



## **Executive Committee Meeting**

**January 11, 2022 | 5:00 p.m.**

### ***Agenda***

- |      |   |                                  |
|------|---|----------------------------------|
| I.   | New Needs Assessment & Planning Collaborative * | Cindy Finestone & Susanne Landau |
| II.  | FedLED & Young Adult Leadership Engagement      | Jaclyn Marshall & Martin Klazmer |
| III. | Campaign Update                                 | Jonathan Frisch                  |
| IV.  | New JFNA Campaign for Ethiopian Jews            | Scott Notowich                   |

See [Israel Decision to Continue Ethiopian Aliyah | The Jewish Agency](#)

\*Attachment



## **Needs Assessment & Planning Collaborative**

**Mission/Goals:** To monitor and assess needs and service gaps in the Memphis Jewish community on a consistent basis and identify potential strategies for action.

**The Challenge:** Ensuring that Federation has an accurate and continuously updated knowledge of the changing needs of Memphis Jews.

**Current Situation:** In 2014, Federation undertook a major, community-wide Needs Assessment study, the results of which has informed Federation's agenda for the last 6 years. Since that time, Federation has engaged in more limited needs assessment and currently depends on the interactions and ad hoc communication by individuals and by partner agencies to identify the needs in the community. These needs are filtered up through contacts with Federation staff and volunteers to the Federation Grants Committee and the Board who together make funding decisions. Through established guidelines and formulas, the Board determines the total amount that the Grants Committee will award to Partner Agencies. The Board makes additional funds available to a wider range of recipients through Fedovation, Lemsky Endowment Fund, B'nai Tzedek grants and through special Board approvals. Needs are also filtered from Federation to Jewish Foundation of Memphis donor advised fund holders who support a broad array of community needs.

This system has enabled Federation to meet many important needs for many years.

### **Long Term Vision:**

We would like to have a data-driven process that:

- 1) Has a mechanism for regular feedback and touchpoints reaching as many demographics in our community as possible/practical;
- 2) Includes feedback from individuals as well as agencies to ensure everyone is heard;
- 3) Collects accurate and useful data to determine and explain funding decisions;
- 4) Is transparent to the community;
- 5) Has dedicated resources to ensure its sustainability.

Once this system is in place, it will be important to organize a governing structure which will give the funding decision makers the authority to respond to the data/needs even if the data leads them to make decisions that conflict with partner agencies or even a donor. This will be critical to the systems' credibility and the willingness of community members to buy in to it.



## **Proposed Approach**

In general, we will take a measured stair step approach to eventually achieve the long term vision. Each step will get us closer to a continuous data driven needs assessment.

- 1) Research: How do other Federations ensure timely knowledge of changing community needs? What are the tools, advantages/disadvantages?
- 2) Research: How do secular community foundations do this?
- 3) What resources will we need to implement a continuous system?
- 4) As we research the questions above, can we establish some credibility and demonstrate a "win" by using a data driven approach to some already identified areas of need and identify who would be best suited to address them:
  - Teen wellness and Jewish engagement (High Priority)
  - Millennial Israel engagement
  - Scholarships for Jewish preschool

