

September 2016

Elul 5776

Dov's Second Anniversary Letter to the Board

Dear Board members,

There I was, just a few weeks ago, on top of a glacial lagoon in the middle of Iceland.

It was beautiful. I was in a small group of hikers, about half of us from the U.S., and half from Europe, enjoying the stunning scenery. Half-way through the hike, we gathered round an array of volcanic rocks, opened up our food and snacks, and the guide got a pot of coffee going. We sat in a circle and each of us told a little about who we are and where we're from.

Sometimes, when I'm with non-Jewish groups, I blur the details about who I am and what I do. Not because I'm trying to hide anything but rather because there are so many words and descriptions in our field that have layers and layers of meaning and context. I've learned that you need to 'unpack' a lot of these words that we take for granted, because they contain all kinds of assumptions and understandings within them.

But this time I didn't.

"I'm the CEO of the Jewish Federation of Greater MetroWest, New Jersey," I said. "My job is to help coordinate and direct the management, organization and execution of a vast array of social, educational, cultural and communal structures and partners for the Jewish community in northern and central New Jersey, in Israel and around the world."

Easy enough, right? But for the next few hours as we continued our hike, everyone was questioning me.

I'm used to polite interest from non-Jewish acquaintances in what we do, but as the questions developed, I realized that the questions basically fell into two types: the Americans were fascinated by the idea of a community taking responsibility for its programs and services; the Europeans were intrigued by the role of a non-governmental organization in a weaker social-democratic welfare system. There was a Korean-American couple who confessed that they were sad that their own community had

nothing like what we have. And everyone was fascinated by my assertion that a strong American Jewish community helps build Israel at the same time that a strong and resilient Israel helps build a strong and proud Jewish community in New Jersey.

At the end of the hike, boarding buses to go back to Reykjavik, one of the hikers – a huge friendly man from the Midwest, patted me on the shoulder and said, “proud of you, man. Wish we had more of what you’re doing.”

And he’s right. Because I want you to stop for a moment, as you read this report, and think about this for a moment: ***name any other organization that does what our Jewish Federation does?***

There are none. Not one.

We have an exclusive brand and an incredible product. No one does what we do, no one else can do what we can do. And this last year we focused on promoting and enhancing that brand and product in our community in new and unprecedented ways, in three main areas:

- (1) We professionalized our work;
- (2) We deepened our reach; and
- (3) We embedded our values.

In this report, summarizing my second year as CEO of our incredible organization, I want to walk you through some highlights in those three areas, focusing on what we’ve achieved, where our challenges were – and are – located, and the path ahead.

Let me stress two important things, before we start:

- (1) *This is my report.* It’s not the President’s report and I don’t mean to undermine her or your role. You hired me to run the professional team and that’s my main focus here in this report.
- (2) *This is my report.* It’s deeply personal and filled with gratitude for the sacred task with which you’ve entrusted me. It’s not the Federation’s annual report, which we’ll be writing shortly.

I’m deeply grateful for Leslie’s leadership and friendship, for her counsel and guidance, and for the support and counsel of so many of you, especially Lori Klinghoffer, Gary Aidekman, Scott Krieger, our Past Presidents and the many lay leaders in our community who inspire and guide me on a regular basis.

One more thing before we get started. We're not the same community that we were two years ago. Lots of federations say this, but few get to actually mean it. But the way we now think about Campaign, Planning and Allocations, evaluating impact, our relationships with our synagogues, our Global Connections, educating in the community ... all are dramatically different from how we explained and executed them just two years ago.

So, with all that in mind, I have three 'big picture' summaries to share with you ...

(1) Professionalizing our work

If we're not the best in town, someone else will come in and capture hearts and minds. And while, on the one hand, we're pluralistic and we believe that the Jewish non-profit sector should be diverse and competitive ... on the other hand we love our Federation and want to make sure it succeeds and thrives. And that means making sure our game is always the best in town. It means making sure that our message and brand and product are the sharpest and most compelling.

How have we done that in the last year? In *converging and learning*.

First, we've *converged* (streamlined and ordered) the main departments of Federation. All of our Campaign, Foundation, Events, Missions, and Outreach & Engagement professionals now report to our Chief Development Officer, Daniel Staffenberg. Our Planning & Allocations, Programs & Services, Impact Evaluation, and Global Connections professionals now report to our Chief Planning Officer, Jessica Mehlman. Rather than have fifteen¹ professionals report directly and indirectly to the CEO, we're now down to a much more manageable number. This new structure not only frees me up to do more of what you need and want me to do (raise funds, direct the overall management strategy, guide the professional team, and remove obstacles), but it also creates whole new levels of opportunity for our professionals to show us what they're capable of achieving.

