



JEWISH FEDERATION OF RHODE ISLAND

A PLAN FOR REALIGNMENT

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Table of Contents

	Page
Executive Summary	3
Introduction and Overview	7
The Case for Change.....	10
The Plan for Realignment: Goals, Strategies, Action Steps & Measurements.....	15
Funding Requirement /Sources.....	26
Proposed Staff Organization	29
Footnote Information	38

Executive Summary

Much has changed in the Jewish world in the last seventy years. But relatively little has changed within the Federation system.

The failure to adjust to new realities and prepare for the future has meant:

- Moribund fundraising;
- Skeptical donors;
- A stagnant community;
- The absence of young adults among donors and volunteers;
- Little relationship between funding and priorities;
- Insufficient process to determine community needs, identify gaps in programs and services and evaluate performance;
- Favored outcomes, if achieved, are not communicated to donors.

This reality leads to misgivings within the community about the work of agencies and the usefulness of donations.

“Business as usual” is not acceptable to the Jewish community of Rhode Island or Jewish community leadership.

Our family of agencies is facing many of the same challenges we face. Their budgets have not kept up with demand for services and left them without the capacity to attract, retain and train their employees. The lack of funds has snuffed innovation, deprived our facilities of much needed repair and renovation. Most importantly, we are collectively falling short in our top calling: to serve, educate, engage and inspire our most important constituency, the Jewish people of Rhode Island and southeastern Massachusetts, Israel and around the globe.

We do not propose to dwell on doom and gloom or passively watch the march of time erode our community.

What we do propose is a bold Plan for Realignment. With its implementation we will revitalize our community, reignite the passion of our donors and volunteers and attract young adults. We will also fundamentally change the way we are doing business, especially in the areas of community planning, financial resource development and leadership development and outreach. Our purpose is to reverse the negative community trends (mentioned above) that have been identified in recent years through the spirited implementation of this focused, intentional and thoughtful Plan for Realignment.

The Plan represents a new, comprehensive restructuring of JFRI’s operations and the implementation of promising financial resource development strategies and tactics. It has three key goals:

1. **Raise more money from more donors and achieve high-impact results with the funds.**
 - a. Implement the UJC model emphasizing increased professional involvement in donor-centric and relationship-based fundraising;
 - b. Create a Center for Jewish Philanthropy;
 - c. Enhance community planning, prioritization and evaluation;
 - d. Expand marketing and communications.
2. **Increase the number of involved Jews, especially young adults, and Jewish leaders.**
 - a. Re-launch leadership development;
 - b. Initiate community outreach;
 - c. Implement JFRI governance reforms;
 - d. Increase engagement in community relations and Partnership 2000.
3. **Collaboration, efficiency, quality and accountability.**
 - a. Consolidate administrative functions (financial management) with sister agencies.

We highlight the following as specific and significant anticipated financial achievements of the Plan for Realignment over five years:

- Generate a total of over \$3.35 million in new donations representing more diverse sources of funds;¹
- Increase funds available for allocation to the community by \$900,000;²

This Plan is the culmination of several years of community discussions and planning with regard to building the Jewish community of the future in Rhode Island. During these prior planning processes, the community identified a critical need for the Federation to:

1. Improve fundraising results by diversifying and maximizing revenue sources to be achieved through the implementation of a new collaborative financial resource development model;
2. Align funding to meet community needs and donor interests while using meaningful evaluation and communications tools to convey needs and outcomes to donors;
3. Develop a new pipeline to engage community leaders and implement the Federation's new governance structure;
4. Attract newcomers into the community orbit and reach inward to the under-engaged and disenfranchised to better meet their expectations for engagement;
5. Restore Federation's role as the voice of the Jewish community both inside and outside of our Jewish community;
6. Examine options to restructure the Jewish communal agencies.

Implementation of this plan will require investments in JFRI. The primary investment will be to upgrade the development staff structure, creating a significant marketing capacity, donor relations competency and prioritization and planning expertise. This plan also recommends funding of identified, critical priorities such as community relations, leadership development, outreach and financial management that are currently unfunded or under-funded.

¹ For full explanation of impact on funding for the community, please see chart on Page 29.

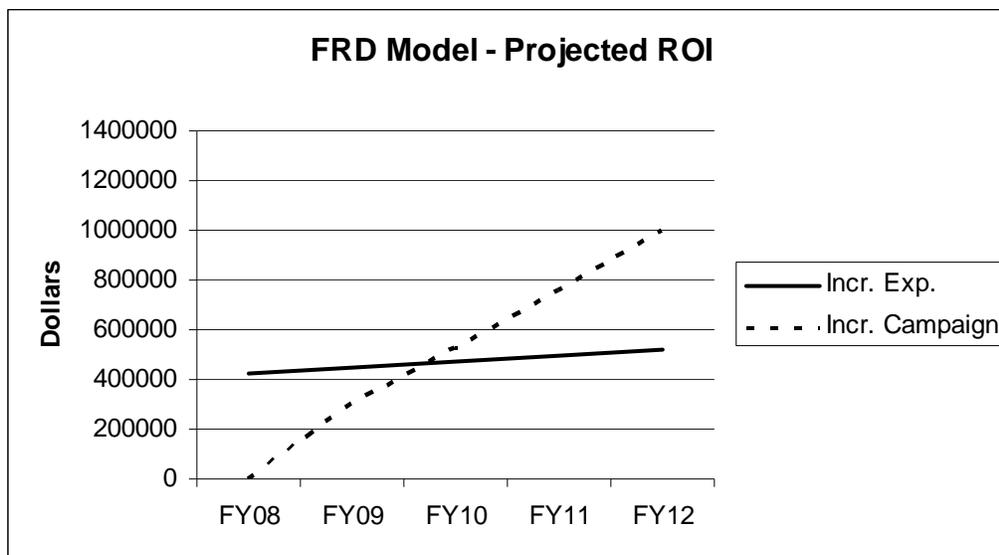
² *ibid*

Upgrading development staff is necessary because professionals will assume a greater role in developing philanthropic initiatives and building relationship with and soliciting donors. According to the 2003 UJC Peer Yardstick, which compared the performance of a cross-section of federations, a key factor in increasing gifts from major donors is the involvement of professionals in the solicitation. When professionals were involved in the solicitation of major donors along with a volunteer, there was a \$3,200 greater increase than solicitations conducted by a volunteer alone. Thus a key to increasing our gifts from major donors is to involve professional staff in the solicitation.

