

December 10, 2014

18 Kislev 5775

Dear Leslie,

As I reach the hundred-day marker as CEO of our Jewish Federation, I want to share with you some of my thinking about what I've learned, what I've done, and what my plans are for the near-term and long-term future. These past hundred days have been a whirlwind of activity that have shown me the strengths and challenges of our community, and have helped me to map out my thinking on my role and possibilities.

I'm grateful for your friendship, guidance and partnership. There have been numerous occasions in the last three months in which I've looked to you for advice and counsel.

Like 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 these past few months 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 initial learning period.

A. The First Hundred Days

I was fortunate to be able to spend several months this summer in a pre-boarding phase, which allowed me to map out some of the strengths, weaknesses, opportunities and threats from both an individual and organizational perspective.

The pre-boarding time also allowed me to meet with many of the key stakeholders (donors, layleaders, professionals, agency leaders, rabbis) who would otherwise have taken time in the '100 Days' for meetings.

Based on these conversations, and conversations with LCEs and other colleagues, I came up with the following seven priorities for my first hundred days:

1. **Map out the relationships**, portfolios and SWOT for all senior staff, all departments, and internal decision-making processes. For the most part, this was achieved well. I worked hard to meet with all teams, sit with the professionals, learn the work patterns of the different individuals and build impressions of what the SWOT ratios are. Most of the conclusions and ideas in this document emanate from these impressions.
2. **Establish initial contact** and learning with key agencies, synagogues, lay leadership. Show humility, respect and the intent to further cooperate. This was a heavy emphasis, with a clear direction you to make public demonstrations of change and openness. It's been clear these past few weeks that many in the community's leadership have noted the change in direction. We've received some great feedback on the change in atmosphere and respect.
3. **Support Campaign.** (a) Attend, speak at and cultivate relations in campaign events (b) promote the expansion of the donor base (c) lay the ground for Guardians (d) create the framework for event coordination (e) create the framework for missions coordination. This was a heavy emphasis, and was implemented in several stages. I've prioritized the importance of Campaign and my personal commitment to its success.
4. Begin the **rebranding** momentum – kickstart the social media emphasis, reframe the core Federation values (“Care-Build-Save”), energize the messaging, role-model the behavior. Be the storyteller-in-chief. There's a lot more to do here, obviously, but I think this process has started well.
5. Immediate **staff morale-building**. Find easy and fast wins to raise morale and reflect our values (a) taskforces (b) selective individual messaging (c) remove the obstacles (d) role-model the behavior. This was initiated in several areas: multiple meetings with individuals and groups of professionals, deleting the timesheet regime, redesigning the front upstairs lobby in Whippany to include comfortable seating and a TV with Israeli channels, walking around and talking to professionals, several key promotions.
6. **Support the President.** Make sure the ExCom and BOT start a swift and effective transition with (a) storytelling/passion (b) energy (c) effective and meaningful decision-making. Consistent coordination and consultation.
7. Move the SVP into position to gain momentum for the **Strategic Plan** (a) align the players (b) remove the obstacles (c) ensure a holistic and single vision (d) prepare the groundwork to pull all the elements together and get widespread buy-in. More on this below.

Overall, in the first hundred days, I tried to achieve three main areas: implement the above priorities, put out fires, and create quick wins. The number and intensity of fires were both significantly greater than anticipated. Among the fires were:

- (1) Low staff morale – I promoted several key individuals; I made a significant push to walk around several times a day to greet staff and talk with them; I met with many of the professionals individually, and all staff in different departmental and theme groups.
- (2) Low engagement in Union County – disillusion and dissatisfaction from the merger are still evident, and this fact was raised by nearly every layleader from the area. I created a CEO’s office in Scotch Plains, moved Senior Staff and Campaign staff in rotation to the office, held numerous meetings and several parlor meetings in the area, and planned more.
- (3) An immediate need to resolve senior staff placement and competition on invitations. I set a new policy to prevent ‘credit inflation.’
- (4) Engage senior staff. I unified the layers of senior management, and changed the format of senior management team meetings. We spent two days together in a retreat, the first of its kind. The SMT (Senior Management Team) now meets weekly, and grapples with real updates and policy questions.
- (5) Plummeting donor numbers. I created the dashboard concept to ensure that the problem was visually recognizable. I encouraged the rebrand of Super Sunday to a donor thermometer (donors raised, not just dollars) and the ‘12,000 Strong’ concept.