The second level of convergence is in the hiring of professionals in new positions without imposing additional budget costs. This year, for example, we hired a new full-time Ratner Young Leadership Director (Rena Abrams), a full-time Planning and Allocations Associate (Penny Arons) and a full-time Director of Impact Assessment and Learning (Lauren Silverstein). We've run some one-time evaluations of programs and platforms in the past. But the message that we're committed as an organization to having consistent

built-in evaluation and assessment is a huge statement of progress. It builds in feedback-loops and new ways of thinking. Evaluation and assessment means that we're always trying to improve, we learn from our successes and we're not afraid of change if something isn't initially working.

We haven't had a Planning function in Federation for quite a few years, and I'm proud that this is now up and running, and also that this year the entire Allocations process moved from paper files to an online system. Just as important, we now have four clear criteria for allocations that are simple and precise: “**OVCO.**” Everything we fund (and do) has to be the unique obligation of Federation and the Jewish people. It has to contribute to the vibrancy of our community. It should, where possible, connect us to Israel and the Jewish World. And it has to have tangible outcomes. **OVCO.** If a program doesn't meet these basic criteria, or a combination of them, then we shouldn't continue to fund it just because “this is how we've always done it.”²

This last year we've focused heavily on the *learning* aspect of our work. Healthy, collaborative organizations are first and foremost learning organizations. For far too long we've done the work. But we haven't really learned about it, and we haven't taken the time to occasionally stop, take stock, and learn about who we are and what we're doing, how we do it well, and why we do it. This learning is critical: we need our professionals to know our own product, and the basic building blocks of Federation.

Bonnie Sterling, our HR Director, told me recently that these last two years we've brought on thirty new employees, which is more than we've brought on in the entire period – twelve years – since she joined our professional team. Thirty new people hired in two years – some from attrition, some from new positions being created, some from replacements – means that we have a lot of new learning to do. Even those employees who have been with us for longer than two years have a lot of learning to do – because so much of what we've built is new. By the way, thirty new employees in two years, for an organization of 130 professionals, constitutes a very low turnover rate (11.5% per year). The 2015 Nonprofit Employment Practices Survey³ reported that U.S. nonprofits generally saw a turnover increase from 16% in 2013 to 19% in 2014.

So what does more learning look like?

Last month we ran an all-staff professional learning day. It was the first time we've ever run such a program. The aim of the day, called “Ahead,” was to have every Federation professional on our team learn the elements and programs of what we do. Each department was given twenty minutes to share its vision, plans and strategies, and there

were opportunities for discussion and reflection. Sessions were videotaped for future professional learning, and for onboarding new employees to quickly get ‘up to speed’ on our culture, operations and best practices.

For the first time ever, all of our senior management team are undergoing 360 peer-review processes, coaching and professional training. I’m grateful to the Alan V. Lowenstein Scholarship Fund for generously funding this initiative, and helping us invest in professional excellence.

Our administrative professionals have already begun training courses in database management, and we’re looking to run a series of training courses for them on ‘managing up’ their supervisors. At a later stage, depending on budgets, we’re looking to run some training courses for junior and mid-level managers on basic management skills, appropriate manager behavior, and more.

We’ve also begun a review of our family leave policies, and are moving to examine and compare best practices on employee relations.

(2) Developing and deepening our reach

We can’t continue to be the best-kept secret in the community. I keep noticing these awe-inspiring programs we run, or we fund, or we nurture, and not enough people in the community know about them or know our connection to them.

We’ve done a lot to change this in the last year, with a focused marketing and messaging drive, a revamped Marketing Department under our new Director, Mark Gordon, a deeper emphasis on social media, and a heavier push to teach storytelling.

What has this meant in terms of the professional structure? We’ve made a series of changes in Campaign, including a new Campaign professional leadership, a new Men's Campaign, moves management, new reports, and new office space. We launched an Annual Campaign for Jewish communal professionals. We expanded the Missions Department to a full-time position and Events to a full department last year and solidified their programs. Now, under Stanley Stone, our new JCF Executive Director, Rebecca Pollack, our new Campaign Director, and Daniel Staffenberg, our Chief Development Officer, we’re aligning Foundation with Campaign so that we can achieve a better synergy based on donor needs.

Our Outreach and Engagement Department (OED), under the direction of Amy Biloan, seeks to enhance the connection of Jews in Greater MetroWest to each other, the community and to Federation through inspiring and relevant programs, events and initiatives. Through this strategic effort, we're moving to identify, recruit, train, place and steward the next generations of volunteer leadership for the Greater MetroWest Jewish Community – thereby ensuring a vibrant Jewish community for decades to come.