While there are many possible ways to finance the additional spending recommended in the Plan, we contemplate the following sources of funding for the period FY 2008-2012:³

- Allocating to JFRI an average of 23% of the campaign dollars raised;
- Utilizing excess unrestricted endowment investment earning earnings (excess recommended distributable income [rdi]);
- Utilizing in fiscal years 2011 and 2012 money available from JFRI unrestricted income grants, after providing for “normal” (Voice, missions, emergency needs, *B’nai Tzedek*, etc.) grants;
- Utilizing the JFRI Board Designated Pace Fund.

Because FRD is the exclusive fundraising component of the Plan, we focus exclusively on it in calculating and presenting Return on Investment. **In Years 1 and 2 (FY 2008 and 2009), we project a net investment in FRD of \$500,000. We anticipate beginning to recoup the investment in terms of net new dollars available for the community, including JFRI, in FY 2010, 2011 and 2012. By FY 2012 we project a net return exceeding \$800,000, which translates to a net return on investment of 161% of FY 2012 FRD costs and a cumulative five-year return of \$1,000,000 (43% over FRD costs) in additional funds for the community.**⁴



³ See Page 28 for full treatment of sources of funding and page 39 for full explanation of these items.

⁴ See chart on Page 18 for full treatment of FRD return on investment.

We are at a crossroads and a moment of decision. We have a plan before us. It is not a perfect plan. It is not a free plan. It is a plan that will be implemented with excellence and relentless determination. This plan affords to the Federation – and to the Jewish community – the best opportunity in recent years to break the log jam and begin the process of transforming this community and securing our future as a philanthropic Jewish community of service, meaning, relevance, inspiration.

Introduction & Overview

On May 28, 1945, 500 delegates from 51 Jewish organizations met and approved the formation of the General Jewish Committee of Providence as a response to the atrocities inflicted on Jews in Europe during World War II. Six weeks later, on July 11, 1945, the State of Rhode Island and the Providence Plantations recognized and registered the General Jewish Committee of Providence as a corporation.

The 15 incorporators represented a cross section of the Jewish community: among them were Rabbi Morris G. Silk, Dr. Elie Berger, a dentist, Alter Boyman, a merchant, Archibald Silverman, owner of a jewelry factory, Frank Licht, a lawyer, Alvin Sopkin, owner of a clothing factory in Fall River, and Joseph Ress, a lawyer who had moved into the jewelry findings industry.

Within the group were Orthodox, Conservative and Reform Jews, along with secular Jews. Political views were equally diverse. Holding the group together was the shared sense of Jewish community and responsibility to the welfare and safety of Jews everywhere.

In the 50 years that followed World War II, the Rhode Island Jewish community prospered. Through the hard work and dedication – and incredible generosity – of hundreds and thousands of Jews throughout our community, our communal institutions were built and have grown. Most of the agencies we see today saw their rise during these years. These agencies and our family of synagogues have been the backbone of our community support system – educating our families and caring for those in need.

But today's needs have changed and so have our donors' interests. Communal tipping points include:

- A smaller and aging population that has become geographically dispersed;
- Decline in institutional engagement;
- Diminishing fundraising returns in both real dollars and inflation adjusted dollars ;
- Inadequate and failing facilities;
- A serious challenge in retaining/recruiting volunteer and professional leadership;
- Acceptance of Jews outside the Jewish community & attraction of Jews to causes outside the Jewish community;
- Less need to turn to Jewish social services for services as clients;
- Fewer rules or social conventions to bind us together and create expectation of behavior;
- Instinctive/reflexive communal giving/participation giving way to value-driven relationship;
- With challenges of relief, rescue and overt institutional/cultural anti-Semitism behind us, so too are the most compelling reasons to be active in the Jewish communal life created by the structures conceived and built to address these challenges.

Jewish institutional life now competes on the open market, as do Jewish causes. Technology has opened up pocket communities allowing us to affiliate without leaving our home. Simply put, we are all Jews by choice.

Our organized Jewish community – led by the Federation – must be informed by these tipping points, and use them as a guide to reach out with imagination, vigor and vision, offer inspired Jewish experiences and create meaningful Jewish connections.

We are living in a period of historic Jewish cultural, spiritual and political richness and awareness. Today, perhaps our greatest challenge is to define who we are, not in the context of survival but within the framework of what is the meaning and relevance of being Jewish in today's American society.

In recent years, JFRI initiated a process to determine the future of the Jewish community. Dozens of committed people participated in discussions and planning sessions, where they discussed their hopes and dreams. As this effort proceeded, the community recognized the need to innovate, to plan and most importantly to act. During this process, the Federation attempted at least twice to implement a collaborative financial resource development effort similar to that which is recommended in this proposal. Indeed the rationale for change and many if not all of the ideas expressed herein have been discussed and are widely accepted as justified if not critical to reviving our community.

The model that we are recommending is being introduced in Jewish communities across the country. The model itself is not new: Universities and hospitals have employed this collaborative approach with great success for over a decade. Eleven federations have been enlisted by UJC as official “pilot” communities, and another dozen communities are in the “pipeline” to enlist. Yet another 10 communities are deploying all or a significant part of this model (depending on the existing capacity of their federation). These pilot communities are still in the early stages of implementation and there are no tangible results on which to rely. We are working with UJC to learn from other communities’ experiences and apply best practices to our implementation efforts. UJC has formed “team Rhode Island” to work closely with us to implement, execute, evaluate and apply lessons learned.

