

## UJC of MetroWest NJ - Strategic Goals – 2010-2011

### Goal

### Responsible Leadership (L) and Staff (S)

#### 1. Address JCC Financial Situation

Financial Oversight Committee (L)  
Executive/COO, CFO (S)

The JCC is a major gateway institution for our community. We must work with the JCC to help stabilize its financial position.

*Status: The Financial Oversight Committee continues to work closely with JCC, whose financial condition remains fragile. The Executive Committee extended additional credit to JCC in June 2010 subject to additional conditions. UJC MetroWest and JCC established joint task forces to explore issues relating to revenue enhancement and the delivery of fitness services. Recommendations from these two task forces are being explored. A Chief Implementation Officer has been engaged to review the operations of the JCC and implement the task force recommendations.*

#### 2. Develop and Implement Process of Collaboration Efforts which may lead to Institutional Consolidation With Central New Jersey

Exploratory Committee (L)  
Executive (S)

A committee has already been constituted with members of both communities to evaluate ways in which we can combine forces, with the possibility of consolidation, if warranted.

*Status: Joint Exploratory Committee established, co-chaired by Steven Klinghoffer and Bob Kuchner, immediate past president of Central. Four meetings convened. A subcommittee has been formed to develop potential collaborations on new initiatives benefitting both communities to take place on August 30, 2010.*

#### 3. Restructure Planning & Allocations Process

UAC/LAC (L) and Planning & Allocations (S)

Launching a new Planning and Allocations process. Employ its new program area focus to create a more unified and compelling approach to federation messaging. The new Planning and Allocations process for the local community will emphasize support of programs and services that meet MetroWest's needs in addition to unrestricted funding that supports agency operations. This new orientation will make available to campaigners more specific information about how local dollars are allocated along the lines of a particular donor's interests (i.e., older adult services, or Jewish education for teens) and will yield more compelling stories for marketing purposes about how UJC affects lives through the programming it supports.

*Status: Gradual phase-in will continue over the next two years. Equal weight will now be given to both broad communal planning issues as well as allocations recommendations.*

#### 4. Launch MetroWest Tomorrow

Jewish Community Foundation (L,S)

Launch MetroWest Tomorrow, an effort to supplement the unrestricted endowments created through the Lester Society by creating programmic/restricted endowments that will address an array of community needs, today and tomorrow. Complete quiet phase of MetroWest Tomorrow fundraising. Hold public launch event in spring 2011 with following issues resolved: at least \$50 million in lead gifts and commitments, formation and operation of MWT advisory committee, implementation of donor recognition installation in Whippany atrium.

*Status: Initial FY10 asks complete. Results include Cooperman Fund for Our Jewish Future, \$5 million commitment to an endowed fund that will benefit Jewish camp, Birthright Israel and Jewish mitzvah projects, among other things. Other asks are pending, including \$10 million ask for a named family fund to benefit Israel and Overseas initiatives as well as a potential 8-figure naming gift for a MetroWest community Jewish day school. All of this is in addition to existing 6 and 7-figure gifts and commitments to programmatic endowments. Initial campaign and marketing documents are complete. A working group composed of key lay leaders and professional staff has convened and discussed key issues regarding prospective donor families and donor recognition displays. Formal, public launch for the campaign is being planned for spring, 2011.*

**Goal**

**Responsible Leadership (L) and Staff (S)**

**5. Pass the Torch to the Next Generation**

YLD – Leadership Development (L, S)  
IPC (L, S)  
The Partnership (L, S)

Continue to build on the strong foundation developed for teens, young adults (Borinsky), Campaign workers (Epstein) and Wexner/Waldor Fellows. Develop a 5 year plan on the role and scope of Leadership Development in MetroWest by end of 2010. Outreach effort to Birthright Israel Next constituents and other twenty somethings.

*Status: The 8th annual Borinsky class will be running again this year. As we did last year, there will be a Borinsky A.M. for women who are available during the day and the traditional Borinsky P.M. Upon completion of the program many will be taking positions on various community boards and committee roles both in and out of UJC. The Epstein Leadership Mission will be taking place again this year. We are excited for the new class that is motivated to see our partnership agencies and hone their fundraising skills. The JWI-Wexner Heritage Program class completed its second year of study and that ended with a week long institute in Utah this summer. Wexner class members are making their mark throughout the Federation system, in Jewish camping, in our day schools, synagogues, AIPAC and more. YLD is holding their 3<sup>rd</sup> Annual We Bring the Bar, You Bring the Mitzvah. This event has been successful the past two years to bring in new folks; Borinsky recruits and sets the tone for a great year. The Real Estate Executives (REX) is up and running and the chairs are working on upcoming events for the fall. The group is growing and thriving. YLD will be holding a Rock n' Wrap event on November 21<sup>st</sup> as a joint program with the JCC and Morris County Connection. IPC is working with BRI Next to reach BRI alumni.*

**6. Re-build UJA Campaign to Pre-Economic Crisis Level**

UJA Campaign (L,S)

Even as we conduct the daily routines for the 2011 UJA Campaign, we must evaluate and implement best approaches, based on best practices, to restore lost or decreased gifts to pre-crisis Campaign levels and secure new, quality gifts. Campaign Goal for 2011 is \$21 million. Increase number of donors who participate at \$1,000+ level and increase number of face to face solicitations by 20%.

