



Strategic Planning Initiative

Prepared March 2020 by



EXECUTIVE SUMMARY INTRODUCTION

The Jewish Federation of the Berkshires recognizes the value of long-range planning in fulfilling its mission and serving the community. In particular, it is committed to sustaining and strengthening Jewish community, caring for those in need, and nurturing a Jewish future by focusing on related challenges and opportunities.

Strategic planning is an essential step in achieving that focus, a periodic activity designed to set priorities, concentrate energy and resources, and ensure that leaders are working toward common goals. Effective strategic planning can be a critical management and governance tool to articulate where an organization is going and identify what needed actions to progress. It also provides a process to determine success.

In developing a strategic plan, the Federation sought to:

- Affirm its mission and its core values.
- Understand the community's needs, concerns, and ideas.
- Frankly and openly discuss challenges the Federation must address, including changing demographics and finding ways to sustain support for programs.
- Identify key opportunities for addressing organizational challenges affecting programming, development, internal operations, and community relations.

A Strategic Planning Committee was formed to initiate the planning process. This committee consisted of 17 representatives from the board, senior leadership, and a diverse group of community members. Plans were made to gain input and feedback by facilitating retreats, hosting town halls and focus groups, interviewing individual stakeholders, and conducting a community-wide online survey. There were 250 in-person interactions and more than 500 survey responses. In addition, Rainmaker, the Federation's strategic planning consultants, regularly communicated with the Federation to coordinate meetings, identify challenges, review agendas and meeting notes, and provide ongoing feedback.

The input gained from interactions with stakeholders, constituents, and donors reveals a high level of trust and confidence in the Jewish Federation of the Berkshires. The data obtained from these interactions is detailed under Key Learnings. It is both instructive and critical to future planning, but so too are several socio-economic and geographical factors that deserve serious consideration.

Among them are changes in the very structure of the Jewish family. What was once considered a “typical home” of two adults and two or more children now accounts for only 15% of the Jewish population. The most common Jewish household consists of one adult living alone. Within households that appear structurally intact, we see profound internal changes.

In addition, there is consensus that the Jewish communal world has experienced many significant changes during the past few decades. Membership in formal organizations has decreased annually. Contributions to Jewish federations across the country have generally declined, and participation in their formal events has diminished¹. The Jewish Federation of the Berkshires has been one of the rare exceptions to these trends. Federation events are well attended and financial support has been growing steadily.

Decreases in gifts and participation experienced by other federations do not necessarily reflect a diminished interest in Jewish spirituality or cultural connection. There are indications that interest in informal Jewish communal experiences is growing. Typically, many Jewish federations have begun to emphasize the ethnic and cultural, non-religious expressions of Judaism and reinforce the Jewish community’s tradition of charitable giving as a part of an approach to social action.

In the past, Jewish philanthropy in the U.S. has focused on Jewish communal organizations such as federations that distribute funds to causes in the U.S. and abroad. But federations are not exempt from the philanthropic sea change that is shifting donations away from such intermediaries. Although support for Jewish community remains strong, the methods and emphasis for contributing are changing. Jewish charitable giving and philanthropic behavior are still seen as a way to express Jewish identity, and tzedakah remains a core value. The Jewish Federation of the Berkshires faces some of the same issues as other federations and Jewish organizations in North America. As with other communities, the role and relevance of affiliating with Jewish organizations have changed along with the pattern in which people give. However, the JFB continues to meet or exceed yearly campaign target numbers.

Each of these factors is important, but perhaps the most important is Berkshire County itself. It is a tourist destination for people living mainly in the Northeast (i.e., New York, Connecticut and Eastern Massachusetts). The area is characterized by a disproportionately high percentage of part-time residents who fuel the area’s economy in the summer months, attending cultural activities and enjoying the region’s outdoor recreation. Unlike other communities, Berkshire towns vary widely socio-economically. The area is filled with financially independent and active retirees, many of whom are seasonal residents with second homes.

