

JFGN. STRATEGIC PLAN 2022 - 2027

- Vision:** The Jewish Federation of Greater Naples aspires to be the central communal voice for the Jewish community of Greater Naples and the supportive thread that runs through the fabric of the Jewish community, its organizations and services, connecting all.
- Mission:** To enhance and enrich the quality of Jewish life by recognizing and supporting the charitable, educational, humanitarian and social service needs of the Jewish community locally, nationally, overseas and in the State of Israel.

BACKGROUND

The Jewish Federation of Greater Naples (the Federation) is a tax-exempt, 501(c)(3) charitable organization that is at the center for Jewish community of Greater Naples and local Jewish philanthropy.

The Federation creates a sense of community for thousands of Jewish residents in Greater Naples by creating and supporting programs to further Jewish learning, identity, pride, culture and Jewish continuity.

The Federation also supports programs for Jewish people in need in Greater Naples, Israel and throughout the world, providing food for the hungry and counseling for the troubled, supporting rescue and relief efforts for isolated Jews in distressed regions, and funding innovative Jewish educational and unity initiatives.

At this time, the Federation leases 4,000 square feet in North Naples, which it has outgrown due to the popularity of the Federation and its key affiliated partners' numerous programs and activities. Over the past few years, the Federation has negotiated a multi-year land lease with Temple Shalom and is currently constructing a 18,000 square foot multi-purpose building that is expected to be completed later in 2022. The Federation's Board of Directors, volunteers and staff have thus far successfully raised \$13 million towards its \$15 million capital campaign goal.

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Prepared by The Williams Consulting Group, LLC

Strategic Objectives for the Jewish Federation of Greater Naples

The Board of Directors enthusiastically identified their collective vision for the Federation over the next 5-10 years as follows:

- Central address and the central communal voice of Jewish community and identity
 - Successful recruitment of Jewish community bridging generations, especially those aged 45-65—where all gather, learn, play and celebrate their Jewish identity together
 - Highly regarded and respected organization known for cooperation and collaboration amongst all Jewish organizations
 - Aspirational organization that attracts people to join and enjoys enriched programming year-round while maintaining our 'Hamish' welcoming feeling
 - Expanded breadth and scope including all areas of Collier County as well as Southern Lee County and dialogues with Protestants, Catholics, Evangelicals and Muslim communities
- Strong and effective volunteer and staff leadership
 - Energized, strong and prestigious Board of Directors with more active, working committees
 - Leadership team (Executive Committee and CEO) along with staff consistently exceed Federation's goals and objectives thereby successfully growing the organization
- Financial sustainability
 - Increased annual campaign reaching \$4+ million/year by 2032
 - Endowment fund growing over 10-15 years to cover annual operational expenses (\$10+ million)
 - Fully funded replacement reserve fund
- Vibrant and cohesive Jewish population
 - 12,000 or more Jews in Greater Naples
 - Safe and secure Jewish community
 - Jewish population growing at 5% or more annually

The Board of Directors dedicated time to consider that their vision would only be fulfilled if the Board was determined, diligent, innovative and constantly vigilant to seize opportunities and overcome challenges. With this in mind, the Board of Directors agreed on the following five strategic initiatives and specifically identified the goals with tactics, metrics, responsible parties and timelines. Going forward, the Board will regularly monitor its progress, revise as needed, and address issues promptly.

STRATEGIC INITIATIVES (2022 - 2027)

1. **Ensure financial sustainability** with effective donor development and financial resource development to secure long-term fiscal strength
2. **Enhance programming, relevancy and engagement** striving to attract seasonal and year-round participation
3. **Increase outreach, community awareness and visibility** to both Jewish and non-Jewish communities
4. **Recruit, develop and engage effective and capable leadership** (staff and volunteer) to meet current and growing fundraising, administrative and programming needs
5. **Develop and implement a comprehensive strategy for maximizing the utilization** of the Nina Iser Jewish Cultural Center (NIJCC) and its impact on the Naples area Jewish community

GOALS and TACTICS

1. **Ensure financial sustainability** with effective donor stewardship and financial resource development to secure long-term fiscal strength

Goals:

1. Promote increased Board commitment, involvement and active participation in the Annual Campaign
2. Increase funds raised by Annual Campaign year over year by 6% to adequately address increased needs and expenses
3. Develop revenue streams to monetize new Federation facility usage to offset increased operational expenses
4. Identify strategy for additional funding sources such as corporate and grantors; develop plan and implement

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5. Evaluate allocations policy and revise as needed to reflect current and future needs and organizations
6. Research options to create inhouse foundation programs and staff to support ongoing legacy giving program, replacement reserve and endowment fund

2. Enhance programming, relevancy and engagement striving to attract seasonal and year-round participation

Goals:

1. Develop programming that is so appealing, attractive and engaging that people want to join and love to attend and participate
2. Enhance collaboration and coordination among all Jewish organizations to reduce duplication
3. Create Programming Committee chaired by a Board member with active participation of Board members, WCA, MCA, volunteers and staff to research needs, test ideas and implement programming that will be relevant and engage new and current participants, of all ages
4. Programming at the Federation is increased by 2-3 times over next 5-10 years
5. Explore new programs that will enhance growth and revenue streams such as Travel & Leisure, CEU's (Brandeis), services for the elderly, etc.

3. Increase outreach, community awareness and visibility to both Jewish and non-Jewish communities

Goals:

1. Increase active participation and engagement of the Jewish community in the Federation's programs
2. Expand outreach and communications to non-Jewish community as well as to recruit new participation/membership in the Federation
3. Establish the Federation as the central communal voice of the Jewish community in Greater Naples
4. Continue proactive policy against antisemitism and anti-hate
5. Increase the visibility of the Federation's leadership with other organizations in the Greater Naples community

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4. Recruit, develop and engage effective and capable leadership (staff and volunteer) to meet current and growing fundraising, administrative and programming needs

Goals:

1. Develop succession plan for current Board and committee leadership (chair and vice-chair) as well as staff leadership to ensure continuity and knowledgeable successors
2. Working with all Board members, identify qualified candidates, cultivate and recruit new members as well as younger individuals to the Board who are enthusiastic, generous and dedicated to the Jewish community
3. Implement effectual leadership orientation and training programs for Board and committee members as well as staff
4. Continue to build strong Board committee structure including non-board members, active membership, participation and generous support
5. Provide ongoing education for Board members
6. Evaluate ways to recruit more people to serve on various committees
7. Focus on engaging younger people with leadership development, volunteer corps, young leaders' program, missions and other plans to attract individuals (45-65 years)
8. Annually review and assess staffing needs, budget accordingly, recruit and retain well-trained, capable and enthusiastic staff and volunteers to coordinate fundraising initiatives, work with volunteers, deliver programs and address administrative needs

5. Develop and implement a comprehensive strategy for maximizing the utilization of the Nina Iser Jewish Cultural Center (NIJCC) and its impact on the Greater Naples Jewish community.

Goals:

1. Establish the NIJCC as a premier destination for Jewish events and those of the Greater Naples community
2. Develop methods and tools for collecting and analyzing:
 - a. Utilization
 - b. Customer satisfaction
3. Implement process for utilizing all available data to make process, policy and other improvements to increase utilization and customer satisfaction
4. Implement security practices, training and enforcement to ensure safety of attendees and staff