

## **The Birmingham Jewish Community and Federation Strategic Plan**

We want to bring you, our Birmingham Jewish Community, up to date on the progress toward implementing our Strategic Plan presented on March 25, 2022. Like the Plan, this report is broken out into two sections: Community and Federation.

### **The Community Plan**

Our Community Plan contained five specific proposals:

- Jewish Community Members as primary recipients of services
- Integrating philanthropy through a donor-centric system
- Strengthening Jewish organizations through integration
- Rightsizing Jewish Community real estate
- Expanding outreach to key demographics

The goals of these proposals are, to varying degrees, interdependent. For example, integrating philanthropy and expanding outreach are more easily obtained if relevant institutions are integrated. But all goals are viewed in light of the first, guiding goal, Jewish Community members as primary beneficiaries. And, for now, pending integration, expanding outreach is a primary focus of our Federation.

The Plan directed that integration initially focus on three institutions:

- The Birmingham Jewish Foundation
- N.E. Miles Jewish Day School
- Levite Jewish Community Center

The following is our progress to date for each institution:

#### **The Birmingham Jewish Foundation**

Not surprising, because of their historic close working relationship and the fact that The Birmingham Jewish Foundation is a supporting Foundation of The Birmingham Jewish Federation the most progress towards integration has been with the Foundation. Building upon an already successful longstanding integrated financial team the Foundation was the first to formally commit to a Memorandum of Understanding (MOU) working toward integration. A preliminary term sheet is under discussion. Those terms include maintaining the separate identity and tax status of the Foundation with a separate board; honoring all donor commitments; and all administration and staffing being provided by the Federation pursuant to a formal Administrative Services Agreement. Our target date for integration is December 31, 2022.

#### **N.E. Miles Jewish Day School**

The Day School has also responded positively to pursuing integration with the Federation through an MOU approved by its Board. The Day School is an operating entity with 17 employees, has an annual budget of approximately \$1 million and its own facility. Its student body is approximately 70% of capacity with current overhead. Our next step, working with lay and professional leadership of both the Day School and the Federation, will be to develop an operational and financial model that integration can support. It will include consideration, as has been suggested, of a Community "Bureau of Jewish Education" focusing on all levels of Jewish education at all phases of life. We believe this process may require professional third-party consultation.

## Levite Jewish Community Center

The LJCC is the largest of our Jewish organizations with an operating budget of in excess of \$6 million. Our research indicates its formation in 1906 was premised on providing a facility for broad development of Jewish men and women and its currently stated mission is “to enhance Jewish identity by providing programs and activities that promote cultural enrichment, cultivate educational development and provide for the well-being of its members.”

However, over its decades of existence, the LJCC’s use has evolved to “a vibrant community center that bridges the Jewish and non-Jewish communities and embraces all people.” We have asked for details of the Jewish use of and membership at the LJCC. This is particularly important in light of the Community’s focus on the Jewish Community as the primary recipient of services, even though we recognize the benefit of the LJCC’s involvement in our broader community.

We are having conversations with the LJCC leadership regarding collaboration toward the implementation of the Strategic Plan. We will continue to keep the community posted on these discussions.

### Integrating Philanthropy

Although one natural benefit of integration will be more donor-centric community fundraising, we, the chairs of the Strategic Planning implementation, recommend to the Federation Board and the community as an interim step before embarking on a single community campaign, to adopt a policy that organizations that receive financial support from the Federation be subject to the following:

- Limited to membership and/or “friends campaigns” and one annual fundraising event
- Scheduling of fundraising events be coordinated through the community calendar to avoid conflicts
- Event charges reasonably related to costs would not be impacted.

Respectfully submitted,



Lisa Engel



Joel Piassick

## **The Birmingham Jewish Federation Plan**

The Federation's portion of the Community Strategic Plan brought forth a new vision of "One Community empowering Jewish journeys, driven by tradition, innovation and sustainability." As well as an enhanced mission statement "To ensure a vibrant, inclusive Jewish community in Birmingham connected to Jews in Israel and around the world." In addition to the community proposals, the Federation outlined three additional proposals to achieve our goals which are provided in the updates below.

### **Creating Jewish Engagement for a Lifetime**

In the plan there are three key strategies for achieving this goal. Programming for younger demographics, Leadership Development and Missions, Travel and Israel Engagement.