Things that surprised me included the following:

- (1) The vast array of areas that would require attention.
- (2) The significant number of people who would be offended if they didn’t meet with me in the early stages of my transition.
- (3) The number of parallel/competing/overlapping events that require(d) my presence,.

B. Plans for the future

I didn't want to wait for the end of the hundred days to start the planning process. So this document is, in some ways, a transition document. You'll note that several of the issues raised here are already on my agenda. I also felt that some of the issues required immediate attention and resolution.

I'm focusing on several main areas that require the CEO's personal attention and intervention. They're not in any particular order, nor are they equal in significance.

I. Board, ExCom, CEO and Leadership

You have a clear vision of Board and ExCom meetings that are powerful, meaningful and effective places for storytelling, decision-making and inspiration. It's my job to support that vision and ensure its implementation.

In years past the Board and ExCom meetings were dull and uninspiring places. We've already seen a significant change in the culture of these gatherings. I intend to support you in furthering and solidifying this success.

In addition, I'm going to work to widen the culture of storytelling and ownership in several ways:

- (1) I'm going to deepen the involvement of the professional staff in the preparation, presentation and debriefing of Board and ExCom meetings. We've already begun this process, but I think that there's more we can do here, especially in the momentum of storytelling and presentation skills. We should make Board meetings exciting, captivating, passionate and memorable. People should want to come to these meetings because they expect to be inspired and moved by them.
- (2) I'm going to work to solidify the role of the 'event team' around these meetings – Board Liaison, CEO's Assistant, Event Director, all handling the logistics, coordination, timelines. This team is going to take over the All-Staff meetings as well. The All-Staff meetings will have the same emphasis on storytelling, inspiration and meaningful content. I think this will play a major role in boosting staff morale too.
- (3) I'm going to encourage a consistent push to brainstorm on new ideas for presentations and content – folders with stories from our agencies and schools; meetings out of Whippany and in new locations; empowering new layleaders to tell the story; train leaders in public speaking and storytelling, rotating powerpoint slides with event pictures and fliers, etc.

(4) I want to help us reach an LGBTQ policy and guidelines.

(5) I want us to consider a Federation annual Board meeting in Israel in two years' time.

Second, I'm looking at several areas for **leadership development**. In the coming year I'll work to create a professional portfolio responsible for a Leadership Pipeline structure. This will be a single professional, possibly in the Campaign department, who will pull together the following elements:

(1) Wexner-Waldor cohort and other Campaign-related leadership programs.

(2) Mapping out all current leadership opportunities in Federation, in our agencies and, (as a second tier), non-federation agencies, synagogues, schools and institutions. We'll tie the Center for Volunteerism into this.

(3) Mapping out all current layleaders and potential leaders who need to go through 'The Pipeline.'

(4) Creating strategies for referrals, missions, leadership training programs to bring people up through The Pipeline.

Third, **YLD** will be reorganized. I don't envisage having a staffperson in the same format as the past few years;. I think we've been setting these young professionals up for failure.

Instead, I want to set up a process that does the following:

(1) A planning process in which all those who were in YLD/Cabinet positions – even from years past – are invited to think through the role and impact of YLD. Perhaps a full-day retreat.

(2) A solicitation process from donors and (especially) Foundation funds to ensure a 3-5 year separate (from Campaign) 'start-up' program for YLD, so that it won't have to raise funds or think in Campaign terms.

(3) A two or three-person portfolio, with a significant budget for events.

(4) A clear mandate to massively expand the number of touchpoints and goodwill branded events.

The fourth leadership area I'm going to examine will be **Professional Development**. The HR Department must change from seeing itself primarily as a department that protects the organization against employees to one which promotes, nurtures, inspires and protects our employees.

In this light,

- (1) We should promote a solid pension and generous healthcare rights for every professional in the Jewish community from the first day of employment. Not just because we're a Jewish organization, but because it's a message that our community takes care of its professionals. It shouldn't matter whether you work in the federation, one of our agencies, day schools, synagogues. We've got your back.
- (2) We need a deeper emphasis on professional skills – courses, seminars, lectures – and on embedding and deepening Jewish values in our workplace. I'll have taskforce reports on these two issues within a short time and intend to work to implement change in both these areas.
- (3) I'd like to set up an internship program within two years, working with universities and Jewish institutions to have college-age interns working with us in a variety of formats. It'll help us with new creative energies and it'll also be a sign of our commitment to Jewish communal service.
- (4) I'd like to find a permanent mentor/coach on a regular basis. It won't be cheap. But it will be necessary. There's no one I can really discuss issues with on a confidential basis. I think we need to find me someone local who can meet with me on a bimonthly basis to help me.