The core of the overall **Plan for Realignment** – and the funding engine for it – is the **Plan for Collaborative Financial Resource Development (FRD)**, which introduces a model to reposition the Jewish Federation as *the* center for Jewish philanthropy in Rhode Island. Collaborative FRD is not for the benefit and future existence of the Federation itself, but rather is the vehicle to increase support of and perpetuate the programs and activities to meet the current and emerging needs of the entire Jewish community of Rhode Island and Jewish communities across the globe.

The Collaborative FRD plan fundamentally changes how we raise funds by:

- Shifting the focus of fundraising and development to a more donor-centric, cultivation model;
- Identifying and capitalizing on the untapped levels of wealth in the community;

- Expanding the traditional menu to offer donors a diverse menu of annual, supplemental, endowment and capital giving options.

Consistent with these changes, the new model:

1. Redefines the current staff role in fundraising and development;
2. Adjusts and expands the development staff team of the Federation and refocuses the development efforts of the Federation;
3. Creates the capacity to:
 - a. Develop and expand the menu of giving opportunities through an ongoing process of visioning and program design in partnership with the Federation's traditional (JCC, JFS, JCDSRI, BJE, etc.) and non-traditional (synagogues, organizations, etc.) service providers;
 - b. Develop collateral marketing materials to support these programs for deliverables to interested donors;
 - c. Implement a broad-based program and protocol of donor relationship management.

This dramatic and comprehensive realignment plan will require a major restructuring of Federation staffing and strategic investment in new programming and personnel as well as funding long-neglected – and high priority – capacity, such as financial management, community relations and leadership development.

What follows in the Plan for Realignment defines and elaborates on this overview in order to set forth a road map for the future. The successful implementation of this plan will yield results that will ultimately benefit the Jewish communal infrastructure and the Jewish community served by the JFRI.

The Case for Change

Nationwide

The national Jewish Federation system has been the envy of most national public charities. It is annually in “top ten” lists for most funds raised and is currently a three billion dollar philanthropic enterprise. The “system” started with two major national organizations, the United Jewish Appeal and the Council of Jewish Federations, the former assisting in fundraising and advocacy of overseas needs and the latter providing coordination, best practice sharing and leadership to the 189-member Jewish Federations. With the merger of the two entities into United Jewish Communities in 1998, the “system” has, on the one hand, succeeded in meeting numerous, convergent and concurrent national and international challenges (such as two Israel Emergency Campaigns and the Hurricane Katrina Relief Fund) while on the other hand being circumspect about the rapidly changing nature of the Jewish philanthropic enterprise.

United Jewish Communities has recognized that, if the very enterprise that today is producing three billion dollars is to survive and thrive to meet the challenges of the Jewish people, *systemic change will be required.*

The challenges facing the system are significant and numerous:

- An aging donor base
- Concentration of annual gifts from a relatively small number of large donors
- The non-engagement of the “next generation” from traditional venues of Jewish communal life and their disaffection from federated-giving
- An evolving relationship with the State and the people of Israel where “partnership” rather than “charity” is now at the core
- Significant competition from Jewish and non-Jewish charities (where there is total and complete access regardless of ethnicity or faith)
- The plateauing of annual campaigns
- Disappointing market penetration
- The changing role of professionals
- Decreasing budgets and increasing expenses
- Moving from single focus fundraising (the Annual Campaign) to multiple income streams (annual campaign, supplemental giving, capital giving, etc.)

The systemic change contemplated and developed by UJC is the repositioning of the Federation as *the* Center for Jewish Philanthropy. Through the implementation of the Collaborative FRD model, UJC expects to increase all income streams. This model provides a blueprint for communities to expand and maximize giving to all income streams using a donor-centered approach while rebuilding the base.

United Jewish Communities believes that the national enterprise is at the cusp of an enormous opportunity, particularly given both the current wealth of the American Jewish community and the pending transfer of wealth to the next generation of philanthropists. As a result, they have posed the challenge to recreate the Jewish Federation system through an interdisciplinary approach utilizing planning, marketing and development.

History will determine whether this move, in its very early stages, will produce the results required today to meet the Jewish communal challenges of tomorrow. But recent history indicates with painful results that continuing to do what we are doing, the same way we are doing it, is a losing strategy.

Rhode Island

Comparative Data

According to the 2002 demographic study, there is a Jewish population of 18,500 in Rhode Island, and there are 9,550 Jewish households in the state. Rhode Island's Jewish population ranks 38th in the country, and 18th among the 19 Large-Intermediate Federations (this is the city-size group to which JFRI belongs, according to UJC. The group is determined by population and campaign achievement).

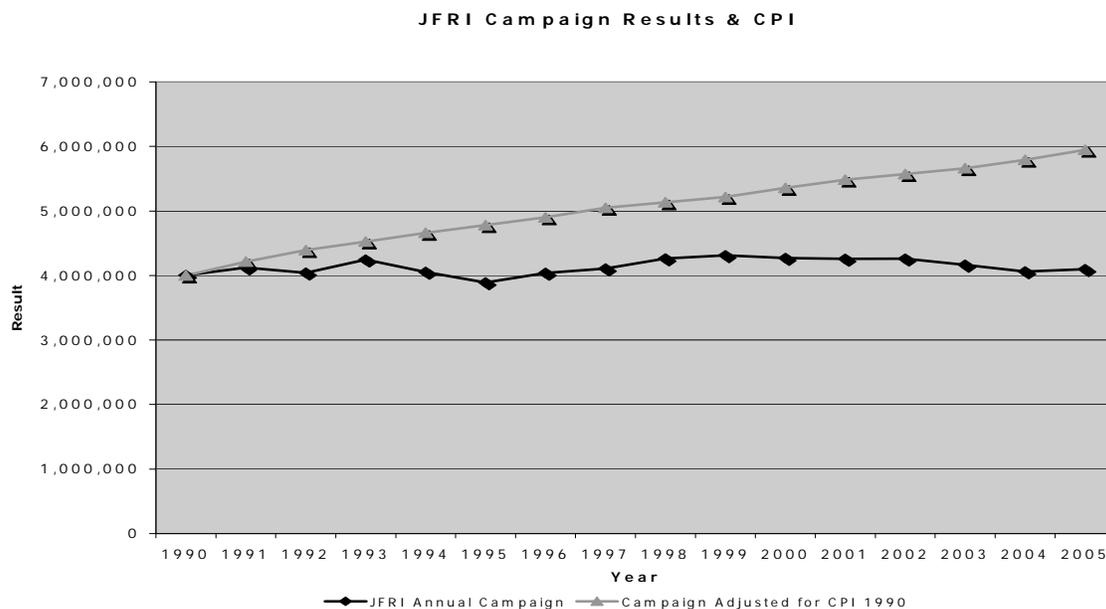
Summary of Large-Intermediate Federations (listed by Jewish population size)

