

# Strategic Plan Status Report

October 2024

*This Report Follows the Dual Proposal Structure of the Strategic Plan: Community & Federation*

## Community Plan Update

*From Co-Chairs of Strategic Plan Implementation: Lisa Engel and Joel Piassick*

### INTRODUCTION

We have reached a strategic crossroad in efforts to implement the community proposals of the [2022 Strategic Plan](#) for our Birmingham Jewish Community and for our role in that process. Although the Strategic Plan process was sponsored by the Birmingham Jewish Federation and we were selected by the Federation to coordinate implementation, we have always viewed our role as representing the Jewish Community's goals as contained in the Strategic Plan, not Federation or any of our Jewish organizations.

We know that many members of our community have expressed their frustrations that the process has been too slow. This report should explain what has been accomplished, what has not been accomplished, why, and a concept for a new beginning. Please take time to read our final report.

As a reminder, the Strategic Plan's vision was "one community, empowering Jewish journeys driven by tradition, innovation, and sustainability." Of its four goals, "Reorganization/Realignment: Increase the quality of Jewish programming through a unified service and program delivery model" was deemed to be the necessary first step in implementation. It contemplates "a single team working on behalf of the community" with "one professional leader" and the Birmingham Jewish community as the primary (though not exclusive) beneficiary of services. The spark that generated the development of the Strategic Plan was the "Roadmap", developed by 15 members of our community under 40. The cornerstone of the Roadmap was one unified Jewish Birmingham focused on and scaled to the needs of our Jewish Community. Following a community survey, the Roadmap's general concept of "integration" was translated in the Strategic Plan into specific proposals and goals which, if met, would result in the vision of the Roadmap becoming reality. Therefore, the

initial focus of implementation of the Strategic Plan was integration of the Federation, the Foundation, LJCC, and the Day School.

#### **SINCE OUR LAST REPORT**

##### The Foundation

The Birmingham Jewish Foundation and the Federation entered into a formal Administrative Services Agreement that integrated their operations, while preserving the independent status of the Foundation in order to maximize asset protection and honor individual donor commitments.

##### The Day School

As we previously reported, initial discussions with lay leadership of the Day School generated agreement that a first step towards integration was to obtain a study by Prizmah (the organization of US Jewish Day Schools) to compare the elements and issues facing the Day School with others of similar size. That report was completed on June 23, 2023 and advised that:

- Outsourcing administration and financial management could result in significant savings.
- Admission functions should not be outsourced.
- Most teachers should be full-time (which is the case at the Day School).
- Expenses are generally increasing faster than revenue and increased enrollment does not always result in reducing costs per student.
- The Durham-Chapel Hill, NC Federation is assuming operations of their community's Day School, which can provide guidance.
- Parents of students must be kept up-to-date on integrations discussions to insure trust.
- The Day School's tuition is less than its peers.

Following receipt of the Prizmah report, it was determined in discussions with Day School leadership, that the next step should be defining a reimagined Day School that will provide a first-rate education to an increased student count and that is long-term financially sustainable, combined with consideration of how integration with the Federation could accelerate and facilitate that goal. A schedule of working meetings then ensued that discussed issues related to the operations of the Day School. Day School leadership continued to express general support for integration, but discussion of concrete terms of integration have not occurred.

### The LJCC

In early 2023, the LJCC and the Federation Boards adopted a plan to jointly work toward integration, taking a first step, while recognizing that a number of issues still remained. The substance of that plan is set forth in the following resolution paragraph adopted by both Boards:

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*In support of movement towards integration, the BJF would assume the responsibility to develop, expand and implement Jewish programming at the LJCC. BJF, in consultation with the LJCC Executive Director, would hire a dedicated staffer to perform these services under the supervision of Danny Cohn. Implementation of the programming would be in coordination with the newly formed Jewish Programming Committee and utilization of LJCC facilities would be in coordination with the LJCC Executive Director or her designee. He or she would have an office at LJCC. Costs of the staffer and programs initiated by him/her would be allocated against but would not exceed the annual BJF allocation to LJCC. (Allocation of these costs would not begin until the person is actually on the BJF payroll. Until such time, BJF will continue to pay LJCC its monthly allocation.) It is the intent that these functions transition to LJCC through the integrations pursuant to*

*the Strategic Plan. The implementation of Jewish Programming at the LJCC will be periodically reviewed by representative of the Federation and LJCC.*