I want us to become an organization that fights to keep its best, motivated staff, because everyone else wants to steal them from us.

II. Campaign

We have a terrific team of dedicated professionals and layleaders. And every year our campaign is slipping. Even the fact that the Campaign is slipping consistently – in number of donors and dollar amounts – was a revelation when it was finally shown in visual form at the ExCom in September.

The challenge is that we're irrelevant to many in the community. We overemphasize solicitation in the fundraising process at the expense of cultivation and stewardship. We don't build wide relationships. And many of those who do know us, don't like us. Or they like some of our programs without realizing our role in them.

In conversation after conversation these past few months, the same themes have surfaced and resurfaced. There haven't really been many surprises in the responses.

Notwithstanding the need to support the Strategic Plan process in the FRD realm, I'm not yet convinced that the Strategic Plan will be of any major significance in this area (I still think it's worth doing though ... the process itself is important). I don't believe that, for example, shortening the annual campaign cycle will actually make any significant difference in the success of our fundraising. What we need are three things:

- (a) More high-quality fundraisers.
- (b) A culture change to gracious stewardship and passionate solicitation.
- (c) A CEO, President, Campaign Chair and lay leadership willing to take on significant Campaign portfolios of passionate storytelling and solicitation.

With the above in mind, here are the concrete steps that I intend to promote:

- (1) I'm going to 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.
- (2) We should discuss a similar (but smaller-scale) presence in Morris County.
- (3) I'm going to further develop the utilization of the CEO's time effectively for Campaign needs by refining the "Chief of Staff" model.
- (4) I'm going to implement a coherent and compulsory 'moves-management' strategy. The first stage will encompass all Campaign staff and the CEO, and will quickly include Senior Staff, then all other necessary professionals. At a later stage we'll widen the conversation to include lay leadership (with a staffing component to capture and deliver information from/to lay leaders to remove the need for them to use the database).

- (5) I'm going to launch a donor-profile forum – a roundtable discussion for all those concerned to discuss cultivation, solicitation and stewardship policies and ideas on 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 Campaign leadership.
- (6) We're going to deepen and solidify the role of the Events Director and her effectiveness in event management. Within a few months we'll have reached a clear situation in which absolutely no federation events will be planned or programmed without coordination. 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 proactive program of Speakers Bureau initiatives.
- (7) We're going to train fundraisers differently. They'll come with me to CEO site visits. They need to be out of the office more, they need to think about their role differently. We'll need to spend some time on the culture of campaign. They'll learn more about storytelling.
- (8) We're going to examine the effectiveness of shifting to a January-December Annual Campaign, within the next 2.5 years. I suspect that there may be backlash to this from current Campaign leadership, so I'm going to hold off until we can examine best practices.
- (9) Missions will be reorganized and streamlined, and the silos between Campaign, IPC, CRC and others on mission-planning will be removed. All missions will be required to coordinate through a single Missions Director. I'd aim to implement by late 2015.
- (10) Super Sunday will be run by Campaign. It can't be run by Marketing.
- (11) I'm starting a bi-monthly Breakfast series at various diners, starting January. The aim is to raise the public profile of federation in the community, with no solicitations.
- (12) I'm going to work on a cumulative gift recognition policy, so we can find ways to thank long-term donors for their commitment and generosity.

III. Messaging, Marketing and Branding

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

Therefore ...

- i. Our marketing needs to focus on our core values. We are "Federation," or "The Jewish Federation" – not "JFed" - a meaningless term that, at best, confuses and at worse, degrades our branding efforts.
- ii. Our message must include the donors and community leaders in our marketing efforts. We need to highlight our leadership and donors in social media and marketing, making them a focus of our efforts. We are great because our leadership is great. We're great because our donors are great. The website and other media should highlight donors, not attractive stock models. 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. On a frequent basis we should be interviewing our donors, our layleaders, our rabbis, with short videos and creating a library of "The Story of Us" online.
- iii. We need a significant emphasis on storytelling. We need to teach everyone – from the security guards and the assistants to the CFO and the HR Director – how to tell our story. It has to be a simple message: we only do three things – we care, we build, we save. We need to ensure that every person in the federation community understands this and can articulate it. We need to cut through the confusion and clutter with a defined identity that is specific and consistent.
- iv. We need a marketing effort that takes pride in our role in providing PJ Library, Birthright, One Happy Camper, Partnership ... and all the dozens of programs that benefit the community which would not exist without federation. Many people in the community don't even know what we do.
- v. We need an Annual Campaign video and a significant expansion of our social media presence.

