

Prepared for:



The Birmingham
JEWISH FEDERATION

Birmingham Jewish Federation Strategic Plan



PANORAMIC
STRATEGY

TABLE OF CONTENTS

Introduction and Purpose 3

The Planning Process and Community Input 4

Mission and Vision 5

Priorities and Goals 6

Community Proposals 7

 Community Proposal #1: Jewish Community Members as the Primary Audience 8

 Community Proposal #2: Integrating Philanthropy Through a Single Organization 9

 Community Proposal #3: Elevating Jewish Institutions Through Integration 11

 Community Proposal #4: Rightsizing Real-Estate to Deliver Services 14

 Community Proposal #5: Outreach, Focused On Younger Demographics 16

 Footnotes to the Community Proposals 18

Federation Proposals 19

 Federation Proposal #1: Engagement / Inclusion 20

 Federation Proposal #2: Maximizing Resources 22

 Federation Proposal #3: Funding / Philanthropy 24

Considerations for Future Years 26

Key Initiative Implementation: Community Proposals 27

Key Initiative Implementation: Federation Proposals 28

Measuring Success 29



INTRODUCTION AND PURPOSE

The Birmingham Jewish Federation leadership determined that the opportune moment had arrived to embark on a strategic planning process. The young leadership of Birmingham's Jewish community demonstrated their commitment to the future of our Jewish community through the *Roadmap* process completed in 2019. Shortly thereafter, The Birmingham Jewish Federation hired a new CEO.

A number of other community-based factors highlighted the importance of the unique moment to plan for the future for the organization and its impact on the entire Birmingham Jewish community. A few of those factors include:

- ▶ New permanent and interim professional leadership across several local Jewish institutions
- ▶ A strong core of engaged young adults demonstrating future leadership
- ▶ Acknowledgement of the need for changes to achieve financial sustainability to support high quality services and programs for the Jewish community
- ▶ Real estate assets that could become the basis for supporting future sustainable services in a more cohesive manner

With financial support from the Birmingham Jewish Foundation, the Federation set out to pursue this unique opportunity and embark on a course for the Federation's future. However, to define its future, the Federation needed to understand the future needs of the Birmingham Jewish community and the priorities of its members.

It is the intention that this strategic plan be seen as a set of proposals that can strengthen the entirety of the Birmingham Jewish community, recognizing that, although the Federation has the ability to directly address certain needs and desires of the community, integration, stronger partnerships, and collaboration are critical to accelerating and amplifying the impact on our entire Jewish community.

The success of this strategic plan and the implementation of its supporting proposals will depend on the understanding, support, and willingness to embrace change of the members of the Birmingham Jewish community.



THE PLANNING PROCESS AND COMMUNITY INPUT

In order to identify the future role of the Federation in our Birmingham Jewish community, the Federation Board formed a strategic planning Task Force composed of diverse community members who represent the breadth of community leadership.

The Task Force recognized that any plan needed to ascertain the goals and needs of the broader Jewish community, and also to benefit from the experience of other similar communities. It therefore retained the services of Panoramic Strategy, led by David Kaplan, who provided guidance on how to move the process forward and to share other community efforts.

The Task Force's strategic planning process was rooted in listening to and learning from the Jewish community. Representative of the following key stakeholder groups were initially interviewed to ensure that outcomes of the strategic planning process included diverse perspectives of our Jewish community:



Jewish professional leadership



Rabbinic representation



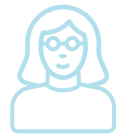
Jewish agencies and institutions



Major donors



Board members and lay leaders



Young adult representatives

The Task Force continued listening to the community through a community survey that attained 557 responses, including 20,000+ individual data points and 100 slides of analysis based on those survey responses. Focus groups were conducted to fill in underrepresented areas in the survey, ensuring that a broad range of community voices were heard on the opportunities and challenges the Birmingham Jewish community will need to address in the coming years.

Each proposal for the community and the Federation contained in this plan references the specific supporting survey response as well as general interviews.

If you would like to review the survey responses, please log on to www.BJF.org and click on [Survey Report*](#).

**<https://bjf.org/wp-content/uploads/2022/02/Birmingham-Full-Report-10.6.21.pdf>*

MISSION AND VISION

At the heart of the Birmingham Jewish Federation's strategic plan is the mission of the organization and community vision for the future. Following the important steps in listening to the community, the Task Force worked diligently to determine a vision for our Jewish community and refine the mission for the Birmingham Jewish Federation in support of that vision.