Community	Population	2006 Annual Campaign (millions)	Annual Campaign Rank	Donors	Raw Donor Rank	2005 Endowment Holdings (millions)	Endowment Rank
Broward Co.	213,000	\$5.199	14	5,159	8	\$59.468	7
San Diego	89,000	\$7.351	6	5,889	5	\$216.295	1
Phoenix	82,900	\$5.492	12	6,496	2	N/A	15
Colorado	66,700	\$7.169	7	5,290	6	\$26.059	12
East Bay	60,000	\$3.134	18	3,250	15	\$44.816	10
Dallas	45,000	\$10.114	2	6,466	3	\$103.346	3
Houston	45,000	\$9.256	3	5,252	7	\$52.717	9
Seattle	37,200	\$6.034	11	2,978	16	N/A	15
Hartford	32,200	\$6.646	9	6,605	1	N/A	15

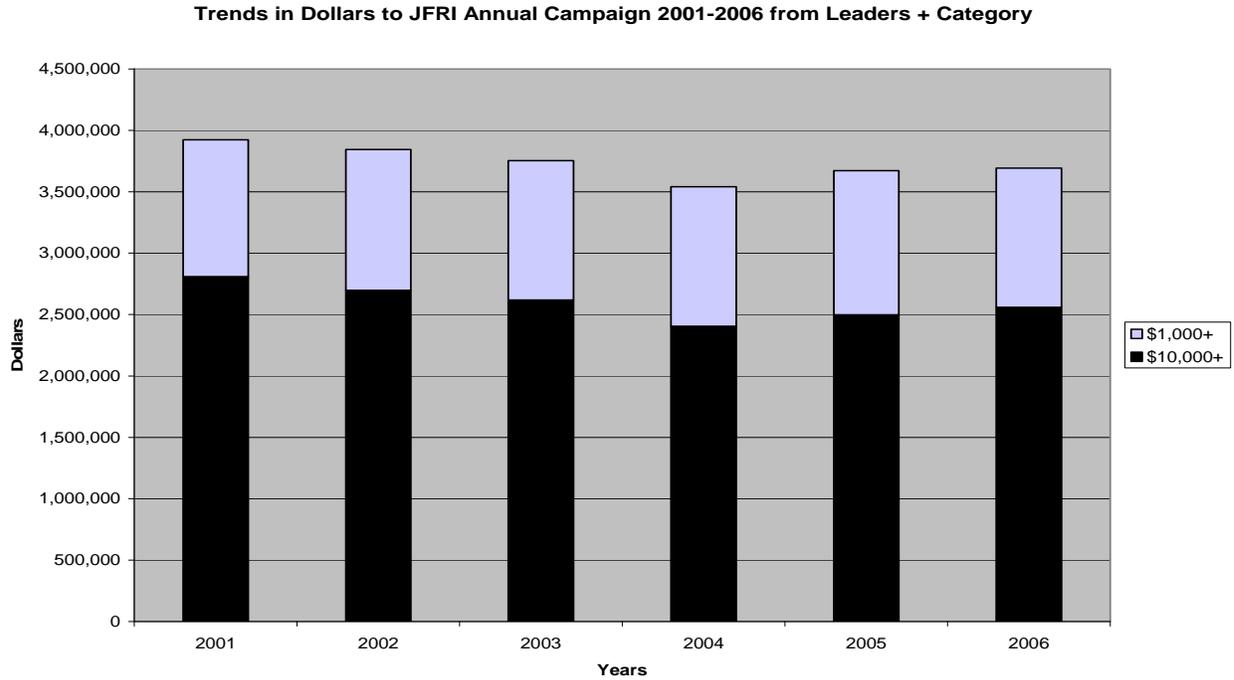
Central NJ	32,000	\$5.445	13	4,149	10	\$10.176	14
Minneapolis	31,500	\$14.594	1	6,241	4	\$75.063	6
Vancouver	22,600	\$6.672	8	3,278	13	\$20.110	13
Cincinnati	22,500	\$6.172	10	3,251	14	\$55.186	8
Rochester	22,500	\$4.714	16	3,488	12	N/A	15
Columbus	22,000	\$8.150	4	2,779	17	\$82.556	5
Milwaukee	20,500	\$7.746	5	4,173	9	\$108.367	2
Kansas City	19,000	\$5.148	15	2,704	18	\$91.372	4
Rhode Island	18,750	\$4.094	17	3,822	11	\$44.238	11
Winnipeg	14,800	N/A	19	N/A	19	N/A	15

