

YOUNGSTOWN AREA JEWISH FEDERATION STRATEGIC RENAISSANCE ACTION PLAN

Executive Summary of Task Force Recommendations

To meet the challenges of declining demographics and of shifting needs of the community, the lay leaders and professional staff of the Youngstown Area Jewish Federation began a strategic planning process in February 2016 to better position the Federation to provide leadership and direction for future generations of the regional Jewish community. The first component of the multi-step process resulted in the release in August 2016 of a final draft of a Strategic Action Renaissance Plan (the “Plan”). The Federation Board of Directors is now set to review and approve the Plan, a document that provides an overall framework of recommended actions so that the next phase of the broader strategic planning process can commence.

The Plan sets forth a series of eight values that are fundamental to the work of the Federation, as well as organizational mission and vision statements that are informed by the values. The Plan then discusses in detail three strategies that the community must embrace to carry out the vision and mission statements, and finally recommends specific implementation steps, all with a goal of achieving excellence in all Federation activities, programs, and agencies. The work and conclusions found in the plan unequivocally demonstrate that the Youngstown Area Jewish Federation is still a vital component to Jewish life in the Valley and that with some important strategic adjustments in the way the Federation conducts its day-to-day business, the community has a bright future.

The following is a summary of the key components of the Plan:

Methodology:

In February 2016, the Federation convened a Strategic Planning Task Force (the “Task Force”) to gather and evaluate information to create the Plan. Consisting of Chair Bruce Sherman, Federation and other agency board members, community leaders, and staff, the Task Force worked for six months with a professional consultant to conduct numerous surveys, individual interviews, and focus groups. The Task Force reviewed the information, engaged in visioning exercises, and together with the consultant, finalized the draft of the Plan.

Values:

The Task Force identified a list of eight immutable values to guide all aspects of strategic planning and implementation. They are:

1. Excellence – demonstrate exceptional standards of professionalism and compassion in Federation institutions, connections, outreach, programming and daily life;
2. Welcoming – embrace all community connections, paying particular attention to the diversity of the Jewish community;
3. Israel/World Jewry – building of understanding and connections to the people, history, and future of Israel, and to Jews around the world;
4. Stewardship – making a demonstrable difference in the lives of all community members by engaging in good governance;
5. *Tzedakah* – enhancing the role of philanthropy;
6. Pride – taking pride in all Federation interactions, institutions, and community;
7. Learning and innovation – promotion of an environment that is rich in robust discussion and thought leadership so that new and innovative ideas can inform future actions;
8. Partnership – strengthening connection to the greater Youngstown community by seeking partnerships, collaborations, and cooperative opportunities.

Vision and Mission Statements:

The vision statement articulated in the Plan recognizes and prioritizes the importance of the connections and relationships beyond the Jewish community. The statement reads:

As a leader and convener, the YAJF will engage the broader Jewish community in a vital engaged and nurturing renaissance of Jewish life in the greater Youngstown area

The mission statement expands upon the theme of the vision statement, emphasizing that every Federation project and endeavor must be based on excellence and intentional partnerships, connections, and continued learning. The full mission statement states:

Through a culture of excellence, tzedakah, and tikkun olam, the YAJF brings learning, caring and boundless passion to the communities it serves supporting engagement in Jewish life; fostering meaningful connections with the Jewish community, the broader Youngstown community, and with the community of Israel; and attracting individuals and families to our communities.

Strategies for Implementation:

The core of the Plan consists of three strategies to carry out the vision and mission statements. These strategies address the Federation's role as the primary convener for the regional Jewish community, the imperative for the Federation to engage with the general community locally and in Israel, and for the Federation to establish and maintain excellence in governance and operations.

1. Convener – The primary concerns of virtually all respondents to the Task Force's surveys were the shrinking population, the lack of young people, and the geographic dispersion of the Jewish community. The most noted strengths of Jewish life in Youngstown were the strong sense of Jewish coherence, loyalty, and unity, as well as the strong financial resources of the Federation.

To address these concerns and to build upon the strengths, the Plan states that the Federation must adopt an inclusive, engaging and Jewishly diverse ethos, and must also become the central address of the Jewish community. Although the Federation is functional, the Plan concluded that there are too few human and capital resources in the overall community to support disparate activities of various boards, agencies, and synagogues. And, because individual allegiances to boards and agencies are strong, the plan further concluded that the community is lacking in sufficient resources to work effectively through different agencies. Accordingly, the community must work toward achieving greater unity to move beyond the historical loyalties of each individual entity.

The Task Force determined that there are three specific threads that can best unify the community toward embracing the Federation as a central address and that initial implementation steps of this aspect of the plan should focus on these threads:

- a. Cultural programming/commitment to *tikkun olam*
- b. Jewish educational programming (at all stages of life); and
- c. Health and wellness (programming, initiatives, and agencies)

2. Community Engagement – As with the convener strategy, the Task Force also determined that shrinking demographics was a primary factor in reaching its conclusions about community engagement. To this end, the Plan concluded that strength and continuity come not just from the number of Jews in the community, but also from the quality, accessibility, and diversity of Jewish life that can be enhanced through intentional and strong partnerships to the general community. And, as an ancillary benefit of these intentional partnerships, the Federation can work on initiatives that will hopefully attract more Jews to the region.

3. Excellence in Governance and Operations – The Task Force determined that the Federation will not be well positioned to implement the vision and mission statements without an overhaul of its governance and operating structures. Based on the history of the Federation, the current demographic realities, and the desire to implement the convener and community engagement strategies, the Plan concluded that: a) the community has a shortage of leaders; b) there are too many overlapping boards and committees; and c) that various Federation agency leaders do not always recognize their ties to the central Federation structure.

To meet these governance challenges, the Plan recommends that the Federation specifically convene a Governance Task Force to create a central governing body that will develop more innovative government structures, that all agency boards should be overseen by the Federation, and that all agency activities are informed by the details developed through the previous two strategies.

Implementation of the Plan – Next Steps:

The Task Force recommends that as soon as the Federation approves the strategies outlined in the Plan, that it hire an Implementation Manager/Planner to staff the Federation efforts in moving forward with the next stages of the overall strategic planning initiative. The responsibilities of the Manager – who will be hired as a result of a national search – will be to help create and staff various task forces, each of which will be charged with addressing one of the three strategies. The plan lists a non-exclusive number of ideas and issues that the convener, community engagement, and governance committees should consider and prioritize in moving forward. The lay leaders of these committees, working closely with the Manager, will then bring their findings back to the Task Force and ultimately to the full Federation Board.

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