- Through our PJ Library we have expanded our offerings to partnering with other Jewish organizations throughout Birmingham to bring programming to the youngest member of our community be it at a park, the LICC or their place of worship.
- Additionally, we have expanded our Young Jewish Philanthropy programming for ages 9-13 through partnerships with each of the synagogues. We also proudly financially support our local Hebrew High School Program, Keshet, as well as fund and administer BBYO here in Birmingham. We have begun incubating new additional programming in this area that will be rolled out in calendar year 2023.
- In 2022 a new Young Jewish Leadership Program was offered to young adults with 40 applicants for 20 spaces. This program meets monthly to learn not only about Jewish Birmingham, but also with local and national organizations important to the community. There are also classes taught by community members on board service. This program will culminate in April of 2023 with a group trip to Israel and each participant has signed a social contract which guarantees their service on a board or committee of a Jewish organization following this program. We are in the process of forming a steering committee to offer more broad leadership development in the way of additional skill set building such as public speaking, presentations and the use of practical technology tools.
- There will also be an opportunity for our young adults to participate in Jewish Federation of North America's Young Leadership Cabinet as well as other national programs still under consideration. The Federation does not believe leadership development ever ends and is also looking to launch programs during calendar year of 2023 that will involve all age groups, knowing a significant part of Generation X has yet to be trained by our local Jewish community.
- Missions, travel and Israel Engagement remain a top priority. During 2022 and 2023 the Federation will send close to 50 people on Israel experiences through Momentum for Jewish Mothers and our Young Leadership programming with an additional mission being eyed for the second half of 2023 for those who wish to return to Israel.
- We have hired two additional part time staff members to concentrate on Israel. One to run our partnership program with our sister city Rosh Ha'Ayin as well as our Shin Shinim programming, two Israeli teenage emissaries that will be here for community programming and engagement August 2022-August 2023. The other staff member will be concentrating on bringing Israel advocacy and educational programming to the community as well as working on expanded travel opportunities, not only to Israel but Jewish centers in the United States and around the world.

## **Strengthening the Community Across Five Impact Areas**

The Jewish Community of Birmingham Identified five key areas of prioritized impact: Jewish Education at every stage of life; Addressing safety, security and Anti-Semitism; Social services and emergency needs of the Jewish Community, Jewish Culture, identity and outreach, and the Support of and connection to Israel.

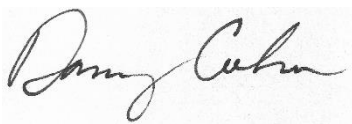
- Since the introduction of this plan, funding prioritization and grant funding acceleration is underway with an accelerated grant process occurring for all agencies tied to these areas of impact.
- Our JCRC capabilities have expanded through the addition of our staff member concentration on Israel and we have hired a full time Regional Security Director for the entire Jewish Community who began in May of 2022.
- Through the Community plan, the N.E. Miles Jewish Day School has agreed to pursue integration which will allow us to better offer additional educational opportunities for our community at the Abroms Center for Life Long Learning which we are in the process of strategizing additional offerings for the community.
- Additionally, we are partnering with Collat Jewish Family Services on focus groups for the Baby Boomer generation to see what is wanted by way of education and additional Jewish experiences from that segment of the population. We look forward to bringing you additional updates on Education and Cultural experiences in the coming year.

### **Expanding Annual Funding and Foundation Assets Under Management by 50% over the Next Five Years**

The Birmingham Federation has begun working towards this strategy during the 2022/2023 campaign where donors are being asked to consider a 10 percent increase to their annual campaign pledges. Pledges alone however will not get us to this goal. Through the integration with The Birmingham Jewish Foundation we will be better poised to operate as a singular donor centric philanthropic unit with the ability to raise additional endowment funds, apply for more grants and have a deeper reach into the community for corporate sponsorship and philanthropy. Additionally, we are taking advantage of matching grants from various Jewish institutions nationally such as the Harold Grinspoon Foundation and JFNA (Jewish Federations of North America) which help towards our overall financial resource development outside campaign dollars to further benefit the community. This strategy will continue to progress and evolve as more opportunities become available over the next five years.

We are extremely pleased to be able to report such momentum towards achieving the goals and strategies that were determined based on community data. We are excited to continue our progress over the next 24 months as our community vision evolves into a reality.

Respectfully submitted,



Danny Cohn



Amy Saag