

September 2015

Elul 5775

Dov's First-Year Report to the Board

Dear Board members,

There I was, just a few months ago, in the middle of the Negev desert. My kids and I had spent several days in Ofakim, Arad and Erez. We did yoga classes, art classes, home hospitality, a treasure hunt, and more.

And my kids turned to me and said, “this is so cool. Your job is awesome.”

On the one hand, I thought, I could fess up and explain that yes, my job is awesome ... but this part wasn't really the *main* part of my job. But on the other hand, temporarily basking in my children's fleeting approval, I thought to myself, this actually *is* my job. Connecting them to Israel, making them proud, and strengthening their Jewish identity. So I took credit.

And I was right to do so. Because standing there in the desert, looking at the beauty of our partnerships and connections, I realized what my kids were actually seeing when they gave out the coolness accolade. They saw that it belonged to them. They saw us caring for those in need, building Jewish community, and saving lives.

That's what I've been trying to learn, to initiate and to implement this past year as CEO of our Federation: create a wider sense of belonging. This past year I've met with hundreds of rabbis, donors, lay leaders and community activists. I've held dozens and dozens of parlor meetings, breakfast briefings, and update meetings. I've spent a significant amount of time learning, and an even more significant amount of time planning. I've spent time on our strategic plans, our thought-culture, our passions and priorities. And I've tried to gently steer us in a few new directions.

So here we are, one year later, and I want to share with you some of my thinking about what I've learned and achieved. This year has been a whirlwind of activity that has shown me the strengths and challenges of our Federation and community, and has helped me to map out our thinking on our role and possibilities.

I'm grateful for your friendship, guidance, partnership and thoughtfulness. I'm especially grateful for Leslie's leadership, and for her friendship and counsel. I was fortunate to also

receive much useful guidance and mentoring from Lori Klinghoffer. There have been numerous occasions in the last year in which I've looked to our Board members for your advice and counsel. I'm grateful for all of your support, your wisdom, and your commitment.

Like all of you, I want to see an inclusive, passionate and inspiring Jewish Federation, convening and supporting a vibrant Jewish community, and promoting new and innovative thinking. Every day I've found areas that reinforce that direction and convince me that this aim is feasible, attainable and realistic.

But not easy.

With that in mind, I believe that you deserve to see what my conclusions and horizons look like at the end of this first year.

Where we were isn't where we are. We've come a long way and there's much more for us to do as we build on our prior successes and achievements. In lengthy discussions with all of you, I've found several key areas of challenge, which I'll address here.

We have some incredible achievements. We have an excellent professional staff, nationally and internationally recognized Israel programming, a strong culture of fundraising, dedicated and smart lay leadership, and more. But there's always room for improvement and self-examination, and the achievements have to be examined in this light too.

With that in mind ... here are my conclusions on this year. Let me point out the obvious: first, that I'm focusing this report on the role of the CEO in creating and strengthening the professional base of the Federation (*and not on policies or lay structures*). And second, that this is a very personal document, and *doesn't represent anyone except for me*. There's much more for us to discuss in terms of lay leadership, Board roles, future strategic directions – but that's not for this document.

I have three things to tell you. They focus on culture, fundraising and values.

1. Culture beats strategy every time.

It's not even a fair fight. The best strategic ideas mean nothing in isolation. Culture is everything.

I've involved myself heavily in the HR process this past year because I believe that a strong, healthy and inspiring Jewish organization needs the right kind of cultural mix. I've hired some new professionals not just for their ability to meet the job specifications, but also because they can help us grow to be a good Jewish place to work. I met other candidates who, on paper,

seemed perfect fits for various open positions, but I turned them away because they wouldn't have helped advance the culture we need to build.

What is that culture?

It's a culture in which the professional team is rewarded, thanked, recognized and appreciated. A culture in which our Board and community are proud of their work. And a culture in which our Federation professionals work collaboratively with others in the community for everyone's benefit.

This culture has three main elements: accountability, healthy debate, and responsibility. In Hebrew, we call this orientation 'ראש גדול', literally a 'large head,' but meaning someone who thinks big and responsibly (and accountably). We need more professionals who take the initiative and ask questions. We have to encourage more debate and dissent.

