



**JEWISH  
COMMUNITY  
FOUNDATION**  
OF GREATER HARTFORD

**2020 - 2022**

**STRATEGIC PLAN**

*Expanding Philanthropy and Impact*

**December 2019**



Developed in partnership with Fio Partners, LLC

## LETTER FROM LEADERSHIP

Thank you for your interest in the Jewish Community Foundation of Greater Hartford's 2020-2022 Strategic Plan, "Expanding Philanthropy and Impact," that will guide our organization's work for the next three years. This document combines equal measures of idealism and realism – attributes required for the Foundation and its community partners to succeed at achieving the shared goal of ensuring our vibrant Jewish future.

In an ever-evolving landscape in which technology advances, populations shift, and new societal and community concerns continue to emerge, the Jewish community finds itself facing new challenges every day. To address these challenges, the Foundation must do its part to provide more resources to the community by leveraging its core strengths and assisting our community partners to do the same.

To further increase our impact, we strongly believe that our primary focus must remain the effective cultivation of Jewish philanthropy, which inspires donors to invest in the organizations and causes they hold dear -- and leave charitable legacies that guarantee meaningful, joyful Jewish life for generations to come. The Foundation further recognizes the critical nature of fostering deep, trusting relationships; we are committed to expanding these relationships across the region with donors and community leaders, synagogues and agencies, and with the people in our community who are very involved, to those we have yet to engage.

To achieve this, the Foundation will enhance its development capabilities and grant making activities, increase our visibility, deepen collaboration with the Jewish Federation and community partners, while creating exceptional learning opportunities for donors, organizations and community members. We will further build upon the dedication of our passionate staff and lay leadership to uphold and innovate, enhance our culture and operations, and evolve our board to align with the changing nature of our work.

We'd like to thank our Board of Trustees and the lay members of the strategic plan's "Design Team" – Merrill Mandell, Walter Harrison, Gayle Temkin and Gerald Goldberg – for all the time and counsel they provided throughout the process. We are also grateful to our senior staff – Michael Elfenbaum, Susan Lotreck, Kathryn Gonnerman, Rhona Morgan and Maureen O'Connell for their roles as Design Team members and for the many hours they invested in refining the plan. Thanks also go to the lay leaders, donors and professionals who shared their views and constructive feedback, and to the entire Foundation staff which remains intricately involved in the planning and execution of this plan. We are also indebted to Anne Yurasek and Fio Partners for their invaluable contributions in designing, researching and crafting this document, while making the work enjoyable.

This is an exciting time in our community's evolution – one that is rife with opportunity. We are blessed with a wonderful Jewish infrastructure in Greater Hartford and talented cadres of leadership -- both established and new -- who recognize the need for collaboration, investment and change -- and are willing to put in the work to expand our collective impact.

It is our privilege to join with these leaders, donors, professionals and the diverse members of our great community in our collective pursuit of *tikkun olam* and meaningful Jewish continuity – in perpetuity.

Let's continue to go from strength to strength,

Leigh Newman  
Board Chair

Jacob Schreiber  
President & CEO

## OUR PROCESS

A Strategic Planning Committee, made up of members of the Board of Trustees and senior staff of the Foundation, was formed in March 2019 to develop a three-year strategic plan for the Foundation. The decision was made to engage a third-party consulting firm, Fio Partners, LLC (Fio) to provide guidance and pertinent experience to the effort.

Starting in April 2019, the Strategic Planning Design Team worked with Fio to design the information base needed to support the planning process. The Design Team and Fio gathered data from a variety of internal and external sources to help provide perspectives on our current state and trends which are likely to impact the future of the Greater Hartford Jewish Community and the work of the Foundation. The information gathering efforts included the following:

- Board of Trustees Survey
- Staff Climate Survey and Focus Group
- Historical Financial Analysis
- Focus Group with the *JewGood Hartford* Steering Committee
- Focus Group with the Grants Committee
- Community Stakeholder Interviews
- Interviews with Other Philanthropic Leaders (Jewish and secular Community Foundations)
- Compilation of Donor Perspectives and Reflections
- Center for Innovative Philanthropy (CIP) - Background and Recommendations Review
- Review Results of the 2016 JMAP Survey and 2019 JMAP Update

In late July 2019, the Board of Trustees and senior staff held a planning retreat. The results of the retreat informed the overall strategic direction reflected in the plan and provided input into suggested goals, strategies, and tactics.