The vision statement represents a compelling picture of an aspirational future, which prepares us to set bold, audacious goals and plans for the coming years. An aspiration for the future represents not only what we want to achieve as an organization, but also what we believe is possible as a community.

The mission consists of our "why" as an organization, at the most meaningful level. Without defining each component of our work, the mission highlights what motivates and grounds us in the work every day.

Birmingham Jewish Community Vision for the Future:

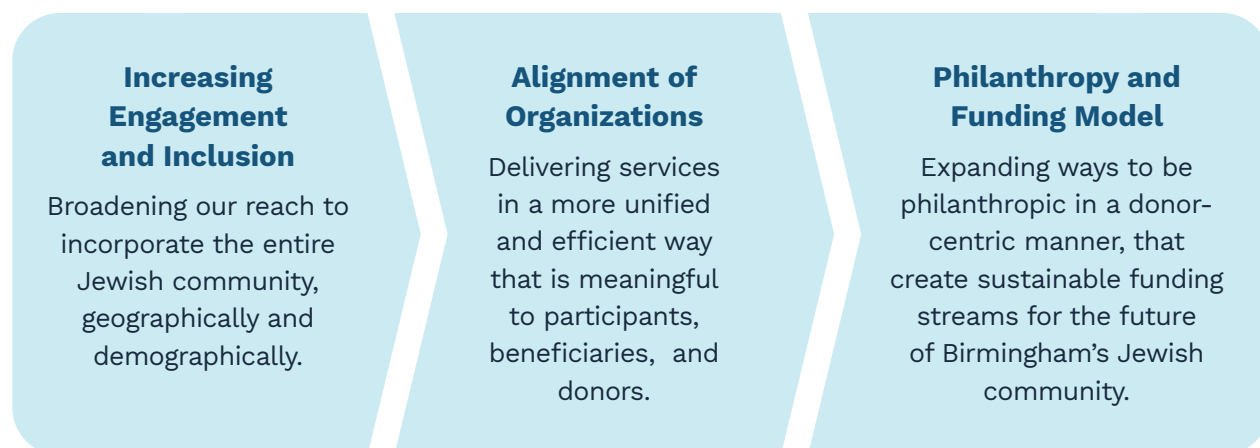
**"One community empowering Jewish journeys,
driven by tradition, innovation and sustainability."**

Birmingham Jewish Federation Mission:

**"To ensure a vibrant, inclusive Jewish
community in Birmingham connected to Jews
in Israel and around the world."**

PRIORITIES AND GOALS

To achieve the Federation's mission and work towards the vision of our collective future, the Task Force prioritized key areas where the Federation is uniquely positioned to drive impact.



Following the guidance of the community's input, the Task Force identified four goals that represent a commitment to ensuring vibrant Jewish Life in Birmingham and a willingness to make the choices necessary to achieve a shared vision for the future.

Reorganization/Realignment: Increase the quality of Jewish programming through a unified service and program delivery model.

Engagement/Inclusion: Create Jewish engagement for a lifetime through social connection, volunteering, learning and leadership.

Focus Resources: Maximize efficient use of resources to strengthen the Birmingham Jewish Community across five areas of impact prioritized by the community.

- Antisemitism, safety and security
- Jewish education from cradle to grave
- Social services and emergency needs of the Jewish community
- Jewish culture, identity and outreach
- Support of, and connection to Israel

Funding/Philanthropy: Implement unified community fundraising to expand both annual federation funding and foundation legacy gifts by 50% over 5 years as part of moving towards a stable, sustainable Jewish community.

Birmingham Jewish Community Vision for the Future:

**“One community empowering Jewish journeys,
driven by tradition, innovation and sustainability.”**

COMMUNITY PROPOSALS

Achieving the vision highlighted in this strategic plan requires moving beyond the Federation as an organization and into the context of community. In the role of a convening organization, the Federation is positioned to bring proposals forward that capitalize on the collective strength of our institutions, identify actions that will accelerate our collective success, and then facilitate the process to bring these proposals to fruition.

In structuring the proposals, the focus was not on cost reduction, but rather on coordination and efficiency in providing the highest quality services to our Jewish community. It is our expectation that reinvesting our resources by enacting these proposals will broaden the Federation’s ability to serve the Jewish community for generations to come.