In the Berkshires, a demographic shift was well under way in 2012, with the number of adults over 65 continuing to increase and the number of children continuing to decline. This pattern is now occurring in North America, where by 2030, people over 65 will outnumber those under 18 years of age². Berkshire County saw a decline of 13% in school enrollment since 2010. Another drop

¹ In Robert Putnam’s book *Bowling Alone* (2000) he noted the general decrease in US participation in our local and regional communities. Based on interviews and studies of more than half a million people, it was clear that although Americans are doing many of the same activities as before, we are not doing them communally. For example, more people are bowling, but fewer are members of leagues or teams. We sign fewer petitions, know less about our neighbors, meet with people socially less often, and engage in fewer community activities.

² The national trend is that Baby Boomers began turning 65 in 2011, and every day for the next 20 years 10,000 Americans will celebrate their 65th birthday.³ Already one in three Americans is aged 50 or older; by 2030, one in five will be over the age of 65.

of 16% is anticipated over the next decade³. With some exceptions, there has been a notable absence of young families moving to the Berkshires and a growing number of people in the area who are considered “middle-aged.” This shift appears to be a permanent trend in Berkshire County.

Additionally, with this significant shift in demographics, Jewish religious schools in Berkshire County have experienced a more dramatic drop in enrollment than the county’s public schools. Religious school enrollment in the Berkshires declined by 50% over the last ten years.

In many ways, the Jewish Federation of the Berkshires is a unique organization among its peers. It serves a small, rural Jewish community that is geographically dispersed over a large area. As a result, Berkshire Jewish Community lacks a critical mass among specific constituencies such as teens and young adults. The Federation provides many direct services for the community, filling gaps that may be served in larger communities by more established organizations (e.g., Jewish Family Services, Jewish Day School, JCC”).)

As indicated previously, the Jewish Federation of the Berkshires is a trusted and respected organization, and it will focus on the Key Recommendations to maximize its effectiveness in the years ahead.

KEY RECOMMENDATIONS

The Strategic Planning Task Force identified several key ideas that will serve as the focus of its work in the next three to five years that seek to build upon its work in the community. **We affirm our leadership in all of the urgently held organizational roles** and will continue to be a:

Convener for the local Jewish community;

Funder of local Jewish organizations and Israel programs;

Community Connector across all of Berkshire County; and

Direct Service Provider

There are nuanced steps that have emerged from this process that, if implemented, would enable the Federation to build upon the firm foundation and achieve greater inclusivity and effectiveness in carrying out its mission. They include:

Recommendation #1: Expand Community Outreach and Engagement

A key finding of the planning process is the understanding that “unaffiliated does not mean uninterested.” The Jewish Federation of the Berkshires needs to create opportunities for all who are interested to engage, including those who want to participate in Jewish community or even curate their own sense of Jewish community, but not necessarily in a formal institutional setting. In keeping with the commitment to “meet people where they are” in their Jewish journey, the

³ Berkshire County Public School Enrollment Projections Version 2018, Berkshire Regional Planning Commission February 1, 2018

Federation will expand its outreach to all members of the community throughout the region and actively partner with local organizations to connect with the unaffiliated and under-engaged.

Recommended Strategies:

- Develop opportunities for mid-life demographic (40-65), including “Empty Nesters,” single individuals, and those seeking meaningful experiences and Jewish community apart from their roles as parents.
- Expand opportunities to engage and welcome interfaith individuals, couples, and families, especially those with young children.
- Identify and implement opportunities to bring Jewish connection and learning to people where they are and where they choose to be in the broader community.
- Expand opportunities for Jewish connection for individuals living in nursing homes and assisted living facilities.
- Provide creative opportunities for people to gather informally outside of affiliation to build smaller communities of connection around shared interests.