Without the right energy and passion at the top of our marketing efforts we'll never move away from where we are right now. Over the coming year I intend to focus on this area and work to help change our culture.

IV. Outreach

We've appointed a 50% position for a Guardians Director. The position will hopefully generate enough revenue and excitement for our work that within three years we can turn this into a full-time position.

I want to create some kind of position for a Rabbi-in-residence. I'll pull some best-practice concepts together and consult with colleagues to see what the options are to present to you.

Synagogue Outreach needs to be branded and deepened. When we have the Institute up and running we'll look at how we brand it and message it. We just need to be careful about how it's presented to the rabbis – they need to be partners in its 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.

All the above, once up and running, will allow us to start a meaningful conversation with the Partnership on roles and branding. I don't think we get a good deal from them, and I don't think they treat us with respect or significance. I think we need to substantially rethink our relationship with them.

VI. Planning, Strategic Planning and External Relations

We have a weak Allocations orientation and there isn't really much planning. Over the last hundred days I've tried to learn some of the issues and map out what I think should be done.

- (1) I've promoted and defined the position of SVP. We'll need to further restructure the professional staffing: what we have now isn't adequate because it's not inspiring and it's too sloppy – it undermines confidence in what we're trying to achieve. We need a thoughtful, strategic and compelling professional team to help pull strategic planning and allocations together.
- (2) I'm going to assist in the streamlining of the Allocations process into the Commissions. It's a critical idea and we should figure out ways to embed other non-P&A departments into the process.
- (3) I'm going to deepen the relations with Agency Presidents and Execs. I'll add JDC/JAFI to their meetings and work to create a parallel structure to work with rabbis and presidents of synagogues.
- (4) I'm going to examine ways to implement a Scorecard initiative within the next three-five years

Israel

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.

But the logic of the partnerships has been opportunistic, and we lack a guiding rationale. There are almost no professional or lay leaders who are able to coherently explain and passionately encapsulate the overall case for our partnerships in Israel in any 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 Negev .. 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) I'm going to work with Amir and his team on building a clear concept of identity for our Israel program. My general recommendation will be to reshape our Israel vision to two themes – **Negba** ('to the Negev') as both a geographic and cultural/Zionist orientation; and **Kedma** ("East" and also with a connotation of both 'forward' and kedem-past, connecting us to thematic areas of civil society, religious pluralism and progress with helping the vulnerable). This would allow us to promote the three southern partnerships, tied in to Ness (see (2) below) and expand the Negev base, while working on a definition of civil society, pluralism and platforming our connections across various locations. But the geographic partnerships would be Negev only, and not Hurfeish, Raanana and Rishon LeZion. That wouldn't mean dropping programs in these three locations. But it would mean no longer calling them partnerships.
- (2) I'm going to work to bring Ness into the Federation's strategic allocations structure. No more separate strategy. It was aligned with Central's strategic orientation. We can push harder once we've moved ahead on (1) above.
- (3) I'm going to aim to increase the number of shlichim. We get great value for what we have, and we can do a lot more with them.
- (4) I'm going to promote a process in which the GMW Campaign, leadership structure and stakeholder vision includes communities in Arad, Ofakim-Merhavim and Erez. If you give a donation in one of our flagship communities, you are 'in' GMW. It shouldn't matter where you live: GMW isn't defined or bounded geographically. I think that if we shape this idea correctly and launch it properly it could be a major defining point for us. We would be the first-ever North American Jewish Federation to claim a constituency in Israel, and stake out real 'membership' there. We'd have to solve (1) above first, or at least move in that direction, but I also think that if framed right, this could be an extremely compelling and exciting vision.
- (5) I'm going to examine ways of creating an ulpan for professional and lay leaders in the Federation.

(Non-Israel) Overseas

We have a tiny number of people in GMW who are passionate about an underdeveloped relationship with a small city, with a shrinking Jewish population, with minimal future growth prospects. Without a meaningful partnership with both a significant city and JDC we'll never increase community passion and connection. We have to rejuvenate the conversation both in terms of a significant partnership, and to 'own' the world.

I think that we need to expand the conversation from Cherkassy to the entire region of Kiev oblast (which is big enough to include Cherkassy as a satellite town). Kiev is a big dynamic Jewish city, growing in size and worthy of a federation of our size. JDC is keen to partner with us on building a new beautiful JCC building there, and there are multiple exciting programs for us to examine. JAFI would probably be thrilled to have us partner with them there too. We would have to confirm with Chicago any next step (since they had a not-significant partnership relationship there some years ago).