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During that time the LJCC formed a lay committee to advise it on Jewish programming. Over that Summer, The Federation proposed three individuals to serve as the Director of Jewish Life and Learning, none of which were deemed to be a good fit by LJCC leadership. Ultimately, on October 5, 2023, the LJCC Board adopted a resolution rescinding its earlier commitment, stating:

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*The LJCC Governing Board believes that the position of Director of Jewish Life will be most successful if the position directly reports to the executive director of the LJCC and serves as an employee of the LJCC. Implementation of Jewish programming will be in coordination with the BIF and with the Jewish Programming Committee comprised of members who represent all of our Jewish community organizations. This arrangement provides greater clarity with regards to reporting structure, payroll, benefits, vacation, allocation, organizational policies, and trust among LJCC employees.*

*The change of structure for the Director of Jewish Life is not meant to communicate that the LJCC is taking a step back or away from integration. The LJCC remains committed to providing Jewish programming to its members and to the general community.*

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During this period, between the two LJCC resolutions, Federation leadership and LJCC leadership held several meetings, sometimes including involvement of David Kaplan. We were not engaged in these discussions and had no power or authority to either aggressively push the process forward, or move to a “Plan B” of partial integration. Additional interactions with the LJCC failed to move the process forward.

Ultimately, the LJCC directly hired a Director of Jewish Life and Learning. Currently there are two new individuals sharing those responsibilities.

At this point, while cooperative efforts continued amongst the agencies, it was clear to us that implementation of the Community portion of the Strategic Plan was at a standstill.

#### **FEDERATION LEADERSHIP ACTIONS**

With forward movement on implementation of the Strategic Plan at a standstill, Federation leadership determined to reach out for advice and assistance from David Kaplan, who had consulted with the committee that developed the Strategic Plan. Under consideration was whether we should continue to lead the integration process and whether the integration process should continue. Leadership ultimately determined, in consultation with David Kaplan, to retain David to study the feasibility of implementation of the Strategic Plan and report to a new committee, which would be charged with determining the future of integration for our Jewish Community.

The New Committee, formed by Federation, was composed of representatives selected independently by the LJCC, the Federation, the Foundation, and Day School. We were ex-officio members of the New Committee, which met with David Kaplan for several hours on July 10, 2024 to receive his report and discuss its findings.

#### **THE DAVID KAPLAN REPORT**

David Kaplan, was tasked with interviewing the Boards of Federation, the LJCC, the Day School, and the Foundation, and separately the individual professional directors of each organization, with the goal of advising on the status of implementing the Strategic Plan. This he did during the period of June 3<sup>rd</sup>-4<sup>th</sup> and delivered his report to the New Committee on July 10, 2024.

David's report\*, after listing nine findings, concludes that:

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*While it remains the recommendation of Panoramic Strategy that the Birmingham Jewish Federation and Foundation, Levite JCC, and N.E. Miles Day School integrate under the principles outlined in the Strategic Plan, the current conditions and attitudes in the Birmingham Jewish Community are not sufficient for successful integration to place at this time.*

*It is Panoramic Strategy's recommendation that a small group of lay leaders from each agency convene to determine if an efficient path to integration exists. In the absence of a clear answer that overcomes the present conditions and key findings in this report, it is not recommended that integration continue to be pursued at this time.*

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\*Copies of David Kaplan's full report are available at the Federation office, upon request.

#### **THE JULY 10<sup>TH</sup> MEETING**

At the July 10<sup>th</sup> Meeting, David Kaplan presented his findings and recommendations. An open, candid discussion, with numerous questions, followed the presentation, concluding with a unanimous decision that: the path to integrations should be pursued; that the process should be managed by the constituent organizations as equals; that David Kaplan should continue in an active role to guide the process; and that the organizations shall equally share the cost moving forward.

The above agreement has been approved by each constituent organization's Board. The next steps will be for members of the New Committee to determine a path forward to integration, a process David Kaplan suggests could take one to two years.

We were asked by Federation leadership to lead this new effort on behalf of Federation. We declined for several reasons, but most important was our opinion that the New Committee needed to move forward with an open vision, not necessarily tied to the Strategic Plan. And, as made clear by David's report, Federation could not be deemed to be leading the new endeavor.

### **CONCLUSION**

We still believe that integration as set forth in the Strategic Plan is in the best, long-term interest of our Jewish community. We are obviously disappointed in the inability of our organizations to support the Community proposal of the Strategic Plan, but are hopeful and supportive of the new initiative. We understand that this, our final report, may raise questions and concerns. We urge everyone in our Jewish community to join us in looking forward to the long-term goal of integration as the goal of our Jewish community. It has been our privilege to work on this process over the past several years. Thank you.