I meet regularly with different groups of professionals and administrative professionals; an outside consultant has run a 360 anonymous analysis on my behavior and relations. And we've changed the culture of staff meetings, senior management team meetings and annual review procedures. We're creating a culture of lively debate and ownership.

2. We're good at fundraising. But there's more than one kind of fundraising.

Our annual fundraising efforts are doing better and better every year. In the 2015 Campaign year, under the leadership of Maxine Murnick and Jeff Korbman, we raised a massive amount of money.

But if you unpack the numbers you'll notice some interesting things.

- i. We're really good at raising money in a crisis. It's a testament to our passion and values, and our ability to connect the forces of our community.
- ii. We're raising more and more money for tomorrow, and less for today.
- iii. We're not raising nearly enough for what we want to do or should be doing (we can, and we will, though).

We have a terrific team of dedicated professionals and lay leaders. But every year our annual UJA campaign has slipped. From 2010 to 2014, our annual Campaign lost some 5,000 donors. We know the reasons: low donor engagement, prospects aren't connecting to us.

So we need to start laying the groundwork now to be relevant, passionate, engaging, attractive and meaningful to the community's leaders and donors of tomorrow. Does it mean neglecting

our current top generous donors? Absolutely not. But we need to expand geographically and demographically at the same time. And what I've noticed this last year is that a strong, clear vision of expanding our 'lower-gift' base actually boosts our conversation with our current major donors and leaders. They want to hear that we have a plan. They want to know that someone is coming up after them, to continue their work and their values. They want to be inspired.

The challenge is that we've been irrelevant to many in the community. I keep hearing that Federation overemphasizes solicitation in the fundraising process at the expense of cultivation and stewardship (I'm not convinced it's true, but I keep hearing it). We don't build meaningful relationships with non-major givers (meaningful for them, at least). And many of those who do know us, don't like us. Or they like some of our programs without realizing our responsibility for them. How many CRC supporters, or PJ Library recipients, or Holocaust Council participants, or Birthright families, actually 'get' Federation? Or even know that it's because of Federation that they get these amazing things?

This also means our Board needs to do more to support Campaign and Engagement. We need you now more than ever:

- to attend, speak and cultivate relations at events,
- to help promote the expansion of the donor base
- to help solicit
- to give a generous gift
- to bring in others

Over the coming year we'll work to expand dramatically our base numbers, our activities and events, our LGBTQ outreach, our interfaith outreach, our missions and more. What that means is deepening the following emphases:

- (1) Further boost the Campaign presence in Union County, with an increased emphasis on parlor meetings, cultivation, and rotations of Campaign Staff and others in the region. We have structures and connections there that are easier to 'rebuild' than to 'build.' If we do this right we can expand in Morris and Sussex, and then to Somerset.
- (2) We've hired more major gifts fundraisers, Outreach professionals, a Community Campaign Director, a full-time Missions Director, a Synagogue Liaison Director and more. Full benchmarking matrices for success are currently in development, and we'll report back regularly on progress and achievements. Visual dashboarding was introduced for the first time at Board meetings this year (the visual representation of campaign statistics in easy-to-understand dashboards), and we'll do more in the year ahead.
- (3) We're implementing a thorough moves-management strategy. The first stage encompasses all Campaign staff and the CEO, and will quickly include Senior Staff, then

all other necessary professionals. If you have a meaningful conversation with a donor, within three days that information needs to be captured and recorded. It's an easy statement to make (I've seen models like this succeed well and others fail spectacularly). The test will be in our willingness to cooperate as an organization that reaches out strategically. At a later stage we'll widen the conversation to include you, our lay leadership.