Following the retreat, Fio worked with senior staff and the Design Team to reflect on the retreat results and develop the narrative plan document. The plan leverages Fio Partners' approach to nonprofit strategic management, which includes aligning leadership around mission, vision and values, designing or redesigning the primary work of the organization and its relational strategies (including fund development, marketing, and collaboration), strengthening management systems and supports, and strengthening methods to improve the organization.

The plan represents a proposed three-year scope of work and acts as the basis for the creation of the first, 18-month implementation plan, to be drafted by staff by the end of winter 2020. Proposed strategies and tactics for this first phase are denoted in bold throughout the plan. The plan also includes proposed areas of key measurements so that leadership can monitor implementation and track progress.

The plan was approved unanimously by the Foundation's Board of Trustees at its December 19, 2019 Board meeting.

## WHAT WE LEARNED

The information base gathering effort yielded a range of themes that helped to inform the future strategic direction of the Foundation.

**Viewed as a Credible, Trusted Partner:** The Jewish Community Foundation of Greater Hartford is viewed as a credible, trusted, neutral partner by key stakeholders. Through its leadership and success with the Aim Chai campaign, the grantmaking support provided to community organizations, and capacity building efforts and resources, stakeholders noted the organization's investments in the community and its steadfast commitment to preserving and supporting the Greater Hartford Jewish community. Community stakeholders expressed an interest in continuing to see the Foundation provide forward-looking, future-focused leadership around the evolution of the Jewish community.

**Shifting Community Trends:** Both internal and external stakeholders noted the shifting perspectives of the younger generation and the need for greater engagement of younger generations in the Jewish community, in synagogues, and in philanthropy. In addition, stakeholders noted the aging demographics and the deep concern that future volunteer leadership of community institutions is challenging to find and the commitment to supporting those institutions could decline in the future. The increased need for services to seniors was also noted. The two other substantive issues are the state of Jewish education in the community and concerns about its sustainability, as well as the need for re-invention. Stakeholders also expressed concern about the future of synagogues and the role of synagogues in the community in the future.

**Clarification of the Role of the Foundation in the Community:** Voices across the information base referenced a lack of clarity as to the roles of the Federation and the Foundation in the community. Some viewed the Foundation as responsible for ensuring the future well-being of both institutions and the community as a whole, while the Federation is responsible for bolstering the current status and needs of community institutions and the community. This was expressed a few times as "The Federation is the community checking account, and the Foundation is the savings account." Stakeholders noted the Foundation's role in spurring innovation, making significant investments in projects intended to have broad community impact, and strengthening community institutions through its grantmaking. The Federation was viewed as one of the programming arms of the community, while the Foundation was viewed as helping institutions ensure future sustainability. There were additional calls for collaboration and alignment between the two entities. Community stakeholders also noted the need for continued work around institutional capacity building.

**Evolution of the Organization:** Two key themes emerged out of the internal assessment efforts - the first, was the opportunity to address issues related to staff morale and team building. The second was the opportunity to strengthen engagement and committee functioning for the Board of Trustees. Across both internal and external perspectives, there was a call to action to the Foundation to share more about the considerable impact of its grant making and consulting, to spur more philanthropic investment in the Foundation and in the community, and to share more about its processes and decision-making.

**Shifts in Philanthropy:** Stakeholders and field leaders noted the speed at which philanthropy is evolving and donor expectations are shifting. The field leaders noted how the focus is shifting from "asks" to

educating, informing, and convening donors. From small donor convenings to roundtables to immersive experiences, leaders noted the need to help donors be more aware of community issues and what foundations are doing to invest resources in the community. The other major observation was the recognition of the competition in the market for donor advised funds. Given the low barrier to entry and lower fees at large financial institutions, foundation leaders noted the need to compete by delivering personalized service, offering deep expertise, and creating a community of philanthropists. In addition, to engage younger donors, stakeholders suggested increasing the use of social media and communications (sharing more stories of the impact of Foundation community investments), providing more volunteer events, more family-friendly events and opportunities, and opportunities for input and donor engagement.