How? The department has a number of key functions – the Center for Volunteerism, Synagogue Outreach, Young Leadership and Leadership Planning and Placement – that approach this goal from diverse perspectives, thereby meeting the needs of a variety of key constituencies throughout the community. At the foundation of their work is the creation of a culture of “*matterness*” – engaging community members to meet their basic need to be known and acknowledged, and to be meaningful partners in this important work. Matterness means creating experiences that are low-barrier to entry (financially and geographically), that meet the needs and interests of our constituents, and ensure that participants feel that their time is well spent.

And it's working: OED is connecting the previously-unaffiliated to the community and Federation. This year they held 27 events (19 of them completely new to our community – and sometimes the same event being held in two locations!), engaging 949 individuals, of whom 343 had never attended any kind of Federation event before.

In the year ahead, OED is planning to hold 35 events, including September's first-ever Morris County Jewish Festival (which we believe will be “sold out”), with at least 1500 attending, 450 of whom we hope will have never attended a federation event.

We're engaging with our Synagogues in new ways; our Create A Jewish Legacy initiative has changed the face of Legacy development at 21 local agencies and synagogues, our Synagogue Leadership Initiative reached 44 synagogues, and our volunteer center brought hundreds in our community together under the Federation brand.

You know the reasons why we need to continue to develop and deepen this brand. Because the Pew report⁴ in 2013 showed us something that many in North America misread or misunderstood. It wasn't that Millennials and Generation Y'ers don't feel Jewish. They do. They just don't like the traditional offerings that the community presented to them. And the programs and platforms that we were really good at – fundraising for Israel, a sense of obligation to Jewish community life, an institutional concept of space – have become precisely the elements that, time and again, alienate younger people in our community. So instead of banging our heads against a wall and

each time expecting different results, and instead of getting angry with young people and their “selfishness” for not coming to our events and giving money the way that we’ve traditionally raised it – we have to talk to them on their terms and meet them where they are.

You know this already. But that’s the reason why we put so many resources into an Outreach and Engagement Department. And that’s also the reason why a separate agency, our Partnership for Jewish Learning and Life, was merged into our Jewish Federation this year. Talking to people on their terms based on where they are is critical because if we don’t do it now, then in five or ten years we’ll be falling down a deep decline of irrelevance and alienation.

As we further expand the role of Outreach and Engagement, Programs and Services, and Campaign, into Partnership and new content areas, we need to make sure that the single, compelling Federation brand is consistent across everything we offer. We need to make sure that every person who comes to a PJ Library event, or a JTEEN or JTot or Iris Teen event understands that he or she is coming to a Jewish Federation event. We need that single brand out there front and center.⁵

That’s an extremely powerful and necessary message. We’re pretty good at reaching out to our awe-inspiringly impressive major donors and we’re getting better and better at showing them their impact. But there’s a continual nervousness about who will come after them. Rightly so. And many of the remarkable programs we’ve traditionally run, like Young Leadership, Peoplehood, Epstein and Borinsky, along with the powerful newer ones we’ve created – Men’s Campaign, Outreach and Engagement – will work along with the Partnership content to deepen this message.

One of the keys to success in deepening the impact of this message will be to make sure that we’re all using the same concepts of ‘moves management.’ Partnership’s database is being integrated into the main Federation system so that everyone who comes to content provided by Partnership is part of the overall Federation system; Federation attendees will be connected to new and ongoing opportunities to enhance their Jewish journeys. There have been too many examples of missed opportunities in the past to connect our community members, but we can’t afford to lose these people anymore.

We’re managing other moves too, literally. Some sixty of my colleagues are moving their office space in the coming months in the Aidekman Campus. Our goal is to ‘walk the walk’ of the merger with the Partnership. It’s not enough to say that ‘they’re with us’ – they need to be among us. In the coming weeks, and thanks to the creative minds of our

Senior Management Team, the Partnership, Outreach and Engagement, and the core of our Global Connections professionals will be working shoulder-to-shoulder. Other creative space moves are planned in addition. Taken together, these moves will create more synergy, more energy, more collaboration and more success.

Our Federation does three things – you know these – *we care, we build, and we save*. That’s what we do. It sounds obvious now, but it was a novel concept when we launched it two years ago. The hashtag #IamGMW. The emphasis that we call ourselves “Federation” or the “Jewish Federation” not ‘JFED’ or ‘jfedgmw,’ which aren’t intelligible outside of our core group. We’re working on FAQs, a style guide, a greater emphasis on storytelling, public speaking and outreach in the community.