- (4) Similarly, our Campaign department is launching a donor-profile forum – a roundtable discussion to discuss cultivation, solicitation and stewardship policies and ideas for specific individuals. The first stage will be confidential, and will be limited to Campaign staff and the CEO, but will quickly widen to include senior lay Campaign leadership.
- (5) We've created a new Events Division under Julie Rosenberg's direction, and are now moving to a stage in which no events will be planned or programmed without coordination (a few slip-ups here and there, but we'll work those out). This will allow us to build the next stage – a full events checklist, a coordinated strategy for events management, regular speaker training, a unified strategy for event guests (which GMW VIPs go to external events, SOPs, payment rules, etc.) and, within a year or two, a full program of proactive Speakers Bureau initiatives.
- (6) Fundraisers and other professionals will learn more about storytelling. We've started training and practicing on a limited scale, and I hope we can widen this to our lay leadership in the year ahead.
- (7) I'm going to examine the effectiveness of shifting to a January-December Annual Campaign, within the next 2-4 years. Too many people are confused; too many people can't overcome the 'weirdness' factor when we try to explain the current Campaign year calendar. First thing will be to examine best practices and examine opposition. Simplicity is the key: a '2017' Annual Campaign should mean what it says and say what it means. It starts at the beginning of the year and ends at the end of the year.
- (8) Missions will be expanded and streamlined, and the separation between Campaign, IPC and others on mission-planning will be removed. All missions will be required to coordinate and create follow-up plans. We've hired a new full-time Director, Heidi Kuperman.
- (9) We're launching a Men's Campaign. We know it's a key and untapped demographic for us. Beth Jenis is our first Director, and she is already working on the Campaign structure, events and mission plans.

(10) Super Sunday will be run by Campaign (instead of marketing), and it will include an Israeli site, a Florida site, and wider activities to partner with synagogues. Lance Jacobs will lead the charge, supervised by Jeff Korbman.

(11) My breakfast series at various diners was aimed at raising the public profile of Federation in the community, with no solicitations. It wasn't so much about the impact on the individuals concerned (though it's had a nice reach) – it was more about showing us that we can do this. But so can you, our Board leadership. In the coming months we're going to look at how to have this as a "Federation" show, not just a "Dov" show. And not just breakfasts in diners, but also parlor meetings. Susan Solomon has been promoted to Chief of Staff, and she'll work on this in the year ahead.

You've hopefully noticed that many of the above items are 'works in progress.' Some of them are in continual trial-and-error mode. The underlying principle behind this strategy is what you might call **failing upwards**. As a Federation culture, we're encouraging our staff to take risks, innovate, create new ideas and propose new ways of doing our work. Does it always succeed? No – *and it shouldn't*. The essence of innovation is learning. In the for-profit world, as in the Jewish communal mission-driven world, we accept failures as the sign of innovation, creative thinking and movement.

3. Without our core values, we're not going anywhere.

There are four core interlinked values that are the centerpiece of our values;

- i. How we treat our professionals
- ii. How we treat our community
- iii. How we talk about who and what we are
- iv. How we prepare our leaders

i. How we treat our professionals

We've had a round of promotions and salary increases, and I'm incredibly grateful that we were able to finally give an across-the-board cost-of-living increase too, after several years of stagnancy. We've increased the impact of our all-staff meetings, our "lunch with the CEO" meetings, and every day I walk around to talk with our staff. I'd like to ask you, our Board members, to start doing the same thing. Walk around when you come to see us in Whippany or Scotch Plains. Meet our people, talk to them, and ask them questions.

Simple things like removing sign-in books, redesigning the upstairs lobby and downstairs lunch room – have had an immense positive impact on our colleagues. And there’s more for us to do.

Now that we’ve unified the layers of senior management, and changed the format of senior management team meetings, we’re solidifying a strong team.

Four additional areas that we’ll be discussing in the year ahead are as follows (both as professional management responsibilities and as recommendations for Board review):

- (1) How *secure and safe* are we? We’re beginning discussions with our colleagues in SCN to improve our security procedures dramatically.
- (2) How *smart* are we? We’re reviewing the IT contract, and beginning a discussion on our technology vision, for who we are and how we want to be a Federation that uses technology and information strategically.
- (3) How *inclusive* are we? What are our policies for parents of young children, people with special needs, LGBTQs, interfaith families? How consistent and fair are we with our employees when it comes to vacations, flexibility and more?
- (4) How *Jewish* are we? What Jewish content pieces can we bring to our daily practice? How can we bring values to bear on our work? Bringing in rabbis, educators, an Ulpan is a start (and we’re working on these), but is there more we can do?

ii. How we treat our Community

The merger of Central and MetroWest still hasn’t been completed. But now we have a CEO’s office in Scotch Plains, we’ve moved Senior Staff and Campaign staff in rotation to the office, we’ve held numerous meetings and several parlor meetings in the area, and planned more.