In this light we would no longer say that Odessa is a partner community. It cheapens the meaning of partnership to say that this is what we have there. Plus the Tikva home is not the kind of partner we really need. That doesn't mean that we don't support them when needed. And we would certainly find ways to send them funds and directed gifts when feasible. But a partnership is community-based, containing multiple channels, relying on lay and professional leadership vision and commitments.

On the other hand, I'd like to examine a way in which our fourth international partner would be IsrAid. For a small sum (probably \$25k-\$50k) they'd give us naming rights and bragging rights on their activities around the world, especially relating to sending Israelis to humanitarian disaster relief areas. That leveraged sum would mean the GMW logo and banner at all these sites and would significantly help in attracting younger donors and participants.

In addition, we need to utilize further JDC's unique expertise in global storytelling and campaign. Preserving and maintaining core funding, supporting JDC Hunger Relief efforts and – most importantly – assigning three or four GMW senior leaders to the JDC Board in the next three years need to be priorities for us.

New Jersey and CRC

The State Association doesn't 'work' in an effective way. We need a meaningful and useable platform to dialogue with other NJ federations. Over the coming year I'll work with partners to reorganize the structure of the Association so that it's not just focused on (unclearly defined) CRC agendae.

I think that expansion into Somerset/Hunterdon is no longer on the cards, with their new Exec. On the other hand, if Hoboken/Bayonne/Jersey City are 'up for grabs' we should move to discuss their inclusion into our community. I don't think we should allow the current situation to continue, and I think we should – gently – make it clear to the local leadership down the line that we can't continue to fund programs that aren't in our community.

We need to start pulling CRC back to its original core functions of education, advocacy and public engagement. There's too much mission-creep and too much irrelevant busy-work. I'll work to tighten and focus their agenda in the coming year.

VII. Budget and Operations

IT doesn't work. We need a CIO and a clear technology orientation. I'm going to push for further clarity and resolution to help move us forward.

Similarly, our budget is convoluted and unintelligible. We have an irreplaceable CFO who doesn't countenance discussion and doesn't yet completely understand what our direction is going to be. We need a deputy CFO and a clearer budget process, that's respectful to agencies and implements donor intent. I'm going to examine ways of clarifying roles and making the process more intelligible in the coming year.

VIII. Jewish Community Foundation

Over the coming year(s) four key principles are going to guide my relationship with the Foundation:

- (1) The annual campaign of UJA is our primary concern. We can't solicit for Foundation at the expense of the annual campaign. Foundation should be working in partnership with UJA in motivating and inspiring donors for both areas.
- (2) We need to massively expand the number of pro-UJA women involved in JWF and turn JWF into a positive force in the community. The only effective way to do it (it seems) is to create a majority of federation-supporters on their Board.
- (3) No crazies. We don't do business with fringe elements who clearly have far-flung ideas and are wildly disconnected from the community.
- (4) Foundation should increasingly be seen as a resource for emergency funds, special projects, and capacity-builder for programs that benefit the Federation.

A few final thoughts

Time and again over the last hundred days I've heard about surprises. We weren't expecting something to happen, we didn't anticipate such a negative reaction from a donor, or an agency, or some external force. We didn't expect so few young leaders to come to this event. We didn't think that how we invite agency or synagogue leaders to a meeting would be seen as imperious and disrespectful. We didn't think that just emailing layleaders about an event would be seen as irrelevant to their needs.

But good organizations plan for surprises and they build that planning into their long-term thinking.

With that in mind, over the coming months I'm going to develop a concept for a "**Red Team.**" A red team, in military/strategic thinking, is a semi-independent group within the organization that challenges us to improve by continually thinking in alternative/external analyses. In other words, a Red Team would continually think about how a grumpy donor, an unhappy synagogue, a disaffected leader, an alienated agency head, would think about his/her relationship with us. We don't currently have a structure that allows us to think creatively about the impact we have on others (and how to plan for that more thoughtfully). I'm going to create that concept and launch a prototype in the months ahead.

Second, I'm going to increase further my **public presence**. I think that you hired me to be a public inspirer and to connect people to our federation and our community. I intend to find multiple opportunities to bring people in to our fold, and connect them to engagement opportunities. I intend to use my position to be a "storyteller-in-chief" for our federation, while at the same time acting as a role-model, so that others can follow me as storytellers and motivators.

Third, I'm going to start promoting a single concept – **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 hundred days and I'm grateful for the trust you've placed in me. I'm going to keep working to make you proud of me, and of us.