Annual Campaign

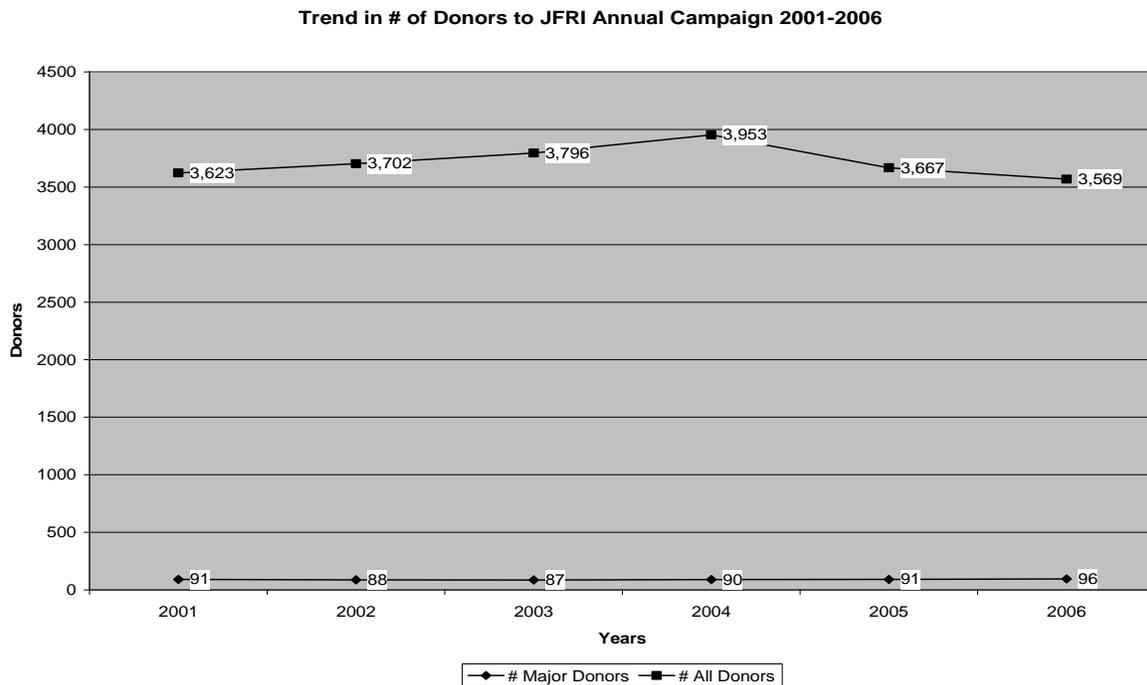
Rhode Island's annual campaign has lost significant ground over the past decade-and-a-half. This following chart demonstrates that if the 1990 Annual Campaign had grown only at the rate of inflation, the JFRI Annual Campaign would exceed \$6 million today.



The trend in dollars from the Leader+ (\$1,000+) category to the annual campaign between 2001 and 2006 is another telling demonstration of a stagnant campaign.



As the chart illustrates, from 2001-2006, dollars raised from \$1,000+ donors has dropped 5.9% (number of donors in this category increased from 537 to 543 or a 1.1% over the same period). In the \$10,000+ category, the decline is even more steep, 8.9% (number of donors in his category increased from 91 to 96 over this period, a 5.5% increase).



Overall, there has been a 1.5% decline in the number of contributors to the campaign since 2001.

The Intersection of Revenue and Expenses

With the campaign failing to increase even at the rate of inflation, the buying power of each dollar raised declines each year, meaning agencies receiving allocations see the value of their allocation shrink year after year. As agency allocations and the JFRI budget remain flat each year, increasing operating costs choke JFRI's budget with each year that passes.

Because of a flat campaign in absolute dollars, the Federation budget has been largely unchanged for several years, and its percentage of the annual campaign has not changed for almost a decade. But the cost of doing business is independent of our ability to gain increases in the campaign. ***As a result, funding for innovative programming and appropriate staffing has been stymied. We have slowly and steadily lost ground and reached a point where Federation is no longer staffed at a level to meet our current goals and high performance expectations.***

What follows are a few examples of deleterious effects caused by under-funding:

- Stagnating campaign;
- Detached and increasingly discouraged donors;
- No outreach to newcomers, affinities, young adults;
- No leadership development;
- Under-performing community relations effort;
- Near total lack of implementation of a communications plan approved by the JFRI Board in 2005;
- Overstretched financial/accounting department chronically behind in completing assignments;
- Virtually no Federation involvement with Partnership 2000;
- Women's Alliance not meeting expectations of its volunteer leadership.

Volunteers continue to serve a major role in the leadership and activities of the Federation. At the same time, the role of the professional has become more significant – and our budget must reflect this new reality.

The Federation budget must be aligned to support our ability to raise much-needed funds to plan, prioritize and evaluate the allocation of community dollars. Our budget must provide the funding to meet the objectives our own planning processes have identified as priorities, including leadership development, young adult engagement and community outreach.

The Plan for Realignment: Goals, Strategies, Action Steps & Measurements

GOALS

The Plan for Realignment includes development and implementation of three key goals:

- 1: Collaborative fundraising
 - A. Collaborative financial resource development (FRD) model (the creation of the Center for Jewish Philanthropy);
 - B. Community planning and evaluation model.
 - C. Marketing and communications

- 2: Community development
 - A. Leadership development
 - B. Community outreach
 - C. Governance implementation
 - D. Community relations (CRC)

- 3: Shared financial services

GOAL 1: COLLABORATIVE FUNDRAISING

Central to our plans is to position the Jewish Federation of Rhode Island as *the* center for Jewish philanthropy in Rhode Island.

The pivotal component is the establishment of a **donor-centered, collaborative fundraising model**, which will grow and maximize giving and increase the flow of funds to *all* income streams. An overview of today's philanthropic landscape and the historical analysis indicates that we should expand and maximize giving to all income streams by implementing a **Donor Management System** and **Relationship-Based Fundraising Model**. The proposed Plan considers important shifting community and national trends as well as a need to realign Federation operations to increase community collaboration, outreach and marketing and integrate planning, financial resource development and human resource development.

The Plan for Collaborative Fundraising recognizes the critical need for an enhanced, interdisciplinary team required to harness the philanthropic capacity of the Rhode Island Jewish community. Moreover, the Plan relies upon the skills and dedication of senior professionals and volunteer leaders to ensure success.