There’s a lot more to do, and this is going to be a priority for us in the year ahead because it’s essentially ‘low-hanging fruit’ for us. We need more goodwill, and more presence, to generate real results. That means more meetings, more face-time and more positive comments. And I’d like to recommend that those of you who aren’t normally spending time in our Scotch Plains office, or in Union County, come down and visit on a more regular basis. There’s a lot of love there. And good coffee.

There’s much more for us to do in Morris, Sussex and Somerset Counties too. We’ll look at ways to increase our connections, our presence and our meetings.

Leslie made a huge push on showing humility and respect in listening to our agencies. I think we’ve made significant progress there. Now we have more synagogue outreach with Aviva Roland, our new Outreach Director, and we’re planning an expansion of CSS (Community Security Services) and more, under Stanley Stone, who was promoted to Senior Vice President.

Howard Rabner, our CFO, has led the charge in opening up our procedures that affect agencies and showing a well-respected and appreciated level of openness and cooperation. Synagogue relations will be a key factor in this outreach. We need to be careful about how new initiatives (and existing ones) are presented to the rabbis – they need to be partners in creation. We can't create a great finished product and just present it to them; they won't be invested in its success and they'll vote with their feet.

The above will also help us in a meaningful conversation with The Partnership and other agencies on roles and branding. We'll need to tie the work of the Holocaust Council, ABLE, CARES, CRC and Global Connections closer to each other and to the Federation.

In the coming year we'll need to think carefully about how we plan and strategize. Right now we mostly allocate. That means we're reactive rather than proactive. As the Commissions structure takes shape, this area will become a priority. So I'm proud that Jessica Mehlman has been promoted to the position of Planning and Allocations Director.

It's logical that when we talk about community we instinctively talk about Israel too. We're one of the most Zionist federations in North America today. We're proudly connected to our Israeli partnerships on a variety of meaningful levels, and these connections are felt on both sides.

The logic of our partnerships has been opportunistic (that's a compliment), but we lacked an overall guiding rationale. There are very few of us who are able to coherently explain and passionately encapsulate the single case for our collective partnerships in Israel and overseas in a meaningful (and transmittable) way. Just adding partnerships (and never deleting them) because the opportunities were present has left us with excellent individual partnerships, but no real way to explain our unique identity because of these partnerships. If we 'do' Ofakim-Merhavim and Arad and Erez and Hurfeish and Rishon LeZion and Raanana and the Gush and Cherkassy, Ukraine .. what are we actually 'doing'? And why? Why not other communities alongside them? And if we're not thinking about our partnerships geographically but rather thematically ... what are the actual themes? And – perhaps even more importantly – can we all agree on what these themes are, and be committed to articulating and owning them?

Therefore:

- (1) We're building a clear concept of identity for our Israel and Overseas program. Amir Shacham and Paula Saginaw have a clear and simple vision of four platforms and themes – from the old phrase 'Ufaratzta.'
Negba ('to the Negev') as both a geographic and cultural/Zionist orientation;
Kedma ("East" and also with a connotation of both 'forward' and kedem-past), connecting us to thematic areas of civil society, Arab-Israelis, religious pluralism and progress with helping the vulnerable, a 'shared society' for all Israelis;
Yama ('to the sea') all non-Israel overseas programs and Jewish Diaspora issues;
Tzafona ('to the north') all our Israel-oriented North American programs.

- (2) We're increasing the number of Shlichim (including Rishonim). We get great value for what we have, and we can do a lot more with them. We've created a national model of a '*mishlachat*' (team of Shlichim) – we're the only Federation with such a large group of all levels of Shlichim, working as a team, under one umbrella of supervision with organized recruitment, screening and training. Communities from around North America send their representatives here to learn from our model.
- (3) We're looking at how the GMW Campaign and stakeholder vision includes communities in Arad, Ofakim-Merhavim and Erez. If you give a donation in one of our flagship communities, you're 'in' GMW. It shouldn't matter where you live: GMW isn't defined or bounded geographically. We would be the first North American Jewish Federation to claim a constituency in Israel, and stake out real 'membership' there. If framed right, this could be an extremely compelling and exciting vision. Amir will lead this vision and you can expect to see the launch of this new direction on Super Sunday.

iii. How we talk about who and what we are

We've had many (positive) messages that consist of our tagline/logo, a stock photo of happy smiling people and a vague message about community. But proclaiming our existence isn't really branding or marketing. We need clear and compelling calls to action. Even to just 'raise awareness' we need to be remarkable, passionate, captivating and meaningfully relevant.