COMMUNITY PROPOSAL #1

JEWISH COMMUNITY MEMBERS AS THE PRIMARY AUDIENCE

The primary customer of Jewish community services should be Jewish community members, while recognizing that the broader impact on the Birmingham community fulfills Jewish community values and amplifies our impact.

- ▶ Jewish community should be defined in the broadest sense, allowing for all expressions, affiliation and practice to be incorporated into what it means to be Jewish in Birmingham.
- ▶ Building bridges to the broader Birmingham community is also important to achieving the community objectives (e.g. addressing Anti-Semitism) and may be necessary to generate financially sustainable models of service delivery (e.g. Jewish education and preschool).

Community Research References:

- Six in 10 (or more) survey respondents said it is very important that the Birmingham Jewish Federation fight Anti-Semitism (76%), address community safety and security (65%) and fund emergency needs (61%). (Survey Report - pages 68-69)
- Less than 3 in 10 survey respondents said it is very important that the Birmingham Jewish Federation provide assistance to non-Jews in need, the lowest ranking for any activity listed. (Survey Report - page 69)



COMMUNITY PROPOSAL #2

INTEGRATING PHILANTHROPY THROUGH A SINGLE ORGANIZATION

The Federation and Foundation teams responsible for philanthropy across the Birmingham Jewish community should be fully integrated to lead donor-centric philanthropy, expand the sustainable philanthropic dollars available to the entire community, protect the community's assets, and generate a pipeline of community development professionals. It is envisioned that fundraising, grants, allocations, operations and administrative functions will be consolidated within the Federation, while asset ownership and investment strategies will be managed through the Foundation. All philanthropic commitments would be honored.

- **Professional Team Integration:** A single team working on behalf of the community will leverage the strengths of both the Federation and Foundation, creating administrative efficiencies that drive lower average costs and larger contributions. The Federation currently provides some administrative services to the Foundation.
- **Hiring:** One senior development professional will have overall responsibility for both annual and legacy fundraising strategy.
- **Governance:** The Board structure of the two organizations will remain as will strong checks and balances to ensure protection of community assets and donor confidentiality.
- **Community Alignment:** The Federation and Foundation reach out to the same donor base and service the same general grant recipients, providing an opportunity to coordinate funding and streamline services.

Timeline: Approximately 12 months.

COMMUNITY PROPOSAL #2 (CONT.)

Community Research References:

- 69% of survey respondents think it is important for Jewish organizations to reorganize and provide services in a more unified manner, over six times higher than the proportion of survey respondents who are opposed to the idea. (Survey Report - pages 55-57)
- 56% of survey respondents think it is important for Jewish organizations to provide a unified giving structure to support Jewish institutions. For every 3 people who felt this was important, only one was opposed to the idea. (Survey Report - pages 55, 58-59)
- Segments of the community that are most supportive of a more unified giving structure to support institutions include current donors to the Birmingham Jewish Federation and those who believe Birmingham to be a vibrant or somewhat vibrant place to live.
- Individual interviews demonstrated general consensus among key stakeholders that a unified giving structure would strengthen the Birmingham Jewish community.



COMMUNITY PROPOSAL #3

ELEVATING JEWISH INSTITUTIONS THROUGH INTEGRATION

Delivering the highest quality programming to the Birmingham Jewish community is best served in a model where organizations further integrate and avoid duplication, building on the strengths of each organization to maximize the resources available for the Birmingham Jewish community.

We recommend that the following institutions integrate to ensure seamless continuity of engagement and philanthropy across the community for participants of every age:

- ▶ **Birmingham Jewish Federation (Phase 1)**
- ▶ **Birmingham Jewish Foundation (Phase 1)**
- ▶ **Levite JCC (Phase 2)**
- ▶ **N.E Miles Jewish Day School (Phase 2)**

An integrated organization would have the following key characteristics:

- ▶ **Single team:** One professional leader with a single team operating services for the Jewish community, functionally integrating the operations of the various organizations.
- ▶ **Coordinated Jewish Education:** The programming strengths of the Federation, Levite JCC, and N.E. Miles Jewish Day School can be integrated into an education platform for the Birmingham Jewish community, creating seamless transitions between Jewish educational experiences, building a pipeline of participants and elevating the quality of all activities.
- ▶ **Governance:** Simplify the operations of integrated entities into two Boards: One for operations (Federation) and a second for protecting the community's assets (Foundation).
- ▶ **Community Involvement:** Build out a committee structure within each operating entity to ensure the highest quality service delivery and increase community involvement while streamlining professional and lay leadership, further focusing our limited financial and leadership resources.