*Status: Established Separate "Skips" chart as part of Pace Report to monitor progress. Skips Project has to date recaptured 443 donors gifts whose pledges total \$189,378. UJC Board members have volunteered to follow-up with 74 donors who last gave \$53,755 in 2008, and they have so far raised \$7,640 from 13 of these donors. (needs updating)*

**7. Initiate Strategic Planning Process**

Executive Committee (L)  
Executive Team (S)

Begin a strategic planning process that would envision what UJC MetroWest will be in ten years and lay the groundwork for how we get there.

**8. Implement Create a Jewish Legacy (CJL) initiative in MetroWest**

JCF (L,S)

MetroWest has been selected by the Areivim Philanthropic Group to receive a grant of up to \$350,000 – to be matched locally by private donations – that will bring the "Create a Jewish Legacy" initiative to our community. CJL will allow JCF and UJC to provide training for agency and synagogue leadership on the development of legacy gifts for their organizations as well as additional funds for the marketing of deferred giving. MetroWest's goal is to raise matching funds up to \$350,000 and implement the program over a two-year period, potentially with significant input from the Jewish Federation of Central New Jersey.

*Status: JCF MetroWest leadership has approved the initial stages of the program. The grant agreement is in negotiation with Areivim Fund and JCF San Diego and should be approved in September, 2010. Matching donors will be contacted once the grant agreement is finalized. After matching funds have been raised, CJL program will roll out over a two year period.*

**Goal**

**Responsible Leadership (L) and Staff (S)**

**9. Counter growing Boycott Divestment Sanctions** CRC (L, S)

Develop and work with JFNA to develop a continental game plan to counter growing BDS against Israel at college campuses, efforts to boycott investments in Israeli businesses in the U.S. and internationally and by efforts of different faith groups. We must galvanize the community to do our share in confronting the potential of a nuclear-armed Iran.

*Status: UJC will join with JFNA in a national effort to confront growing Boycott Divestment Sanction efforts against Israel by faith groups, Universities and others. Keep Stop Iran Initiative in the forefront by keeping the community informed on the Obama Administration and Congressional actions, putting pressure on NJ businesses and the NJ government to divest and stop their contracts with Iran based businesses working in the oil and energy sector, and through public education programs. The first program tentatively entitled "US Sanctions: A Deterrent or Distraction?" will be held at Kean University in Union this fall (date to be determined). The CRC is continuing its protest against the Honeywell International corporation that is working with Iran and supports United Against Nuclear (UANI) business registry. Established a No Nukes for Iran teen advocacy group that has created, promoted, and sells magnets, posters, and banners. This group is using these materials to raise awareness and as an outreach tool to engage with diverse church and inter-ethnic communities on Iran's threat to the West.*

**10. Increase number of New donors to UJA campaign** M&C (L,S)

Consider feasibility, if funding is made available, of implementing a sustained direct response acquisition program to increase the number of new donors by 15% which would translate into a 5% overall increase of donors for the 2011 campaign year.

**11. Promoting Areyvut (Jewish Mutual Responsibility)** The Partnership (S)  
Leadership Development (S)  
NJ Jewish News (S)  
M&C (S)

"Kol Yisrael Areivim Zeh B'Zeh"—"All Jews are responsible one for the other." As a community, we must review current educational offerings and build upon them to develop a communal educational program that emphasizes Jewish Community and Peoplehood. We will also work to promulgate this concept throughout all the work that UJC MetroWest does in an effort to effect cultural change and inspire action within our community and beyond.

*Status: Survey responded to by 81 rabbis, lay leaders and educators; response rate of over 30%*

*Among findings:*

- *Need to specify goal as Jewish Mutual Responsibility so as not to confuse with other facets of overall "Jewish Peoplehood" concept.*
- *Jewish Mutual Responsibility is on the radar of these opinion leaders, but they seek assistance in strengthening the case and supporting their efforts to advance this behavior in their institutions.*
- *Need to position Jewish Mutual Responsibility as a unique and important value that stands together with, not in place of, Jewish responsibility to global issues.*

*Recommended next steps include:*

- *Develop messaging campaign to promote the value of Jewish Mutual Responsibility throughout MetroWest.*
- *Provide examples/case studies/experiences for members of our community to understand the urgent needs of other Jews.*
- *Develop fact-sheets, op-eds, other tools for rabbis, educators, opinion leaders to promote Jewish Mutual Responsibility.*
- *Utilize material/programs developed nationally or in other communities to the extent possible.*

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**12. Upgrade our Information Technology Capabilities  
To Maximize Financial Resource Development Results**

*IT (S) and Executive (S)*

We have the opportunity to upgrade our technology in the Financial Resource Development (FRD) area. An improved donor information management system for FRD overall is important as is a back-office operations and online fund access systems for Foundation accounts. Upgrades in these areas will allow our FRD departments to operate and collaborate more effectively, helping to develop new resources for the community and positioning UJC and JCF as leaders in the philanthropic marketplace.

*Status: After much effort, UJC National has signed an agreement with Blackbaud to design a new fund raising system that will integrate the annual campaign with the collaborative fund raising model, the web and direct marketing. MetroWest is one of five pilot communities. We are the first community scheduled to go live - with a goal of the end of the next fiscal year.*