## OUR MISSION, VISION, AND VALUES

### OUR MISSION

**The Jewish Community Foundation of Greater Hartford unlocks the transformative power of personalized and collective philanthropy to solve problems, strengthen community organizations, and provide permanent support for our Jewish community.**

### OUR VISION FOR OUR COMMUNITY

**Jewish. Community. Forever.**

**Jewish.** We reflect the community we serve and are guided by the Jewish values of *tikkun olam* (repairing the world), *tzedakah* (caring for those in need), and *tzedek* (pursuing justice).

**Community.** We believe in the power of every individual to make a difference and that together we can change the world. We envision a vibrant, diverse, inspired Jewish community in which all are valued, engaged and supported.

**Forever.** We are forward thinking, focused on impact, and always seeking dynamic opportunities that position our community to thrive for generations to come.

### OUR VALUES

**Collaboration (*Shituf P'ulah*)** – We partner as a team to solve problems and to celebrate achievements.

**Accountability (*Areivut*)** – We are responsible to each other and for one another.

**Respect (*Derekh Eretz*)**– We act with integrity and treat everyone the way we would want to be treated.

**Self-Reflection (*Cheshbon Nefesh*)** – We are open to constructive feedback and always willing to learn.

## OUR VISION FOR OUR ORGANIZATION

- The Foundation is a catalyst for encouraging the thoughtful, effective evolution of our community.
- We are known for our creative, proactive efforts that yield high-impact results and strengthen organizations, and for providing a superior donor experience.
- We will inspire philanthropy and strengthen endowments for our community institutions. We will act as responsible stewards for our investments and create new ways to invest in our community.
- We are viewed as a trusted partner by individuals and organizations who have a deep commitment to our community. We will seek complementary partnerships, both with our Federation and our community partners, to enact our shared aspirations for our community.
- The Foundation staff is a high-functioning team with diverse expertise. Each team member has opportunities for personal growth and contribution.
- Our Trustees are active, engaged ambassadors who promote the interests of our organization, help foster meaningful donor relationships, oversee the management of our assets and provide leadership for all our efforts across the community.

## OUR 2020 - 2022 GOALS

### **Goal 1: Increase Our Impact**

The Jewish Community Foundation of Greater Hartford defines its core activity as cultivating Jewish philanthropy, which inspires donors to invest in the organizations and causes they hold dear -- and leave charitable legacies that guarantee meaningful, joyful Jewish life for generations to come.

To achieve this, the Foundation will strengthen its efforts by further systemizing development and relationship building activities, enhancing grant making, leveraging our key influencers and piloting different approaches to expand our reach, and by creating unique learning opportunities for donors, organizations, and community members.

### **Goal 2: Utilize Marketing as a Strategic Tool to Bolster the Visibility and Objectives of the Foundation**

The Foundation will clarify and promote its personalized philanthropic services and the important roles it plays in providing immediate and long-term support for the Jewish community and beyond.

### **Goal 3: Evolve Our Infrastructure**

With the increased expectations of donors and the Foundation's interest in providing high-quality donor supports, the staff have recognized the opportunity to strengthen our internal systems, improve efforts to work across internal functions, and learn from our work.

### **Goal 4: Evolve Our Board of Trustees**

Our Board of Trustees will actively strengthen the activities of the Foundation by fine-tuning its processes, providing strategic direction and acting as ambassadors to support the philanthropic work of the Foundation.

## **OUR 2020 - 2022 GOALS AND SUPPORTING STRATEGIES AND TACTICS**

### **GOAL 1: INCREASE OUR IMPACT**

The Jewish Community Foundation of Greater Hartford defines its core activity as cultivating Jewish philanthropy, which inspires donors to invest in the organizations and causes they hold dear -- and leave charitable legacies that guarantee meaningful, joyful Jewish life for generations to come. To achieve this, the Foundation will strengthen its efforts by further systematizing its development and relationship building activities, enhancing grant making, leveraging our key influencers and piloting different approaches to expand our reach, and by creating unique learning opportunities for donors, organizations, and community members.