COMMUNITY PROPOSAL #3 (CONT.)

- ▶ **Brand identities:** Maintain the brand identities of existing institutions within the integrated institution, as a “House of Brands” in order to preserve the history and affiliation of all partners.
- ▶ **Professional Pipeline:** Leverage resources across institutions to amplify our impact through a stronger and more sustainable suite of Jewish professionals leading our community.

Additional Affiliation/Collaboration: Following phase 1 and 2 of the integration process, additional affiliation and collaboration opportunities may become available in future years based on the success of the initial integration. The potential organizations are:

- ▶ **Collat Jewish Family Service**
- ▶ **Alabama Holocaust Education Center**

Timeline: The process of phases 1 and 2 of community integration is anticipated to take approximately 24-36 months to complete. The following steps are recommended within the first 12 months:

- ▶ Develop a shared understanding of the future with each institution, to be incorporated into an agreement to begin the integration process.
- ▶ Develop a formal agreement that demonstrates the commitment of each participating organization to the process of integration and initiates a formal process to integrate while acknowledging unknown elements that need to be clarified in the process.
- ▶ Establish the lay and professional leadership structure to implement and direct the integrated operations.



COMMUNITY PROPOSAL #3 (CONT.)

Community Research References:

- 69% of survey respondents think it is important for Jewish organizations to reorganize and provide services in a more unified manner, over six times higher than the proportion of survey respondents who are opposed to the idea. (Survey Report - pages 55-57)
- Segments of the community that are most supportive of reorganizing to deliver programs and services to the community include current donors to the Birmingham Jewish Federation, those who see themselves as very involved in the Birmingham Jewish community and those who are members of synagogues.
- Individual interviews and survey respondents identified existing Birmingham Jewish institutions and program areas as being necessary and important for the future of community. (Survey Report - pages 37, 39, 49-52)
- Individual interviews demonstrated general consensus among key stakeholders that reorganization to deliver programs and services will strengthen the Birmingham Jewish community.



COMMUNITY PROPOSAL #4

RIGHTSIZING REAL-ESTATE TO DELIVER SERVICES

Birmingham's Jewish community has an extensive real-estate asset base, that in combination represents the largest physical asset that the Jewish community owns today. How we utilize our existing and potential additional real estate is an integral part of a vibrant, more sustainable future for the entire Birmingham Jewish community. Proposals regarding real estate recognize that there are multiple assets that need to be considered, in coordination with community partners who own and/or utilize these important community assets today.

- **Transitioning from a single campus:** The community survey made clear that a single location for all services is less important than other priorities, allowing for less “campus-centric” thinking.
- **Rightsizing the existing real estate:** Selling and/or partnering to fund a transition that right-sizes facilities that leads to more compelling and accessible services on the current campus, particularly focused on Jewish education and culture.
- **Satellite Facility:** Consider establishing a programming satellite if real estate becomes available, further distributing Jewish community services and providing accessible spaces in multiple parts of the city.
- **Reducing real-estate costs:** Leveraging existing and/or new real-estate to create affordable spaces for additional Jewish institutions who may want a presence on the current campus or future satellite(s) can provide a pathway for additional partnerships, collaborations, or affiliations in the future (see Community Proposal #3).

Timeline: Planning for real estate assets will take a significant amount of time and is largely dependent on recommendations regarding integration (Community Proposal #3). A timeline for planning may be required to fully vet and then begin implementation of a real-estate-based solution for existing assets. Additional real-estate-based opportunities may also arise during the planning and implementation phases for existing real estate, which should be addressed as they arise.

COMMUNITY PROPOSAL #4 (CONT.)

Community Research References:

- 69% of survey respondents think it is important for Jewish organizations to reorganize and provide services in a more unified manner, over six times higher than the proportion of survey respondents who are opposed to the idea. (Survey Report - pages 55-57)
- Survey respondents do not have a strong opinion about Jewish organizations in Birmingham being close to each other. 36% of survey respondents believe a single campus is important, a similar proportion to those who did not believe the proposal was important (33%), and a much lower proportion than other proposals presented in the survey. (Survey Report - pages 54-55)
- When including synagogues in a single campus proposal, an even smaller proportion of respondents believe it important (25%), the lowest overall level of support for any proposal included within the survey. (Survey Report - Page 54)
- Individual interviews and focus groups of key stakeholders and donors highlighted the belief that there is more real-estate than required to operate a Jewish community of Birmingham's size, and the belief that operating the current real-estate footprint is not sustainable.