# Memphis Jewish Federation's Annual Community Campaign

Progress Report for January 11, 2022

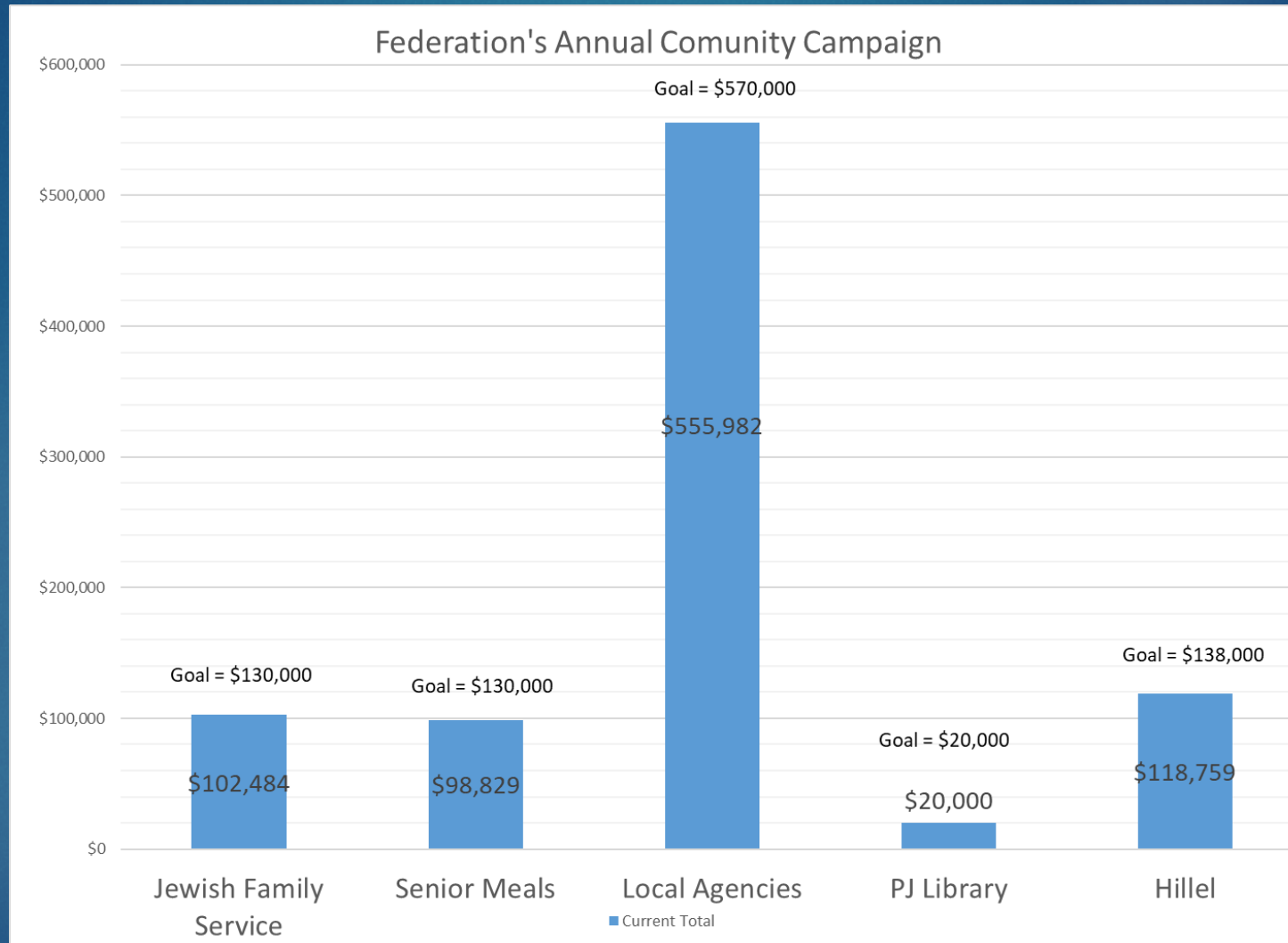


MEMPHIS JEWISH FEDERATION