#### **STRATEGY A: Cultivate philanthropic and legacy giving through a range of individual and collective options**

*Proposed Tactics and Suggested Activities:*

- **Systematize our approach to stewardship and donor cultivation that includes moves management goals/metrics such as the number of touches, visits, donor discoveries and solicitations**
  - **Focus on strengthening relationships and the overall donor experience with current donors**
  - **Undertake analysis of current Foundation relationships, seeking to understand where the Foundation has strong relationships and where gaps may exist across the community, and create a cultivation strategy**
    - Current donors
    - Geographic lens
    - Demographic lens
    - Presence in community institutions/organizations

- Strengthen joint efforts with Jewish agencies and synagogues around identifying, developing and stewarding their current and potential endowment/legacy donors
- **Leverage the Foundation’s key influencers by:**
  - **Enhancing the role of Trustees to support the philanthropic efforts of the Foundation (e.g., sharing our story, donor stewardship, education and cultivation)**
    - Reconstitute the Development Committee to help staff with donor cultivation activities
    - Capitalize on the strengths of each Trustee to contribute to these efforts
  - Rebuild our relationships with cadre of financial advisors, accountants and attorneys to foster their proclivity for sharing information about the Foundation with their clients
    - Create and begin executing on a plan of action
    - Consider offering a program for continuing education credits
- **Provide unique learning experiences by:**
  - **Continuing to cultivate our current giving circles (JewGood and Lillian Fund)**
    - **Establishing criteria/assessment for success and develop annual work plans**
  - Creating opportunities to see “philanthropy in action” – sharing the impact of investments for current and future donors, such as immersive experiences and site visits
- Explore new approaches to increase our portfolio of donor advised funds
- Piloting approaches to engage the next generation of donors (e.g., explore creating incentives, such as matching fund opportunities, working to eliminate barriers to giving, concentrating on multigenerational family education)

**STRATEGY B: Continue to invest in strengthening the capacity and effectiveness of our community institutions through expanding strategic grantmaking**

*Proposed Tactics and Suggested Activities:*

- **Prioritize trust-based relationships and ongoing listening with organizations to inform our work and identify needs**
- **Re-examine the eligibility and outcomes criteria for the Community Grants Program to elicit a wider range of new ideas and expand the populations we serve**
  - **Pilot including synagogues and locally focused programs from national Jewish organizations**
  - **Consider expanding capacity-building funding to include critical infrastructure and consulting needs**
  - **Invest more time at Board meetings to review grants and impact**

- **Continue the Foundation’s commitment to proactively identify and support high impact Jewish engagement programs**
- **Expand opportunities to link organizational needs with donor interests (organization wish-lists, short-term and long-term needs)**
- Work with community partners to identify and fund emerging community-wide projects to address community challenges/opportunities

### **STRATEGY C: Develop partnerships and new approaches to create positive community impact<sup>1</sup>**

#### *Proposed Tactics and Suggested Activities:*

- **Engage in a formal, facilitated process with the Federation to further foster/institutionalize collaborative efforts that better define and maximize our distinct and collaborative roles in strengthening Jewish community**
  - **Items for discussion may include collaborative efforts on financial resource development, planning, marketing/messaging, grant making, etc.**
  - Promote the outcomes of this process by:
    - Working with the Federation to create messages that complement each other’s work and clarifies each organization’s unique roles
    - Developing a communication influencer plan to gain support from Foundation and Federation board leaders and other community influencers
    - Holding public forums (Conversations with CEOs) to discuss items impacting the Jewish community and how the Foundation and the Federation will approach these issues
- **Determine whether to continue the JMAP project**
- Collaborate with community partners to support collective problem solving across silos; serve as a neutral convener, where appropriate
- Explore opportunities for new models of investing in the community (e.g., impact investing, impact funds for transformative projects)
- Establish Foundation matching grants to organizations to spur fund development and to strengthen endowment giving
- Offer best practices/resources related to fund development and philanthropy

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<sup>1</sup> Note: Our ability and timelines for achieving these will likely become clearer after our collaboration discussions with Federation.

## GOAL 2: UTILIZE MARKETING AS A STRATEGIC TOOL TO BOLSTER THE VISIBILITY AND PRIMARY OBJECTIVES OF THE FOUNDATION

The Foundation will clarify and promote its personalized philanthropic services and the important roles it plays in providing immediate and long-term support for the Jewish community and beyond.