COMMUNITY PROPOSAL #5

OUTREACH TO KEY DEMOGRAPHICS

The community survey conducted in summer 2021, combined with the demographic study completed in 2016 highlight that there are a large portion of Jewish families today who may not be engaging directly with Jewish community institutions. Focusing on outreach specifically to younger demographics will ensure a pipeline of participants and future lay leaders while maintaining core services for those engaged in community activities today.

Demographic focus: The following populations were highlighted as priorities for increased participation opportunities:

- ▶ **Jewish singles (engagement)**
- ▶ **Young families (engagement)**
- ▶ **Interfaith / multi-faith families (engagement)**
- ▶ **Older Adults / Seniors (service and social needs)**

Efforts to Meet These Priorities Include:

- Expand the Federation’s “Shalom Birmingham” program to collaboratively create a “welcome pipeline” that attracts new community members, provides concierge-based services that connect individuals to community resources and programs based on their interests.
- A digital funnel for anyone interested in joining the Birmingham Jewish community, meaningful networks to quickly establish connections with Jewish communal life, and clear entry points to welcome new community members are all incorporated into a welcoming pipeline and process.
- Understanding the changing social service needs and desires of a highly engaged, aging population in collaboration with CJFS will be critical to maintaining a vibrant Jewish community as well.

Timeline: Accelerate focus within the first 24 months, including elements that can be incorporated into the first 12 months.

COMMUNITY PROPOSAL #5 (CONT.)

Community Research References:

- Survey respondents were asked to identify demographic segments of the Jewish community needing additional programming. Three of the top four demographic segments identified by survey respondents were younger generations: Jewish singles (38%), interfaith couples/families (37%) and young couples/newlyweds (33%). (Survey report - page 53)
- Survey respondents were asked to identify demographic segments of the Jewish community needing additional programming. Younger generations self-identified the need for more programming at the highest rate, including Young couples/newlyweds (62%), interfaith couples/families (57%) and Jewish singles (53%). These results validate the broader survey responses that younger generations need more programming. (Survey report - page 52)
- Interviews with key stakeholders highlighted the need to focus on the next generation of Jewish life in Birmingham, with an emphasis on younger people while recognizing the needs of those we serve today.



Footnotes to the Community Proposals:

- It is the intention that any institutional restructuring be accomplished to retain the name, history and affiliations of the institution involved. They would operate as part of an integrated entity under a “House of Brands”. For example, the day school would remain as the “N.E. Miles Day School”.
- Addressing the mechanics of institutional integration and real estate issues involve numerous legal, accounting, personnel, and other challenges. It is the goal to address these important issues through shared intent and cooperation. We are not, however “reinventing the wheel” as other communities have dealt with similar changes and options should be available to satisfy our goals.
- Although focus was not on reducing costs, it is anticipated that integration can result in operational savings that can be employed to improve and expand services.
- Integration also affords the increased ability to adjust services to changes in community needs in the future.



Birmingham Jewish Federation Mission:

“To ensure a vibrant, inclusive Jewish community in Birmingham connected to Jews in Israel and around the world.”

FEDERATION PROPOSALS

The Birmingham Jewish Federation has a number of specific strategy choices that will strengthen the organization and the Birmingham Jewish community as it fulfills its role of convener, funder, and connector.

The strategies and key initiatives highlighted in this section reflect the areas where the Federation can expand upon current activities and pursue additional areas of focus to achieve each goal.

While the strategies identified here are feasible for the Federation to pursue independently, implementation of the Community Proposals greatly enhance its ability to increase the quantity and quality of Jewish programming through a unified services and program delivery model.



FEDERATION PROPOSAL #1: ENGAGEMENT / INCLUSION

CREATE JEWISH ENGAGEMENT FOR A LIFETIME THROUGH SOCIAL CONNECTION, VOLUNTEERING, LEARNING AND LEADERSHIP

Engaging the next generation of Jewish Life in Birmingham emerged as a top priority, which must be accomplished while recognizing those who are deeply engaged today, are more experienced and have been engaged in the Jewish community for longer periods of time.