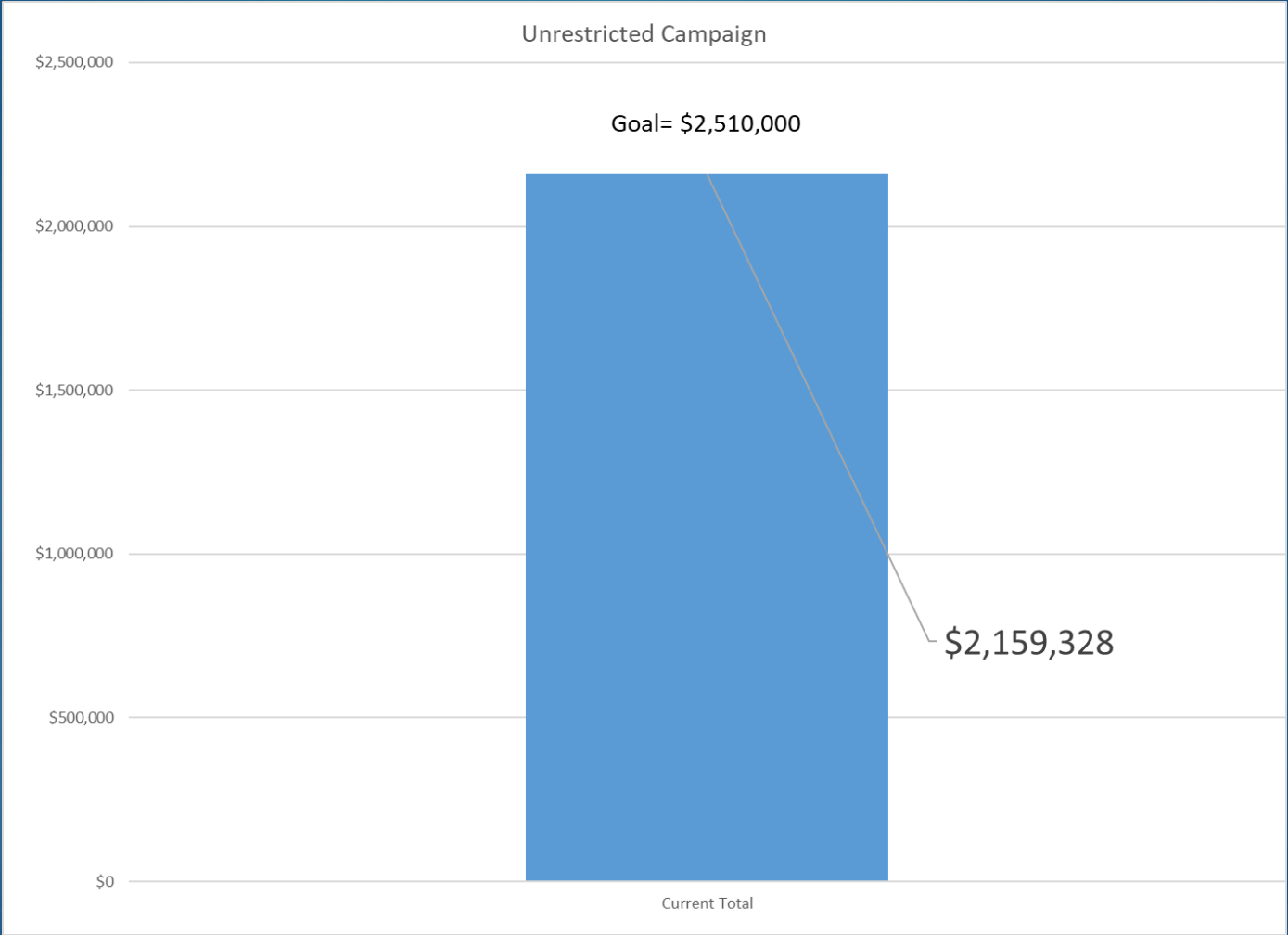
- Overall Campaign Goal

- \$3,143,117 Raised to Date
- \$423,381 Need to Reach Goal
- \$3,585,498 Total Goal