Financial Resource Development (FRD) Strategy

The FRD plan, if it is to be effective, involves a major overhaul of the way we currently do business. We must restructure, re-staff, and retrain. The newly structured, newly staffed and well-trained team will engage in a development process that services the donor base consistent with the following strategies:

- Donor-Centered Development: All fund development efforts are based on a donor-centered, cultivation approach and the menu of giving opportunities is expanded to reflect an updated understanding of community needs and priorities;
- Diversify JFRI giving opportunities - annual, supplemental, endowment and capital giving opportunities;
- Maximize relationships with current and prospective donors based on a shared vision of a vibrant community.

Financial Resource Development (FRD) Action Steps

The Realignment Plan will require a commitment of multiple years in order to see a return on the investment. It calls for senior management professionals to spend significant time interacting with donors, lay leaders and the community (i.e. reduced time in operations yields more time to spend on meetings with top donors resulting in top donor increases). A four-tiered action plan will ensure effective utilization of human resources and optimize fundraising. Action steps will include:

- Implement a donor relationship program focused on top donors and their families to help them accomplish their philanthropic goals and secure current giving in perpetuity while simultaneously meeting current community needs. This step will focus on annual giving as well as planned giving and endowments. This will require allocation of more professional resources to top donors;
- Implement a plan that builds targeted engagement and affinity programming in order to strengthen community building and increase fundraising results;
- Optimize involvement and support for the community campaign through collaborative ventures, which result in a unified community committed to growth in fundraising and participation in the community campaign.
- Provide donors with a menu of community-vetted supplemental opportunities, which include a variety of FRD vehicles designed to build community campaign while also moving community campaign donors to top donor and affinity group status.

Financial Resource Development (FRD) Measurements: As a result of full implementation of our FRD plan, restructured/new staff and the appropriate increase in resources we anticipate the following outcomes:

- A. Increase total gifts and (number of) donors:
 - Existing donors
 - New donors
 - By donor segment
 - By age
 - By gender

- By geography
 - Jewish agencies
 - Federation leadership
 - Former Federation leaders
- B. Increase frequency of donor contacts to:
- New donors
 - By donor category (giving level/capacity, affinity, other factors)
 - Families
 - Affinity groups
- C. Increase proposals presented to and accepted by donors
- D. Improve timeliness and accuracy of contact reports;
- E. Identify and increase number of participants from young adult donor category, especially major donor or potential for major gifts;
- F. Significantly increase endowment funds, additional giving to existing endowment funds and planned gifts.

FRD – Projected Financial Return on Investment in FRD

	FY2008	FY2009	FY2010	FY2011	FY2012	Total
Annual	4,100,000	4,407,500	4,627,875	4,859,269	5,102,232	23,096,876
Increase over flat (2007) campaign	0	307,500	527,875	759,269	1,002,232	2,596,876
Other Giving⁵	0	70,000	125,600	217,624	347,255	760,479
FRD Implementation Expenses	421,614	448,282	473,250	494,588	517,018	2,354,752
Net ROI	-421,614	-70,782	180,225	482,305	832,469	1,002,603
ROI %	-100%	-16%	38%	98%	161%	43%

Community Planning Strategy:

Meaningful and focused community planning includes prioritization, outcome-based allocations and ongoing evaluations that determine impact; well designed communal and individual strategies and support for projects and programs that fill unmet needs and gaps in service while creating new ideas.

This process responds directly to local and oversees needs and then identifies programs and strategies that meet those needs. JFRI needs a planning process that will reach beyond our traditional planning and allocations distribution system and employ the following strategies:

- Identify needs and revenue sources;
- Develop strategies;
- Engage the community;
- Evaluate and report on impacts.

⁵ Other giving reflects a combination of supplemental gifts (in addition to annual campaign gift), endowments and planned gifts.

Community Planning Action Steps:

A strengthened community planning model, including prioritization, allocation, distribution and evaluation, will help ensure we meet local priorities and worldwide Jewish needs. Actions steps will include:

- Engage the Community Leadership Council as a forum to identify and discuss community priorities and unmet needs;
- Establish planning commissions to engage in ongoing prioritization planning;
- Develop goals and strategies to address communally vetted needs;
- Monitor, evaluate and report on outcomes of allocations with an eye towards increased fundraising based on programs related to specific donor interests;
- Identify and prioritize needs and gaps in service based on Federation’s vision, agency input and desired outcomes;
- Work collaboratively and strategically with FRD and marketing to develop products and programs, which provide data for case for giving for each product;
- Create templates for synagogue and agency proposals.

Community Planning Measurements: We expect our plan to produce increased (community) engagement; a formal planning/vetting process and a greater ability to identify and prioritize gaps in service resulting in a well thought out menu of giving opportunities. With the appropriate staff and volunteers, we anticipate the following specific outcomes:

- Implementation of new planning and allocation process within one year
- Completion/distribution of evaluation guidelines for funding recipients, which show specific metrics and measurements;
- Create solid plan for recruitment/retention of engaged volunteers (reflecting diversity of age, affiliation, geography and gender) for planning commissions;
- Create uniform evaluation mechanisms;
- Create and distribute a menu of giving opportunities resulting in increased donors and greater community awareness.

Marketing Strategy:

Successful realignment depends heavily on the implementation of a marketing strategy that will position JFRI as *the* Center for Jewish Philanthropy. The marketing strategy must be meaningful, create a profile, and attract new attention and engagement while inspiring the community to invest in clearly articulated needs. Marketing will need to focus on packaging various programs and projects in order to create a compelling “product line” to be used by development professionals as needed. Additionally, a multi-faceted approach to marketing the community campaign will be crucial. It will include direct mail, telemarketing, e-philanthropy, event

planning and other techniques. Ultimately, our marketing efforts will involve these detailed strategies:

- Creating and implementing a vibrant, recognizable **brand** that inspires connection and reflects the newly positioned organization;
- Developing a comprehensive marketing campaign that educates our community, elevates our positive visibility and grows our credibility;
- Working closely with FRD and Community Development to custom design marketing efforts for each segment of our donor base and partnering with both teams in every aspect of their work;
- Creating an e-marketing plan designed to reach the next generation of donors;
- Building a broad based direct mail appeal that is followed up by telemarketing;
- Creating useful and powerful marketing tools for use by professionals and lay leaders;
- Promoting the totality of the philanthropic giving opportunities including all income streams and providing donor recognition and acknowledgement.