Recommendation #2: Strengthen Existing Programming and Organizational Capacity

The Federation has a solid reputation for organizational excellence in the community. Feedback from respondents in focus groups, the community survey, town hall, and interviews pointed to strong satisfaction with existing programming, as well as strong executive leadership, staff competence, and exceptional customer service. Several noted with admiration that “the Jewish Federation of the Berkshires does a lot with a little.” At the same time, there are limits to the organization’s capabilities and capacity, and there is a need to increase its effectiveness with many staff only working part-time. We propose to build upon these strengths and increase the ability of the Federation to implement existing programs more effectively.

Recommended Strategies:

- Expand existing family programming and foster at-home experiences for young families to help them connect early to Jewish life and to each other.
- Better promote Jewish day/overnight camp and Israel travel/study experiences to families and educate on existing resources to support participation.
- Strengthen the current network of older adult care and social services and market those services to the community in a more comprehensive way.
- Leverage Federation’s online communications and social media to better connect people to all the Jewish happenings in the community.
- Identify optimal method(s) for supporting formal Jewish education for youth in the community.
- Evaluate staffing configuration and professional development needs in light of achieving strategic goals.

Recommendation #3: Increase the Number of Donors and Total Dollars Raised to Support Federation’s Programs and Services

The Jewish philanthropic world faces challenges as donors today want more choice and directed giving. Fewer funds are being channeled towards Jewish causes despite the needs being greater than ever. Concurrently, the strategic planning process revealed that many community members have a strong affinity with the organization as donors, including their responsibility to support the Federation where they live. Several people noted that they deeply appreciate the “laid back” nature of the Berkshires and that the Federation's approach to fundraising reflects this culture. It was also noted that support for the Federation has been changing. During recent years, the *number* of donors has been decreasing, but the *amount* raised from major donations – especially those from part-time residents – is increasing. In addition, Super Sunday, one of the key elements of Federation’s annual campaign – may have outlived its vibrancy and may need to be *refreshed* or *replaced*.

Recommended Strategies:

- Re-evaluate Super Sunday as our launch model and explore newer modes of giving such as multi-year giving, monthly giving, online pledges, mobile giving and crowdsourcing.
- Offer designated buckets of giving such as (1) Jewish Care Program (older adults and social services), (2) Strengthening Community, (3) Building Jewish Identity (PJ Library, Jewish Education, Youth Programming and Scholarship), (4) Israel & Afula Gilboa Partnership, (5) Humanitarian Overseas Support.
- Expand engagement with second homeowners – using the peer-to-peer parlor meeting model of introducing Federation to second homeowners and cultivating the new relationships that develop.
- Strengthen the overall Culture of Philanthropy of the organization, including providing a role for and professional development for staff, board, and volunteers to serve as active advocates of the organization with donors (prospecting, cultivating, soliciting, stewarding).
- Develop a collection of stories that illustrate the outcomes and impact of our work based on the SUCCESS model (Simple, Unexpected, Concrete, Credible, Emotional, Short Stories).
- Re-emphasize the Legacy program as a means to make lifetime gifts through a targeted, integrated ask focused on full-time residents with demonstrated lifetime giving and long-time second homeowners.

Recommendation #4: Develop New Leaders, Expand the Number of Volunteers and Provide Leadership Training for the Federation and other Jewish Community Organizations.

The Federation and other Jewish community organizations struggle to identify, recruit, and train sufficient volunteers for their boards, committees, and programs. Younger individuals, in particular, are busier than ever with work, family, and social obligations. To sustain our community, strong leaders and younger leaders are needed.

Recommended Strategies:

- Offer joint training(s) for current leadership around topics that might include: Board Governance, Board Succession, Financial Oversight, Fundraising, Marketing &

Communications, Community Collaborations, Engagement, Legacy Giving, Feeding the Volunteer Pipeline.

- Establish a signature community leadership program/fellowship with an equal focus on personal and organizational leadership skills that will have relevance and value for participant's personal careers and communal service.
- Create a plan to formally and publicly recognize volunteer leaders and their contributions to the Jewish community.