Key achievement strategies in phase 1 and 2:

Programming for younger demographics: Federation programming focused on demographics highlighted in the community survey (young adults, multi-faith / interfaith families, young couples and young families).

- ▶ Existing programs to build upon include:
 - You Belong in Birmingham / Shalom Birmingham
 - Young leadership program(s)
 - PJ Library expansion through community connectors

Leadership Development: Create leadership development opportunities for Jewish community members at different stages of their leadership journey.

- ▶ Teen leadership reinvigoration through national best practices, such as applying to the Diller Teen Fellows program (<https://dillerteenfellows.org/en/>).
- ▶ Federation Young Leadership Program (young adult focus)
- ▶ Board training and development across organizations
- ▶ Regional and national leadership opportunities for local leaders

Missions, Travel, Israel Engagement:

- ▶ Develop a pipeline of missions to Israel and global centers of Jewish life.
- ▶ Implement Shlichim / Emissaries model in Birmingham, connected to the sister city of Rosh Ha'ayin in Israel (<https://www.jewishagency.org/shlichim/>).

FEDERATION PROPOSAL #1: ENGAGEMENT / INCLUSION (CONT.)

Timeline: Accelerate focus during the first 12 months, with additional elements that can be layered in over 24 months (such as additional travel opportunities). This proposal may have some limitations dependent on the level of short-term restrictions due to COVID-19.

Community Research References:

- Social programs and activities were the ranked as the most desired programming area by survey respondents (52%), followed closely by Traditional Worship (51%), Jewish Education for Children (47%) and Social Action (46%). (Survey Report - page 39).
- Survey respondents were asked to identify demographic segments of the Jewish community needing additional programming. Three of the top four demographic segments identified by survey respondents were younger generations: Jewish singles (38%), interfaith couples/families (37%) and young couples/newlyweds (33%). (Survey report - page 53)
- Interviews with key stakeholders highlighted local and global immersive Jewish experiences as a top priority for increasing engagement through programming in the future.

Relationship to Community Proposals:

- **Community Proposal #5** - Outreach, Focused on Younger Demographics
- **Community Proposal #1** - Jewish Community Members as the Primary Audience
- **Community Proposal #3** - Elevating Jewish Institutions Through Integration



FEDERATION PROPOSAL #2: MAXIMIZING RESOURCES

STRENGTHENING THE BIRMINGHAM JEWISH COMMUNITY ACROSS FIVE AREAS OF IMPACT PRIORITIZED BY THE COMMUNITY

- ▶ Jewish education at every stage of life
- ▶ Addressing safety, security and Anti-Semitism issues for the Jewish community-
- ▶ Social services and emergency needs of the Jewish community
- ▶ Jewish culture, identity and outreach
- ▶ Support of, and connection to Israel

Key achievement strategies in phase 1 and 2:

Funding Prioritization: Focusing on Jewish Education, emergency social service needs of community members and addressing Anti-Semitism are of particular importance, based on the community input provided (see Community Proposal #1).

Grant funding acceleration: Increase the proportion of funding that is grant-based to directly focus on funding community priorities, including incorporation of unrestricted and designated fundraising into an integrated funding process that maximizes impact for the community (see Community Proposal #2 for more detail).

JCRC expansion: Increase the JCRC presence to focus on providing a voice for Jewish community values and causes, address Anti-Semitism in the community and work in conjunction with security coordination.

Security: Coordinate security for Jewish institutions throughout the community, including securing resources, advocating for, and encouraging investment in security for the Jewish community. A seamless community security experience is made easier and safer through integration of Jewish institutions (see Community Proposal #3).

Immersive Jewish Education and Culture Experiences: The Federation is uniquely positioned to invest in and convene immersive educational experiences, including youth groups, overnight camp, and Israel experiences for younger demographics. In particular, consideration of the establishment of a Bureau of Jewish Education (see Community Proposal #3) could provide a strong pipeline of candidates for these programs.

FEDERATION PROPOSAL #2: MAXIMIZING RESOURCES (CONT.)

Timeline: Elements of this proposal are currently in process and the balance should be commenced by the Federation within 12 months although full implementation may require 24 months or longer depending on financial resources.

Community Research References:

- Six in 10 (or more) survey respondents said it is very important that the Birmingham Jewish Federation fight Anti-Semitism (76%), address community safety and security (65%) and fund emergency needs (61%). (Survey report - pages 68-69)
- Jewish Education was consistently in the top three programming priorities for survey respondents, individual interviews and focus group participants.
- Various interviewees and focus group respondents highlighted the specific need to expand Jewish relations through JCRC.