Have we done enough? I don’t think so. But we will. Because the idea, above all, is to have an aligned messaging effort that takes pride in all our agencies, programs and platforms. Everything we do is part of a single rational whole.

In that context, you can understand why we completely restructured our Israel and Overseas program platforms last year. The basic aim was very simple: there were very few people in the community who could have competently and adequately explained to you what exactly our Federation did in Israel and around the world. We had incredibly impressive lists of amazing achievements and programs. But you couldn’t explain them in a passionate and engaging way to anyone new. You couldn’t “sell” the work of Federation that way. Under the leadership of Paula Saginaw, Amir Shacham and Sandy Green we’ve come a long way and I’m confident that we’re heading in the right direction.⁶

The fact that we were the first Jewish Federation – ever, anywhere – to have a Super Sunday site in Israel this year, where we raised funds, from Israelis, for the UJA Annual Campaign, is – I think – one of the most incredible things we’ve done this year. One of many incredible things: to have the largest cohort of shlichim in any American Jewish Federation is a major point of pride for us. To have Israeli television playing in our lobby, to have the first-ever multi-city Partnership P2G “Negba” program. To have sent 141 participants on 11 missions and 10 day trip participants to Israel last year alone, including our first-ever “CEO’s mission” with the support of the Lautenberg Family. All these and a lot more tell me that we have a really bright future ahead of us in Global Connections and our work in general.

(3) Showing our values

We continued to examine and develop ways to deepen our culture. Did we get everything right? No. But as I've told our professionals again and again, that's ok. We can make mistakes along the way. I celebrate those mistakes and so should you, our Board members. It's a sign that we're willing to take risks, to innovate, to be creative.⁷ If we continue to do the same thing every year, in the same way, without learning and without questioning, then everything keeps going down an uninspiring cycle of sameness. We can't afford to do that. We have to be the most engaging and inspiring game in town.

How does Federation's workspace reflect our culture and values? In questions like:

- How are we investing in talent (like most other for-profit and non-profit organizations)?
- How are we motivating, inspiring and promoting our professionals?
- How Jewish are we, how do we treat each other, how respectful, appropriate, how meaningful is our behavior and the work we do?

Our professionals spend a lot of time together, so that time should be meaningful and inspiring and positive.⁸ We deserve to have good policies and understanding for how to bring in more people with special needs, more interfaith families, and more LGBTQs.

We have to thicken the professional pipeline – stabilizing and widening our talent pool. I've had a number of fascinating conversations with "Leading Edge," formerly the Jewish Leadership Pipeline Alliance, and was honored to be selected as a member of the first cohort of their CEO Onboarding Program this year.⁹ Some of the issues I've been learning on the Program directly focus on the values of the workplace and how to expand the professional pipeline. Here's the bottom line: the one thing I've learned from Leading Edge, from my colleagues in other Jewish Federations, from my peers and those I respect, is this: *organizational development is a process, not a destination, and this process is about evolution, not perfection.* Every organization, no matter how great, can improve its workplace culture.

We can do this. One of the elements I've emphasized in the past year has been the creation of 'stretch assignments' for personal-professional growth. Time and again this past year we've taken some of our professionals and given them new and challenging assignments that previously would have been rated as beyond their current knowledge or skills. And time and again we saw that, with good guidance and support, they come up winners.¹⁰

Here are a few highlights based on what we know from Leading Edge's survey of thousands of Jewish communal professionals in 55 Jewish organizations, including Jewish federations, JCCs, foundations, religious movements, educational institutions, youth organizations, social justice groups, and social welfare organizations:¹¹

- (1) 86% of employees in Jewish organizations are motivated by mission. They feel connected to the organization's mission and they understand how their work contributes to its fulfillment. That doesn't necessarily lead to personal satisfaction in the workplace, but it shows you the quality and commitment of our Jewish communal professionals. Since we rebranded our mission statement two years ago – *we care, we build, we save* – and we continually reinforce the messaging of this mission in our branding and marketing, you can be well-assured that every professional can articulate the basic building-blocks of who we are and why we do this work.

- (2) Like every other Jewish organization, we need to continually strive for more professionalism and better management practice. In the last two years we've implemented full annual reviews for every individual professional – for the first time, standardized and compulsory. Everyone deserves an annual review; I want you to know that I read every single employee review once it's completed. But here's the really interesting point: **88%** of respondents in Jewish organizations feel respected and recognized in their workplaces (this is ten points above the general industry average). We have to build on this goodwill so that we're not just saying '*yasher koach*' for every job done well or not-so-well, but rather that we're able to have meaningful, honest and sometimes difficult conversations when needed. Good, honest and useful feedback is one of the most useful tools we can deploy in improving our professionalism.