### STRATEGY A: Clarify our distinctive role in cultivating philanthropy

*Proposed Tactics and Suggested Activities:*

- **Create annual marketing plans to guide our work**
  - Establish an overall calendar of communications and media outreach efforts (ensuring digital media activities, regular email, social media communication and traditional media engagement)
  - Measure qualitative and quantitative results
- Create time-limited campaigns with defined success metrics and clear calls to action (e.g., year-end, product specific, interest area specific)
- **Strengthen and simplify our overall messaging strategy**
  - Create clear messages (elevator pitch) on Foundation's mission, purpose and differentiators
  - Segment audiences and develop distinct messages for each audience profile
  - Produce messaging toolkits for Foundation key influencers, including Trustees

### STRATEGY B: Enhance visibility and understanding of our services and impact

*Proposed Tactics and Suggested Activities:*

- **Support development activities to cultivate new donors**
  - **Create donor cultivation collateral including prospect and welcome kits**
  - Profile and publicize donors who are deepening their philanthropy through the Foundation
  - Market products specific to donor life events (e.g., Simcha Funds, B'nai Mitzvah Funds, Memorial Funds)
- Produce multimedia content that will elevate community voices and allow the community to explore issues in new and different ways
  - **Convert website into an interactive story-telling and donor education portal**
  - **Create traditional media briefing opportunities surrounding story leads and deepen relationships with key media contacts**
  - **Produce video interviews with donors, board members and scholarship recipients**
  - Launch a new podcast series

### GOAL 3: EVOLVE OUR INFRASTRUCTURE

With the increased expectations of donors and the Foundation's interest in providing high-quality donor support, the Foundation must strengthen its internal systems and improve efforts to work across internal functions.

#### STRATEGY A: Transform our information management systems

*Proposed Tactics and Suggested Activities:*

- **Develop organization-wide information management plan**
  - Identify all the organizational elements that are supported by data collection, analysis and reporting
  - Review for continuing relevance and effectiveness from the perspective of the decision makers who use the information and from the perspective of line staff who interact with the system
  - Identify any areas needing improvement or upgrading, e.g., CRM system
  - Involve software and hardware vendors at the point when organization needs are clear
- Acquire a new fund accounting management system, which may also involve updating other major management systems, including financial management and donor services/reporting
  - **Evaluate different information management systems to identify best fit for our needs**
    - Consider integrated systems that would include customer relationship management
  - Select and implement new system
    - Revise all policies and procedures, as needed, based on system selected
    - Review and update job descriptions, aligned with system requirements and procedures
- Implement cloud-based document management to keep up with trends in information management

#### STRATEGY B: Strengthen our human resources and organizational development systems and supports

*Proposed Tactics and Suggested Activities:*

- **Assess human resource support needs and consider how best to bring those supports into the organization (assessment, need identification, hire/outsource)**
- **Monitor team effectiveness supports (huddles, staff meetings, retreats, trainings) and promote open dialogue on status/progress**
- **Develop a system for cross-training staff to be able to provide backup on key function areas**

- Review and enhance performance management supports, goal setting and individual professional development plans
- Offer trainings to staff throughout the year on key organizational topics (e.g., management and supervision, giving and receiving feedback, team effectiveness)

### STRATEGY C: Develop approaches to learn from our work and reflect on our progress

#### *Proposed Tactics and Suggested Activities:*

- **Reflect on bi-annual grantee reports and discuss the implications of findings with Grants Committee and Trustees, periodically**
- **Evaluate and enhance the management dashboard**
- Develop approaches to garner feedback from fund holders and agency leadership on a regular basis and ensure findings are synthesized for implications for the work of the Foundation (create ongoing feedback loops)

### STRATEGY D: Strengthen financial management systems and supports

#### *Proposed Tactics and Suggested Activities:*

- **Develop key result areas for financial health, with agreement of Board of Trustees for key targets**
- **Develop succession planning approach for financial function leadership**
  - **Continue cross-training key staff to ensure back-up support**
  - **Document/update key process documents, prior to implementation of new system**

## GOAL 4: EVOLVE OUR BOARD OF TRUSTEES

Our Board of Trustees will actively strengthen the activities of the Foundation by fine-tuning its processes, providing strategic direction, and acting as ambassadors to support the philanthropic work of the Foundation.