FEDERATION PROPOSAL #3: FUNDING / PHILANTHROPY

EXPAND ANNUAL FUNDING AND FOUNDATION ASSETS UNDER MANAGEMENT BY 50% OVER THE NEXT FIVE YEARS AS PART OF MOVING TOWARDS A UNIFIED GIVING MODEL.

Sustainable funding streams for Jewish institutions across Birmingham are critical to ensuring a vibrant Jewish community in the future, without which the full programmatic and impact elements of the strategic plan are much less likely to be achieved.

Key achievement strategies in phase 1 and 2:

Federation and Foundation Integration: An expansion of philanthropy requires a fully integrated and seamless philanthropy model that is donor-centric. This includes funding from all streams on an annual basis, inclusive of, but not limited to the annual campaign.

Development team expansion: Hire development professional(s) to create a more sustainable philanthropy pipeline for the Jewish community. The extent of hiring abilities is dependent upon the integration of Federation and Foundation resources (see Community Proposal #2).

Grant-writing capabilities: Dedicated grant-writing expertise provides an open door to additional sources of revenue beyond the local Jewish community. Grant writing expertise can be critical for national Jewish funders, as well as secular funding opportunities (e.g. Dept. of Homeland Security for local security grants, or to support expansion of JFS services, etc.).

Philanthropy Pathway Expansion: Create additional opportunities for donors to fund community needs in the future. Specific tactics to consider include giving circles, capital campaigns, designated giving opportunities, and planned giving tools that align with funding priorities.

National Programs: Leverage national philanthropic partnerships that can create matching funds to deliver impact locally. Examples already being executed include PJ Library, with many more funding sources available for consideration (e.g. PEJE, Onward Israel, Wexner Foundation, Schusterman, Foundation for Jewish Camp, Diller Foundation etc.).

FEDERATION PROPOSAL #3: FUNDING / PHILANTHROPY (CONT.)

Timeline: Over the next 24+ months, elements of this proposal will be implemented by the Federation with priorities dependent on the resources made available and the implementation timeline of other proposals.

Community Research References:

- 56% of survey respondents think it is important for Jewish organizations to provide a unified giving structure to support Jewish institutions. For every 3 people who felt this was important, only one was opposed to the idea. (Survey Report - pages 55, 58-59)
- Segments of the community that are most supportive of a more unified giving structure to support institutions include current donors to the Birmingham Jewish Federation and those who believe Birmingham to be a vibrant or somewhat vibrant place to live.
- Compared to non-donors, current donors are more supportive of BJF's role as a convener and centralized resource. They are more likely to think it is important that BJF act as the central fundraiser; make allocation decisions for Jewish organizations; fund emergency needs; convene and plan to address problems and opportunities; and support Jewish agencies in times of need. (Survey Report - page 70)
- 97% of survey respondents plan to maintain or increase their charitable giving, while 73% would consider or already have charitable giving in their estate plan and wills today. (Survey Report - pages 96-99)



CONSIDERATIONS FOR FUTURE YEARS

The following areas of focus represent additional opportunities for consideration, following the successful implementation of phases 1 and 2 of the strategic plan.

Volunteerism: Developing a coordinated local volunteerism effort can engage a broader cross-section of community members. A number of examples exist nationally that can become models for the Birmingham Jewish community (Chicago: <https://www.juf.org/TOV/>, JVC Baltimore: <https://jvcbaltimore.org/>, Volunteer Match, Besa <https://www.besa.org/>). Volunteerism aligns with survey respondents' desire to have additional social action programming and social connections, consistent with national philanthropic research and Jewish community efforts across the country.

Older Adult service expansion: Funding of service expansion for older adults in collaboration with CJFS will help to address the accelerating needs of an aging population, while continuing to engage this critical cohort of involved Jewish community participants. Engaging older adults through Education, social activities and traditional worship were all prioritized by older adults, while a significant proportion also identified the need for social services to support an aging population.

Community planning function: Establishing a community planning function will help to ensure that we are looking beyond the short to medium-term when making decisions to strengthen our Jewish community.

Shared Services: A shared service center for back-office services can help to create scale for back office services, leveraging financial resources and human capital to serve the entire Jewish community in a cost-efficient manner.