- (3) We didn't give cost-of-living or salary raises this year and I want to do more to help improve this situation. This work is demanding, exhausting and captivating. You should be proud of the fact that our professionals want to make a difference, they work long and hard to have the impact that our Board wants to see. That doesn't mean that they don't deserve good compensation; it does mean that

spending good money on our people and what they do is an investment in quality and excellence.¹²

- (4) Here's where you, our Board members, come in. Leadership matters. A lot. And confidence in leadership is key to retention. Employees who plan to stay in our sector do so because, overwhelmingly, they have confidence in their lay and professional leaders. These faithful employees cite leaders' abilities to create a culture of open communication and regular feedback on performance, a clear and promising sense of organizational direction, and a greater ability to contribute to it. As a result, they feel more engaged and better enabled to do their best work.

The above points are extrapolated from our conversations and my own learning with Leading Edge. I've discussed these findings with my colleagues in other Federations, and we're negotiating to bring Leading Edge to our Federation this year to scale up an employee engagement survey and to benefit from significant organizational consulting to improve our workplace patterns. I share their view that "great places to work actively support staff to do their very best. They hone employees' skills, strengths and interests, maximizing their potential. Studies show that a strategic approach to talent management and an overall commitment to workplace culture have clear benefits, namely a greater level of employee engagement which leads to a significantly lower turnover rate, and higher productivity that better enables organizations to achieve their goals."¹³

Mort Mandel puts it even more clearly when asked what an organization needs to look like to attract what he (and we) call 'A players':

1. We have to pay attractive (but not unreasonable) salaries.
2. We have to create an attractive work environment – "where people are treated with respect and where there are agreed-on values that ensure high integrity and generosity toward one another."
3. We become a professional meritocracy, "where excellent performance is identified and rewarded, and there is a commitment to professional growth on the job."
4. And finally, we continue to deepen the meaningful symbolic and positive gestures and moves that show how much we think of, and care for, our professionals.¹⁴

We've done a lot to move in these directions. And there's a lot more we can do there too. And we will.

No one else has the traction, capacity and aspiration to care for our community, build its strengths and capacity, and save the world. One person at a time.

No one else can do it.

I've been reminded of that fact almost on a daily basis these past two years. There have been things that have surprised, even shocked me, and things that have amazed and inspired me.¹⁵ It's a sacred task. And I'm grateful for your trust in me and in us.

We're going to continue to work to make you proud of us in 5777.

¹ You read that right. Not a typo.

² For more on OVCO, see <https://www.ifedgmw.org/the-corridor/ovco>

³ <http://www.nonprofithr.com/wp-content/uploads/2015/02/2015-Nonprofit-Employment-Practices-Survey-Results-1.pdf>

⁴ For the full report, see <http://www.pewforum.org/2013/10/01/jewish-american-beliefs-attitudes-culture-survey/>
For a good summary, see Len Saxe's overview at https://www.synagoguecouncil.org/sites/default/files/uploaded_documents/pew.take-aways.saxe_.111213.pdf

⁵ Don't get me wrong. We don't need to fundraise from the participants right away. For the most part, the majority of those coming to these kinds of Partnership programs aren't going to be major donors to Federation. Many of them won't even be donors at all to us in the near future. But until now we haven't had any substantial dialogue or meaningful connection to them. We don't need to raise money right now from the young families. But we do need to connect them to everything else we do as a federated community.

⁶ There's a good summary of the plan here: <http://njewishnews.com/article/28792/new-branding-restructuring-for-federations-global-arms#.V9CHTfkrKM8>

⁷ Take a look at how we started talking about 'failing upward' here: <https://www.ifedgmw.org/the-corridor/we-failed>

⁸ And fun. There, I said it.

⁹ You can read about the course here <http://leadingedge.org/wp-content/uploads/2016/03/ceo-onboarding-cohort-announcement-march22.pdf> and read an article that I wrote about the course with a colleague from the San Francisco CRC here <http://ejewishphilanthropy.com/ceo-onboarding-an-investment-in-the-jewish-future/>

¹⁰ Much of my learning on stretch assignments has come from my coaches, and from the outstanding book by Morton Mandel, It's All About Who You Hire, How They Lead, (Jossey-Bass, 2013).

¹¹ Adapted from <http://leadingedge.org/leading-places-work/>

¹² This is what you need to watch right now: <https://www.youtube.com/watch?v=bfAzi6D5FpM>

¹³ <http://leadingedge.org/jewish-organizations-great-places-work/>

¹⁴ See Mandel, op.cit., pp.17-18.

¹⁵ There were only a few of the former and quite a lot of the latter, FYI.