NEXT STEPS

Each of the strategies should be translated into concrete implementation steps that identify:

- Key resources needed to undertake the strategy
- Clear assignments to responsibly lead and support the effort (Champion, Allies)
- The timeline for implementation
- The metrics that will determine whether or not an objective has been achieved
- The party or parties that must approve decisions and those that must be informed of them
- The implementation status (Pending, In Progress, Ongoing, Completed, Deferred, etc.)

The plan, by design, identifies priorities and recommended strategies for the next three to five years. This work can begin immediately upon adoption of the proposed strategies and initial tactics. We expect that they will evolve over time as the Federation learns from initial experiences and refines its approaches, especially in relation to engaging new communities and piloting new initiatives. The board should establish a process for reviewing the proposed work, delineating roles and responsibilities for undertaking the work and monitoring its progress on an ongoing basis.

KEY LEARNINGS

Connection with Jewish Community

- Jewish content *matters*, and we wish to increase its presence in our programming and events.
- Genuine connection is the key to generating a welcoming environment; we have seen strength in smaller affinity groups and low barrier/informal opportunities to engage.
- We must value people's value to the community apart from their financial contribution.
- Younger Jews are more transactional than tribal; social activism motivates young people.
- 46% of respondents indicated that they have a very strong connection to the Federation
- The majority of respondents indicated some level of observance of Jewish ritual; families with children indicated 89% light Hanukkah candles. Only 11% indicated that they regularly Keep the Shabbat. The majority indicate that they identify as Conservative or Reform.
- Our work can only be effective in collaboration and partnership with our community.
- Full-time residency (60%) and Part-time residency (40%) of respondents have not changed significantly over the past several years
- Some residents of nearby states (CT, NY, VT) have close connections to the Federation of the Berkshires and identify this as their primary Federation

- The majority of respondents are married; the age of the community skews to seniors (65+)
- In the majority of survey respondent homes, both partners are Jewish (82%)

Organizational Capacity

- The return on investment (ROI) in relation to programming is high (i.e., the Federation spends relatively little and has high-impact programming).
- The majority of respondents indicated that they believe the Federation is meeting the community's needs (70%). Twenty-two percent (22% of respondents were neutral on this question).
- Most believe that Federation programs are of high quality (70%). In keeping with those who were Neutral in program evaluation, 22% were “Neutral” on this question as well.
- On the question of social services effectiveness, more than 50% were “Neutral” on this question.
- More than 85% of respondents indicated that the Federation fulfills a critical role in the community. Only a single respondent indicated that they Disagree.
- Identified Federation/Berk community strengths include:
 - The Executive Director – respected, effective, thoughtful, open to listening. One individual noted, “Do everything you can to keep her!”
 - Donate because it’s part of our responsibility as part of the Jewish community
 - Respectful about not ‘poaching’ each other’s members – do not provide services to unaffiliated households
 - Support of religious education
 - Camp scholarships
 - Convener of various constituencies
 - Social Services – need to expand, help a wider range of people
 - Senior lunches – very valuable, especially the social and programming aspect
 - Community celebrations and observances
 - Role in the secular community – ADL program
 - The grant allocation process
 - Lifeline outside of our own house of worship
 - The small size of the community makes us nimble – there is limited bureaucracy
 - There is a strong focus on congregations
 - Meals on Wheels - Kosher meals reaching Jewish peoples vs. senior lunch where attendees are less Jewish. This is highly consistent with our organizational values

Fundraising

- The board and volunteers may have limited experience with fundraising; in addition, they may have a limited understanding of the range of Federation programs and services. This knowledge is key to engaging staff and board in cultivating, enrolling, and stewarding donors. Our research found that more education and much clearer messaging are needed for the board, our solicitors, and our community (e.g., telling our stories).
- There are opportunities to substantially increase stewardship among board members and genuinely detach “thanking” and “solicitation.” This activity can be beneficial in re-engaging lapsed donors, maintaining a connection to Legacy partners, and those seeking to increase their giving to Federation.