### STRATEGY A: Enhance Board functioning, engagement and involvement

*Proposed Tactics and Suggested Activities:*

- **Develop annual goals for the Board of Trustees as a whole, linked to the strategic plan** *(examples could include goals related to Trustee engagement and education, committee participation, monitoring of strategic plan implementation)*
- **Review key governance documents which support Board functioning and ensure currency and application** *(role descriptions, expectations, Board policies)*
- **Strengthen committee functioning through review of committee charters, leadership, and membership**
  - Develop training for committee/on-boarding chairs to discuss best practice approaches for committee meetings/experiences
- **Support Trustees in selecting approaches to increase their individual engagement and contribution to the Board**
- Review Board meeting agendas and ensure opportunities for staff reports, more open dialogue on important topics and critical issues, and learning opportunities
- Conduct Trustee exit interviews

### STRATEGY B: Fine-Tune Trustee recruitment and succession

*Proposed Tactics and Suggested Activities:*

- **Develop revised skills and experience matrix for current Trustees and identify gaps/priorities for recruitment, aligned with strategic plan aspirations**
  - Encourage Board members to continue to engage qualified people to replace them
  - Utilize committees as methods to introduce Board service to potential Trustee candidates
- **Review Trustee recruitment processes**
  - **Strengthen approaches to Board leadership succession planning efforts, seek ways to capture institutional and community knowledge**

## MONITORING OUR PROGRESS

The Strategic Plan is a living document that is a road map by which the CEO and Board of Trustees should be held accountable. The plan should be utilized to create annual goals for the CEO/organization and for the Board of Trustees. Progress against annual goals can be monitored by ensuring regular updates on plan progress at Board of Trustees meetings and consistent reporting on desired key results, as noted below.

In addition, a detailed implementation plan will be used to track progress against the selected strategies and tactics for the first year and then updated accordingly for each successive year.

## KEY RESULTS

The implementation of the Strategic Plan is envisioned to enact a set of measurable key results. For each goal, the table below outlines proposed key areas of measurement. It is envisioned that a dashboard of key results would be created to track progress and be reported to the Board of Trustees periodically throughout implementation.

Goal	Proposed Key Areas of Measurement <i>(with example metrics)</i>
<b>Goal 1: Increase Our Impact</b>	<ul style="list-style-type: none"> <li>• Key selected stewardship metrics (process indicators)               <ul style="list-style-type: none"> <li>○ Referrals (Board, nonprofits, others)</li> <li>○ Visits, meetings, touchpoints</li> </ul> </li> <li>• Engage at least 20 professional advisors, attorneys, and accountants through one-on-one meetings and learning opportunities; ensure methods in place to track referrals from this group</li> <li>• Number of giving circle members</li> <li>• Number and value of capacity building and engagement program grants made (organizations, synagogues)</li> <li>• Number and value of donations released from donor advised funds for specific organizational needs (community wish list, staff referral)</li> <li>• Results of stewardship efforts               <ul style="list-style-type: none"> <li>○ Number and value of new endowment funds</li> <li>○ Number and value of new custodial funds</li> <li>○ New Donors &gt;\$5000</li> <li>○ Number of Gifts &gt; \$5000</li> <li>○ Bequests - As a of total donations %</li> <li>○ Bequests - # of Legal Transfer Gifts</li> <li>○ Bequests - Values of Bequests</li> <li>○ Legacy Commitments - # of commitments</li> </ul> </li> </ul>

<b>Goal</b>	<b>Proposed Key Areas of Measurement</b> <i>(with example metrics)</i>
<b>Goal 2: Utilizing Marketing</b>	<ul style="list-style-type: none"> <li>• Social media including Page Likes, Post Engagement</li> <li>• Email marketing including Average Open Rate</li> <li>• Media placements (earned, owned and paid)</li> <li>• Results achieved through marketing campaigns</li> </ul>
<b>Goal 3: Evolve Our Infrastructure</b>	<ul style="list-style-type: none"> <li>• Systems evolution metrics as determined</li> <li>• Number of staff trainings offered and attended (internal and external)</li> <li>• Staff climate survey results (conducted half-way through the plan cycle)</li> <li>• Selected key financial results</li> </ul>
<b>Goal 4: Evolve Our Board of Trustees</b>	<ul style="list-style-type: none"> <li>• Engagement (whole and committee level)</li> <li>• Progress on goals (based on self-assessment and annual goals)</li> <li>• Recruitment and on-boarding</li> </ul>