- i. Our marketing has come a long way in focusing on our brand. We are "Federation," or "The Jewish Federation" – not "JFed" - a term that, at best, confuses and at worse, degrades our branding efforts. (The hashtag #IamGMW is a great step forward here too.) We'll (gently) enforce some branding discipline in the months ahead, so please be ready.
- ii. Our message must include the donors in our efforts. We need to highlight our leadership and donors in social media and marketing, making them a focus of our efforts. We're great because our leadership is great. We're great because our donors are great. We should be focusing on what our donors and stakeholders need (values, affordable Jewish life, meaningful connections) rather than just on money and Federation need. The latest round of Campaign /Marketing short profiles is a great step in that direction: frequent interviews with our donors, our lay leaders, and our rabbis, with short videos and stories, creating a library of "The Story of Us" online.
- iii. We're going to see more emphasis on storytelling. I think we're reaching a stage where more and more of our professionals are realizing that they have to know the basics of our story. Not everyone is going to be standing up and telling our story in front of a crowd

(not even all of our fundraisers and senior managers). But we need to ensure that everyone in the Federation community understands and can articulate a simple message: we only do three things – **we care, we build, we save**. We need this so we can cut through the confusion and clutter with a defined identity that is specific and consistent. Everyone needs this.

- iv. We'll start discussing a messaging effort that takes pride in our role in providing PJ Library, Birthright, One Happy Camper, The Partnership, CRC, Holocaust Council, ABLE, CARES ... and all the dozens of programs that benefit the community, which would not exist without Federation. Many (most?) people in the community don't even know this. Especially in the synagogue community. We've started a search process for a new Chief Marketing Officer and a full-time Social Media Manager. Both of these positions will help us greatly. I'm grateful that Melanie Roth Gorelick is stepping up to be interim Chief Marketing Officer to help us in this transition period.

iv. How we prepare our leaders

In the coming year we're going to create a Leadership Pipeline structure. This will be a single professional, (Stacey Brown, working with Amy Wagner Biloan, our new Engagement Director) who will map out all current leadership opportunities in Federation, in our agencies and (as a second tier), synagogues, schools and institutions. She'll also create strategies for referrals, missions, leadership training programs to bring people up through the Pipeline. The idea is to map out several hundred leadership positions from ten years from now for Federation and agency and other leadership roles. (Here's where we want you to be in 2025, Federation President, Agency Campaign Chair ... here are the seven things you need to do over the next ten years – lead a mission, attend a training course on budgets, lead a campaign, and so on).

YLD (along with Service/Volunteerism and Leadership) has moved to Engagement. YLD, under Stacie Friedman's leadership, and staffed by Lindsay Napchen, will have a clear mandate to massively expand the number of touch-points and goodwill branded events. Make no mistake: YLD participants will be solicited for the annual campaign. But the solicitation process will be smarter and more accommodating. Let's get them in the door first before we ask them for their gift.

The third leadership area we'll continue to look at in the year ahead will be Professional Development. We have to continually renew our commitment to promote, nurture, inspire and protect our colleagues. Not just because we're a Jewish organization, but because it's a message that our community takes care of its professionals. We've got your back.

We need a deeper emphasis on professional skills – courses, seminars, lectures – and on embedding and deepening Jewish values in our workplace. We started taskforces on these two issues, but we may need to re-examine how they work and give them more teeth.

I want us to become an organization that fights to keep its best, motivated staff because everyone else wants to steal them from us. And I want you, our Board members, to look at our professionals and be proud and inspired by us.

A final thought

My colleagues in senior management have heard me refer to a concept that means a lot in our work – **alignment**. Alignment means that everything we do or say in the Federation is oriented around the same core concepts: **we have to be kind, we have to be Jewish, and we have to be passionate about our work.**

We're not going to complete this task. But neither are we free to not start it.

I'm looking forward to the next year and I'm grateful for the trust you've placed in me. I'm going to keep working to make you proud of us.

Dov