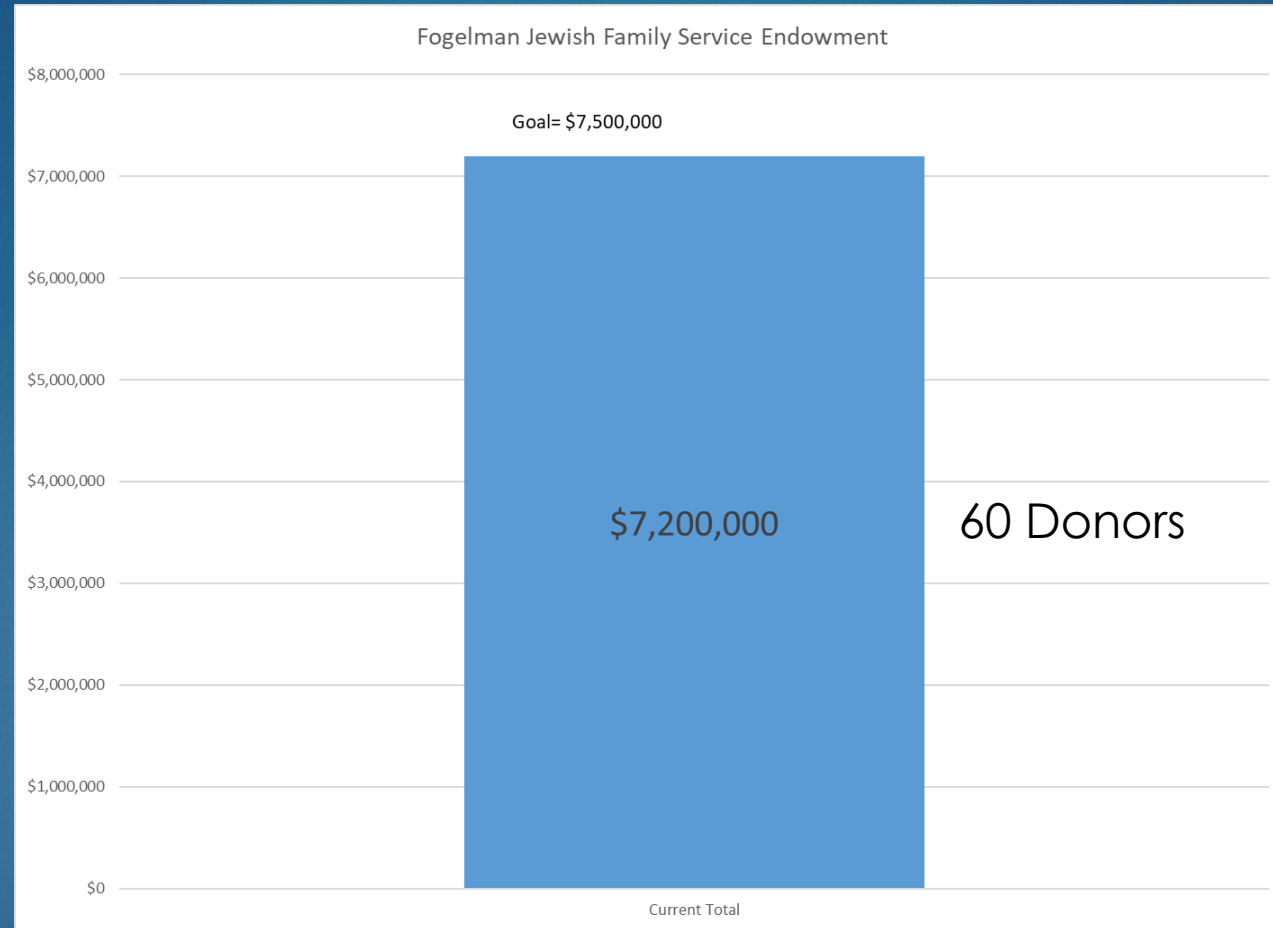
# Federation's Campaign Current Restricted Totals and Goals



# Federation's Campaign Current Unrestricted Total and Goal



# Fogelman Jewish Family Service Endowment Campaign



- Highlights from this year's campaign as of 1-11-2022

- 6 NEW Lions: Sherry Katzman, Jaclyn Marshall, Tracey Mendelson, Julie Neiman, Sharon Schwartzberg, and Stefanie Mintz).
- New UR gift of \$120,000 (from a new endowment fund).
- Closed 300 donors @ a 7% increase on leadership Sunday.
- Closed 190 donors in December.
- 12.5% increase in UR to-date.

# Proposed Closing Plan for the Campaign

- Call Nights to reach out to prior year donors: January 19, February 2, and February 17. All are scheduled from 7-8:30 PM;
- Mailing/emailing/text to All unassigned Donors who are open with a card value below \$1,000;
- Outsourcing New Donor Acquisition to Jigsaw Analytics & Ralph Sigel Marketing;
- FedLed Signature Event;
- Leadership outreach to 20-25 “up-grade” donors.