### **Federation Update**

*From Danny Cohn, CEO of The Birmingham Jewish Federation & Foundation*

The BJJF is continuing to build upon the strong momentum of the Strategic Plan. It is thrilling to see us advance towards our vision statement of "One community empowering Jewish journeys, driven by tradition, innovation and sustainability" while accomplishing and expanding upon the goals set forth for the Federation in the plan. The plan laid out three specific proposals: Creating Jewish Engagement for a Lifetime Through Social Connection, Volunteering, Learning and Leadership; Strengthening the Birmingham Jewish Community Across Five Areas of Impact Prioritized by the Jewish Community; and Expanding Annual Funding and Foundation Assets Under Management by 50% over the Next Five Years as a Part of Moving Towards a Unified Giving Model.

## Creating Jewish Engagement

Regarding Jewish Engagement we expanded our PJ Library Offerings through our various community organization partnerships including a reinvigorated Shalom Baby with programming for those parents with children three and under. We are also advancing programming in partnership with the NE Miles Jewish Day School, challenging children with STEM programming. Additionally, we have added an additional part time professional to help with our growing PJ Library efforts. Our Young Jewish Philanthropy grew through our partnerships with Temple Beth-El and Temple Emanu-el, and our Young Leadership program seeded leadership on agency and synagogue boards with three of our cohort chairing our 2025 BJF Annual Campaign. Our second cohort begins in October of 2024.

The Federation remains committed to ensuring a vibrant BBYO for our Young Teens and also hosted to two Schlichim, Israeli emissaries, last year. Additionally, we have funded national leadership opportunities and trips to Israel for six area teens this past summer.

Over the last two years, through various trips and missions, the Federation has sent more than 60 individuals to Israel, most notably through our new partnership with MOMentum. The MOMentum Year-Long Journey empowers women to connect to Jewish values, engage with Israel, take action, and foster unity, without uniformity. It includes a profound, personal 8-day experience in Israel, during which women explore the Jewish homeland, take in inspiring Jewish wisdom, and join a global Jewish sisterhood. Back home, these women channel their energy and passion personally, professionally, and communally, and continue their Jewish journey through educational and leadership programs. We currently have a women's and a men's momentum trip planned for 2025. Additional programming will continue to roll out in 2025 to create even stronger engagement opportunities in our community.



## Areas of Impact

The first of the five priority areas were strengthening Jewish Education at every stage of life. In addition to the PJ Library and Young Jewish Philanthropy programs, the Federation is a proud funder of the Hebrew high school program, Keshet, and the Alabama Holocaust Education Center as well as a major funder of the N.E. Miles Jewish Day School.

We addressed the rise of Antisemitism and Security through our partnership with the Secure Community Network and the hiring of our Regional Security Advisor, who actively works with all of our agencies and synagogues to ensure the highest level of safety, training and security is available to our constituents and congregants. The Federation sponsors community security trainings as well as coordinating security needs for any Jewish related event. A new community security reporting mechanism has been established through the security portal of [bjf.org](http://bjf.org). We are currently interviewing candidates for the open Regional Security role and will have more information in the coming weeks.

The Federation has invested in its staff and has hired a full time Director of the Jewish Community Relations Council. In addition, we also have a community representative with a certificate in combatting Antisemitism from Spertus College in Chicago which increases our capacity for programming in this arena. We also continue to work hand in hand with our public-school partners as an educational resource, ensuring that no testing or events are held on major Jewish holidays. In 2025 expanded programming in advocacy, community building and combatting Antisemitism will be offered through our JCRC.

This year we have met the emergency needs for Israel raising an additional \$1.6 million for the Israel Emergency Campaign. This is in addition to the close to \$200,000 granted towards the Israel World Jewry Bureau. We will continue to monitor the needs of our people both and home and abroad to assure we are meeting the call.

## Annual Funding

While we still seek to expand our annual giving, we are proud of the newly integrated entity with the Foundation that has better allowed us to serve our donors and agencies. Through this agreement a higher level of stewardship as well as philanthropic opportunities for our donors has been presented to the community. Through this new integration we have been able to double the amount of grants Federation provides to our Jewish agencies and programming partners to better reflect the current needs of our Jewish community as well as modernize our backend operations.

More information on the Federation's successes can be read in [this year's impact report](#). It is because of your generosity both in time and dollars that we have been able to accomplish so much in just over two and a half years. I look forward to updating you on more community successes as we begin to plan a path to continue to build upon and expand Federation and Foundation impact both at home and abroad.