KEY INITIATIVE IMPLEMENTATION: COMMUNITY PROPOSALS

Holding ourselves accountable as a community, while balancing the use of limited resources requires an understanding of how we plan to sequence activities that demonstrate progress towards a collective vision for the Birmingham Jewish community.

KEY INITIATIVE MILESTONES	Phase 1				Phase 2			
	Q1	Q2	Q3	Q4	Q5	Q6	Q7	Q8
KEY RECOMMENDATION #2: INTEGRATING PHILANTHROPY THROUGH A SINGLE ORGANIZATION								
Agreement for integration	→							
Professional team integration		→						
Governance transition			→					
KEY RECOMMENDATION #3: ELEVATING JEWISH INSTITUTIONS THROUGH INTEGRATION								
	Q1	Q2	Q3	Q4	Q5	Q6	Q7	Q8
Shared understanding with each institution through education	→							
Develop an agreement (MoU) demonstrating commitment to integration, with signature from agencies	→							
Establish a leadership structure to implement and direct operations		→						
Governance simplification and transition				→				
Coordination of Jewish Education implementation						→		
KEY RECOMMENDATION #4: RIGHTSIZING REAL-ESTATE TO DELIVER SERVICES								
	Q1	Q2	Q3	Q4	Q5	Q6	Q7	Q8
Establish real-estate planning group	→							
Agreement with agency partners to plan for real-estate changes together		→						
Real-estate planning activities			→					
Propose real-estate solution for existing assets						→		
Begin real-estate transition activities							→	
COMMUNITY PROPOSAL #5: OUTREACH TO KEY DEMOGRAPHICS								
	Q1	Q2	Q3	Q4	Q5	Q6	Q7	Q8
Expansion of existing programs (e.g. Shalom Birmingham)	→							
Expanded engagement for interfaith families, young couples			→					
Understanding needs of engaged, aging community members				→				
Welcome pipeline that attracts new community members				→				

KEY INITIATIVE IMPLEMENTATION: FEDERATION PROPOSALS

KEY INITIATIVE MILESTONES	Phase 1				Phase 2			
	Q1	Q2	Q3	Q4	Q5	Q6	Q7	Q8
GOAL: ENGAGEMENT/INCLUSION								
Younger demographic programming expansion: YBIB, Shalom Birmingham, PJ Library expansion through connectors								
Develop a pipeline of missions to Israel and global centers of Jewish life								
Federation Young Leadership program (young adult focus)								
Teen leadership program reinvigoration								
Implement Shlichim / Emissaries model in Birmingham, connected to the sister city of Rosh Ha'ayin in Israel								
Board training and development opportunities								
GOAL: MAXIMIZING RESOURCES								
Security: Coordinate security for Jewish institutions throughout the community								
JCRC expansion: Increase the JCRC presence to focus on providing a voice for Jewish community values and causes, address Anti-Semitism in the community								
Grant funding acceleration: Increase the proportion of funding that is grant-based to directly focus on funding priorities								
GOAL: FUNDING/PHILANTHROPY MODEL AND NEEDS								
Develop team expansion								
Federation and Foundation integration (see recommendation #2)								
Philanthropy pathway expansion: Create additional opportunities for donors to fund community needs in the future								

MEASURING SUCCESS

A clear understanding of the metrics that will help to define the Federation's success over the coming years can be found below. Depending on the implementation of community recommendations, these metrics may evolve or change depending on future integration between organizations.

Goal	Potential Measure
Engagement / Inclusion: Create Jewish engagement for a lifetime through social connection, volunteering, learning and leadership	Young Demographic participation (25-40) (#)
	Leadership program participants (# - all stages of life)
	Community members traveling to Israel (#)
	PJ Library market share (%)
Maximize resources to strengthen the Birmingham Jewish Community across five areas of impact prioritized by the community	Allocations provided through grants processes (%)
	Funding for community priorities (\$)
	Households participating in Federation programs (#)
	Followers across platforms (e.g. Meta, LinkedIn, TikTok, #)
	Security threat and physical assessments provided (#)
Funding / Philanthropy Model and Needs: Expand both annual federation funding and foundation legacy gifts by 100% over 5 years as part of moving towards unified community fundraising	Total financial resources raised for the Jewish community (\$)
	Number of new donors to the Jewish community (#)
	New planned giving commitments (# / \$)
	Active Donor Advised Funds who gave a gift (#)
	Planned gift commitments to the Jewish future (\$ and #)