through community agencies and organizations. However, there are some services that are more effectively and/or efficiently provided at the federated level. Additionally, there are some gaps in programs and services that the Federation may step in to fill, either temporarily or permanently.

In cities having larger Jewish communities than St. Louis, the optimal model may involve Federation providing few, if any, direct services, instead relying on community organizations to provide services. In cities having smaller Jewish communities than St. Louis, community organizations capable of providing needed services may not exist; accordingly, a Federation may play a larger role in providing direct services.

In the context of the St. Louis Jewish community, given its nature and size, the proper approach is believed to be a mixed one, tilted heavily towards relying on community organizations. Federation is committed to primarily pursuing its mission through supporting and collaborating with agencies, synagogues and other community organizations, and undertaking to provide direct services only in limited circumstances, where Federation can more effectively and/or efficiently provide such services, gaps exist or there is a need for community-wide coordination. Examples of the latter include providing security services for the community, or concierge services, which direct community members to various organizations according to their stated needs and interests.

Federation will review and assess, on an ongoing basis, the direct services currently being provided by it, and formulate an exit strategy that ensures continuation of valuable community services if it determines the provision of direct services no longer is warranted, or such services can be better provided by another organization. Further, Federation will develop a process and criteria for evaluating and determining whether other direct services may be provided in the future.

**3. Strengthen key infrastructural components, to ensure good decision-making, efficiency and effectiveness**

Technology and systems are rapidly changing and organizations that do not keep up with these changes risk falling behind. And, people are not always valued enough. Jewish

Federation wishes to strengthen its internal infrastructure, both its systems and its people, and to eventually offer infrastructure-strengthening support to organizations within the Jewish community.

In the short term, Jewish Federation will focus on strengthening:

- Human Resources management systems and processes that create a culture of collaboration, professionalism, accountability and development, and that attracts and retains the best team members
- Information systems that ensure protection of Federation information and provide ease of use and access by stakeholders
- Database access and tools that facilitate improved decision-making and tracking impact through metrics
- Financial stewardship of community and Federation resources by ensuring timely, accurate and transparent management and financial reporting, and reliable and effective controls

Working with agencies, synagogues, community organizations and other stakeholders, Federation also plans to develop a community security model that provides leadership, accountability and resources towards promoting the safety and security of the St. Louis Jewish community.

Jewish Federation also plans to eventually develop a shared services model that could be offered to stakeholders, to ensure top quality and optimize resources in the following areas:

- Security
- Finance/accounting/fiscal agency
- Information systems
- Insurance/risk management
- Facilities management
- Human resources
- Marketing

### **Action Plan**

Action plans will be developed that identify specific strategies and actions, timelines, metrics and responsible parties.

## **Strategic Planning Committee**

### Board:

Gerry Greiman, Committee Chair  
Patty Croughan  
JJ Flotken  
John Greenberg  
Robert S. Newmark  
Ruth Raskas  
Michelle Rubin  
Sue Schlichter  
Les Sterman  
Timothy Stern  
Harvey Wallace  
Hank Webber  
Greg Yawitz

### Staff:

Emily Bornstein  
Stephen Cohen  
Sonia Dobinsky  
Don Hannon  
Michael Oberlander  
Andrew Rehfeld  
Susan Scribner  
Nancy Tully

## **Staff Leadership Planning Team**

Emily Bornstein  
Jean Cavender  
Stephen Cohen  
Sonia Dobinsky  
Marci Eisen  
Don Hannon  
Cyndee Levy  
Emily McLean  
Michael Oberlander  
Andrew Rehfeld  
Susan Scribner  
Karen Sher  
Nancy Tully

## **Consultants**

EMD Consulting Group:  
Gary Dollar  
Kari McAvoy