- There may be an opportunity to increase fundraising capacity building among our partners, especially smaller ones, through community-wide training and structural support.
- More than 50% of households that responded have a collective income of \$100,000+ and more than 57% of them are Comfortable or Very Comfortable that they will retire at their current income level
- Programs were generally equally weighted for support, indicating no strong preferences. They were also generally favorably reviewed (see Open-Ended Responses)
- Several people indicated the need to reach Teens and Young Adults; this is reflected in Open-Ended responses as well.
- There is strong support for camperships, teen trips to Israel
- The Berkshire Jewish Voice has been noted as an effective communication tool, with 68% ranking it as “Excellent” and another 18% as “Good.”
- More than 47% of respondents indicated that they are satisfied with their level of participation. Among those who would like to participate more, they indicated the following challenges (duplicating – could choose all that apply):
 - Don’t have time (30.1%)
 - Programs don’t interest me (9.3%)
 - Don’t feel connected with people in attendance (13.8%)
 - Don’t have transportation (5%)
 - Proximity of programs – too far from me (14.5%)
 - Other (12.5%)
- The majority of respondents indicated that they had provided financial support to the Federation (86%)
- The majority of respondents (63%) give to both Jewish and non-Jewish causes. Only 2.3% give exclusively to Jewish organizations.
- Top reasons for giving to Federation include:
 - Want to help create a vibrant Jewish life in the Berkshires (72%)
 - I value the overarching support of the Jewish community (68%)
 - I want to help ensure the future for Jewish young people (66%)
 - I believe I have an obligation to help fellow Jews (68%)
 - I believe that the Federation knows best how to allocate resources (52%)
- Top reasons for NOT making a gift to Federation of the Berkshires include:
 - Other (37%)
 - I prefer to make a contribution to other nonprofits in the Berkshires (27%)
 - I was never asked to contribute (16%)
 - I am only in the Berkshires a short time (18%)
 - I make a gift to another Federation (16%)
- People have a very favorable understanding of the impact of their gift and they feel appreciated. They believe that their gift makes a difference in the community.
- Areas of improvement include: Telling stories of impact, more frequent communication, and ensuring that constituent feedback is incorporated into decision-making (and evident to those submitting the feedback).
- The vast majority of individuals indicated that they were not interested in making a legacy gift to the Federation (67%), and less than 10% have indicated making a gift or a willingness to make one (2.6%)
- The majority of respondents indicated their preference was to receive solicitations from the Federation via mail or email.

- The majority of respondents think that the Federation is effectively fulfilling its mission (81%)
- The majority of respondents believe that their investment in the Federation is worthwhile (83%)

Open Response Suggestions for Improvement

- Wish programming could rotate – knowing that KI has a kosher kitchen means most of the programming happens there, have congregations co-host events that happen at KI.
- Communicate better with the entire community – the presidents and rabbis are not always able to communicate what is happening - the Federation can communicate directly with congregants, maybe board members work on ‘spreading the word’ about the Federation more.
- Programs that are not just Jewish (e.g. immigration). We don’t always need a direct Jewish connection to promote community awareness
- Use Federation email list to advertise affiliate programs. (Note: This is already happening – some may not be aware of existing outreach).
- Federation should connect to all congregational events, even if they are not a sponsor
- Increased social media presence – interactive FB groups, PJ Library connector in South County
- Affiliation issues: Think outside the box! Federation can help with ways to allow people to come in and out of congregation life. For example, a community umbrella membership or support for informal engagement.
- Find other ways to engage people – ad hoc committees – “brain teams” “solutions committee”, sub-committee work that does not involve year/s long commitment
- Critical to have interfaith voices at that table
- Increase “Rabbi without walls” –
- Increase outreach to seniors – value aging in community
- Deeper support of synagogues. They don’t need more programming, but they do need fundamentals and operational support.
- How can we increase participation of PJ Library families in formal Jewish life and Federation support?
- Share data on unaffiliated families with congregations – PJ Library, non-affiliates may not know what they are passing up and Federation can be the ‘next step.’
- Face of Jewish community is changing. The way we talk about being Jewish is expanding – language has to shift – ‘strong interfaith families’ need to make sure the message is that all are welcome.