Marketing Action Steps:

- Work collaboratively with FRD, Community Development and Community Outreach/Leadership Development teams to develop targeted marketing strategies, which educate donors and increase the visibility and relevance of the Federation;
- Determine market segments and create segment-specific collateral for use in fundraising;
- Implement inter-agency planning to leverage resources, eliminate redundancy, integrate shared services, share database and maximize cross-marketing potential;
- Work with FRD to create and implement cost-efficient and effective e-philanthropy, direct mail and networking of major events;
- Market the impact of programs and services and attribute Federation support.

Marketing Measurements: We anticipate that a streamlined marketing approach, led by a dedicated Marketing Director in collaboration with restructured FRD and Community Development teams, will result in more effective marketing approaches and improved outcomes. With increased staff and resources we expect the following outcomes:

- Brand the Center for Philanthropy and successfully make case for change;
- Create e-philanthropy and community campaign tools resulting in increase of new donors, retention of existing donors and increase in dollars donated;
- Create E-marketing campaign resulting in greater awareness of Federation programs and giving opportunities
- Expanding database of names resulting in new direct mail opportunities and increased donor involvement;

- Upgrade website to meet communications and FRD needs resulting in increased “hits” and utilization of Internet tools for donations. (Website development requires a whole set of unique goals and objectives specific to the media and target audience.)

<p>GOAL: COMMUNITY DEVELOPMENT</p>

The second goal of realignment is **Community Development**. This means a purposeful, long-term investment in community leadership development, Federation governance development (developing our Board, which requires intentionality and staffing) and community outreach.

We must focus on our current lay leaders by giving them all of the tools and support they need to act as representatives of JFRI. We must attract new constituents through targeted engagement, outreach and investment in leadership development. Volunteer leaders have great potential to play vital roles in our community, and they provide critical input on program development, community needs and interests. Engaged leaders serve as community role models to encourage and motivate others, and they can be powerful and persuasive door-openers to new constituents.

Leadership Development Strategy:

We will institute a model for leadership development that is focused on increasing new leadership while strengthening and renewing connections and interest of seasoned leadership. Strategies will include:

- Create/implement a plan for development of next generation of agency and community volunteers leaders
- Expand the expertise of community and agency leadership through leadership institute and leadership programming;
- Generate innovative, big ideas for community discussion and engagement via the Community Leadership Council (CLC);
- Create innovative new leadership development programming and opportunities;
- Elevate prestige of volunteerism.

Leadership Development Action Steps:

- Create volunteer committee to develop specific programmatic plans for engaging leaders/volunteers across age segments (teens, young adults, singles, etc.) and affinities (medical, legal, business, etc.);
- Develop “each one teach one” model where seasoned lay leaders mentor emerging leaders by engaging them in Federation events and activities and the development of new programs;
- Create and implement a curriculum and programming for a Leadership Institute with several levels of engagement;

- Generate specific ideas and implementation plans for social action/community service that resonate with both emerging leaders/next generation of leaders and can be used as a template for annual programs;
- Tap into existing agency and/or synagogue leadership development/social action programs lending support and voice while acting as a clearinghouse for the exchange of ideas and coordination of efforts

Leadership Development Measurements: We anticipate our restructured plan will lead to increased staff and layleader time designated to creating and implementing specific leadership curriculum, programs and engagement opportunities, resulting in the following outcomes:

- Successful recruitment of candidates for leadership development programs and JFRI board and committees;
- Successful engagement of Young Adults for targeted leadership development and engagement opportunities;
- Establishing mentoring program pairing seasoned leaders with emerging leaders.

Community Outreach Strategy:

We will institute a model for community outreach that positions JFRI as a central starting point for engagement and participation in our community. Our model will focus on increasing the participation of those currently involved and engaging new participants in the Federation through unique outreach vehicles specifically designed for various target audiences. Strategies will include:

- Identify, reach out to and engage unaffiliated individuals/families, young adults (25-45), newcomers to RI and interfaith families;
- Coordinate and direct Federation's regional outreach and engagement efforts;
- Collaborate with agencies and synagogues to develop entry points, means of identifying newcomers, and appropriate follow-up protocol e.g. JCC pre-school, BJE tutoring, etc.);
- Strengthen (outreach) marketing efforts and update/expand upon existing materials.

Community Outreach Action Steps:

- Work with Marketing and FRD staff to create outreach strategies such as direct mail pieces, programming opportunities, etc.;
- Work with programming staff to create programs specifically tailored to interfaith families; identify and form representative committee;
- Create/update newcomers, young adult, interfaith packets of information, directory and community overview; create lay leader committee consisting of both new and long time residents;

- Create community service projects specifically geared toward young adults, which encourage socializing and fun with a community service component; develop a plan for regular events;
- Evaluate and update Voice and Herald graphics and content to appeal to younger readership;
- Collaborate with agencies to create progressive “get to know us” events highlighting the work of Federation in the community.

Community Outreach Measurements: Our community outreach team will work cooperatively with Marketing and FRD to create increased interest and opportunities for engagement in innovative programs. We anticipate that a well focused approach coupled with necessary resources will result in the following outcomes:

- Develop and implement outreach plan generating new contacts in Jewish community;
- Coordinate and collaborate to increase hosted interfaith events and programs;
- Develop new Federation volunteers through new interest areas;
- Identify 25 young adults and create and implement engagement plan for them;
- Develop program for young adults with participation (planning) from young adults;
- Identify 25 young families for development and engagement.

