A STRATEGY FOR GOOD

2017 STRATEGIC PLAN UPDATE

Jewish Federation of Durham Chapel Hill
FROM THEN

From meeting in basements, planning on napkins and knocking on doors...to creating a grounded, inspiring permanence. A place for good.

It’s from this place that we give and do for those in need throughout our community. It’s where we leave young campers with summers to remember. And provide our community with a thriving center for the health, well-being and camaraderie of all.

TO NOW
A DREAM FOR DOING GOOD

We started with a vision: a unifying home for our small community.

We dreamed of a permanent place for doing good—a place where we could better serve our local Jewish community.

We opened our new doors in 2011 to make this happen and began our transformation. We've grown from a philanthropic organization to a 'giving & doing' organization—providing robust programs and services along with a 100% membership-supported healthy living division.

Our Vision

a place where...

Philanthropy exceeds our community’s needs
Community standing is admired and inspiring
Social, cultural and recreational activities thrive
Finances are self-sustaining and forward-focused
Within a few years after opening we started facing challenges.

*Financial instability.* Running several years of deficits left us with limited reserves.

*Fuzzy messaging.* The word about our purpose and activities—the good we provided and positive outcomes we enabled—was not reaching the community.

*Operational snags.* We were understaffed in some areas, overstaffed in others. Our programming was limited. And we lacked a clear strategy to guide priorities.

*Fundraising slowing.* Our Annual Campaign donor base was shrinking. The lack of effective directed giving channels was eroding the trust of our donor base.

We needed to reconnect with our community by creating a strategic plan—to restore their faith in our original vision for our new space.

**A strategy to fulfill our vision**

Conventional business acumen proves itself time and again: if you can’t measure it, you can’t improve it. Which is why in 2013 we created a strategic plan—focused on four key areas—we could easily track and assess year over year.

*What follows are the clear, measurable results we’ve achieved.*
**Strategy**

Expand programs & events to better target high-use segments

Goal

Create a year-round program calendar with activities and events targeted to our markets

Drive engagement by strengthening our volunteer network

Goal

Attract more volunteers who are meaningfully engaged

Use allocations to strengthen community connections

Goal

Link allocations to revised mission

Define a social media strategy to connect people to activities

Goal

Magnify social media uses (Facebook and Twitter) to increase connections
Outcomes

- Added new programs for families with young children
- Doubled the number of Schools Out days
- Expanded camp from 800 camper weeks to 1200
- Grew cultural programs from 1-2 per month to 1-2 per week (Includes book club, movies, cooking classes, art classes, museum tours and more.)

- Hired a JFS Programming and Volunteer Coordinator to manage JFS volunteer program
- Created a system to coordinate hundreds of volunteers
- Expanded volunteer options to include large group activities as well as individual ones

- Re-established the Allocations Committee with the direction of giving locally and abroad

- Launched ongoing Facebook media campaigns for both the JCC and Federation
- Communications Manager now monitors connections
<table>
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<tr>
<th>Strategy</th>
<th>Goal</th>
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<tbody>
<tr>
<td>Identify unique programs and services that require the Jewish community’s involvement and intervention</td>
<td>Develop JFS services and programming plan. Create policies and procedures for service provision.</td>
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<td>Improve tracking and communication of impact</td>
<td>Develop JFS tracking mechanism on clients being served and services offered</td>
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<tr>
<td>Create systematic approach to welcoming and serving Jewish community members with special needs</td>
<td>Increase the number of ways we reach members with special needs.</td>
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Outcomes

- Continued and improved key programs (Chaverim and Clinical Connections)
- Added new services such as case management, a series on aging and another on grief
- Adopted best practice policies and procedures for delivering financial assistance
- Established monthly data collection and reporting
- Doubled client contacts to 200/month since 2013

- Served 30 campers with special needs in summer 2016
- Now managing BRIDGES program internally to promote it to a broader base

Establish a service platform to help those in need
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<td>Identify new/innovative channels to raise funds and expand revenue</td>
<td>Develop and implement 3 programs that each generate income streams of $10,000-$15,000 annually.</td>
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<td>Professionalize and increase staff ownership of campaign</td>
<td>Staff activities account for at least 25% of all funds raised. Staff owns infrastructure and uses lay leaders for solicitation</td>
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<td>Develop strategy to retire debt</td>
<td>Develop long range financial plan to address debt obligation</td>
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<td>Assess the role of Foundation to best support mission</td>
<td>Develop an assessment plan</td>
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3  FINANCIAL
Outcomes

- Schools Out programming generated $60K in 2016
- Personal Services (Massage, Pilates, and PT) generated $90K in 2016
- Food Festival generated $10K in 2016

- Trained staff to lead 2016 annual campaign and assigned solicitors
- Provided updates on closed cards and campaign completion
- Organized donor outreach call-a-thons
- Drafted messaging to use for solicitations
- Created special solicitation scripts and assignments for senior staff

- Launched Retire The Debt Campaign in fall 2015
- Raised nearly $1M to cover debt service payments through 2018

- Launched Community Foundation Task Force in fall 2015
- Approved Foundation plan in April 2016
- Secured staffing for 5 years
- Leading the community-wide Grinspoon Life and Legacy program

Achieve longterm financial stability/viability
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<td>Create systems to improve customer satisfaction— include goals, actions and metrics</td>
<td>Conduct regular JCC membership satisfaction surveys. Review results with Board, committees, and staff to allow for continuous improvement</td>
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<td>Revise and improve budgeting process</td>
<td>Empower staff to own and be accountable to budgets</td>
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<td>Develop multiyear financial plan that integrates all activities under one budget review process</td>
<td>Complete 5 year financial plan</td>
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<td>Conduct full audit of Federation financials</td>
<td>Develop a plan for conducting an audit</td>
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<td>Turn the Federation into a desirable place to work</td>
<td>Hire and train talented people</td>
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<td>Create competitive salary and benefit policies</td>
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<td>Start a professional development program</td>
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Outcomes

- Improved customer satisfaction using benchmark data and survey results
- Raised JCC membership retention rate to 72% as of December 2016

- Staff own and are accountable for their budgets
- Senior staff can now review monthly financials together to monitor budgets make adjustments
- We extended budget by $130K allowing funding of reserves

- Finance committee is updating this plan and will present to the board as we launch the 2018 budget process

- Circulated an RFP for audit in summer 2016
- Audit will be conducted in 2017 on 2016 financials

- Revised paid time off, parental leave plan and other personnel policies
- Set up ongoing senior and organizational staff meetings
- Developed new staffing structure, job descriptions, and pay scales
- Established and completed annual evaluation process focused on goals and growth needs
- Offered professional development plans based on annual evaluations for each employee
- Collected qualitative feedback on employee satisfaction to measure against 2017 results

Establish operational excellence
Actualizing the Strategic Plan

Actualizing a plan is more than meeting a goal. It’s reaching, exceeding and stretching beyond that goal. So that every yearly plan is elevated and expanded by the plan before it.

We bear this in mind—informing every decision we make—as we move through 2017 with our sights set on 2018. We believe that the good we disseminate today will be magnified multifold in the future—when ‘now’ becomes ‘then’.
RESULTS

Implementation:
Measure & improve

Implementation:
Stretch our goals

Next Plan

15  2016  2017  2018