Governance Implementation Strategy:

Create and implement a new governance structure that fits within the Federation realignment goals; including plans for formal board training, creation of agreed upon goals that fit within strategies and action steps; responsibility for leading (with assigned staff) implementation of specific strategies and action steps. Strategies include:

- Implement plan connecting realignment to new governance policies and plans;
- Restructure committees to meet new governance and realignment needs and use committee participation as engagement tool;
- Identify new future board members based on new JFRI model;
- Provide high-level opportunities and content for board leadership development aimed at Federation and agency board members.

Governance Implementation Action Steps:

- Create/update governance committee guidelines, strategies;
- Create/update governance committee members, add new members; representative of specific segments of community (i.e. major donors, emerging leaders, Israel activists, etc.) and diversity (i.e. gender, geography, affiliation);
- Identify ideal qualities for board leadership;
- Update/add committees to board as appropriate with realignment goals;
- Create new board training format to reflect realignment goals and to offer professional development opportunities;
- Identify leadership for committee chair roles;

- Update board responsibilities and by-laws as necessary in connection with realignment goals.

Governance Implementation Measurements: A governance restructuring plan will reflect a thoughtful process for identifying and selecting a diverse board of directors resulting in increased expertise and participation in Federation activities. We anticipate the following outcomes:

- Successful creation of new guidelines passed and approved by existing board;
- Successful outreach and addition of new board members reflective of diverse cross section of major donors, next generation, etc.;
- Board approval/implementation of new committee structure;
- Create/implement new board training events and/or “professional” development opportunities for board members;
- Successful approval of by-law changes relative to realignment goals;
- Placement of JFRI leaders within UJC or other national structures.

Community Relations (CRC) Strategy:

Reposition and strengthen our Community Relations Council (CRC) as the center for effective liaisons with groups, individuals and institutions in the general community. Foster inter-group, inter-faith understanding and cooperation and engage the Jewish community, both institutionally and individually. In addition, we will seek to strengthen pro-Israel advocacy and help build communal and individual relationships with Israel and its people. We will also advance the Federation’s public policy agenda. Strategies include:

- Implement plans for Federation’s federal, state and local legislative agenda;
- Ensure development of high-level leadership among the lay community for CRC involvement;
- Ensure strong media relations;
- Position CRC as central security coordinator;
- Create social action criteria;
- Develop JCRC mission trips;
- Direct community participation in national CRC efforts.

Community Relations (CRC) Action Steps:

- Create and implement participation in public policy advocacy efforts;
- Implement formal media monitoring consistent with appropriate coverage of the Jewish community and Israel;
- Implement formal Israel advocacy training;
- Coordinate Jewish community security and liaise with appropriate law enforcement agencies and personnel;

- Liaise with the Marketing and communicate with the media on those issues relevant to the Federation, JCRC and its agenda;
- Create and implement plan for formal social action and social justice programming and identify and appoint community leaders to chair;
- Work with Leadership Development team to identify CRC leadership candidates;
- Coordinate local CRC efforts with national and local Jewish groups on JCRC issues;
- Coordinate and collaborate with existing social action networks throughout the Jewish community;
- Plan/implement JCRC missions;
- Coordinate community's participation in Partnership 2000.

Community Relations (CRC) Measurements: The securing of a new CRC Director coupled with engaged layleaders, a process to increase advocacy work, attention to media tracking and professional and layleader involvement in national and international issues means we will anticipate the following outcomes:

- Successfully create appropriate Federation legislative agenda and train volunteers to engage in its advocacy;
- Track all media relating to JFRI agenda;
- Publish six commentaries and 10 letters to the editor in support of JFRI's policy agenda;
- Send six advocacy letters to appropriate elected officials;
- Offer to create, train and implement formal security measures in synagogues and agencies;
- Create and implement three new social action programs;
- Plan/implement CRC mission trips (national/international);
- Recruit Partnership 2000 Committee, and review and revise programs, activities and community goals;
- Meet and engage relevant leaders and activists.

GOAL: SHARED FINANCIAL SERVICES INFRASTRUCTURE

Shared Financial Services means the collapsing of "backroom" financial/accounting staff from across several agencies into one office at the Federation. This process has already been initiated with the JCCRI and we are expecting in the fall of 2007 to see completion of this initial integration model.

The goal of this effort is to meet financial/accounting needs with higher quality and consistent products and services at a lower overall cost.

Shared Financial Services Infrastructure Strategy:

- Offer JFRI expertise to provide financial/accounting services to agencies.

Shared Financial Services Infrastructure Action Steps:

- Examine the financial infrastructure and reporting/tracking needs of agencies;
- Determine the software, hardware, personnel and overall cost structure to integrate individual agencies' financial/accounting structures;
- Develop plans for integration of personnel, equipment and systems;
- Determine agency financial/accounting needs and plan to meet them.

Shared Financial Services Infrastructure Measurements: The success of this plan means a more centralized and streamlined approach to our community accounting needs, which will result in better tracking of all costs. We anticipate the following specific outcomes:

- Create timeline for implementation;
- Create content and timeline for recruitment meetings and identify chair/committee and
- Successfully meet individual agency financial/accounting needs.

Funding Requirements/Sources

Additional Budget Requirements FY 2008-2012

	A	B	C	D	E	F
1	Financial Resource Development -- 3 FTEs					
2		<u>FY2008</u>	<u>FY2009</u>	<u>FY2010</u>	<u>FY2011</u>	<u>FY2012</u>
3	Development -- 1.5 FTEs					
4	Compensation (Chief Philanthropy Officer 1 FTE;					
5	Dir. Women's Alliance, Young Adults & Affinities					
6	.5 FTE; Upgrade CFO and Admin. Positions)	196,030	220,011	231,845	241,145	251,059
7	Operations	12,229	7,118	7,928	8,762	9,621
8	Program	11,000	12,974	15,007	17,100	19,257
9						
10	Marketing -- 1 FTE					
11	Compensation (Dir. Marketing & Communications 1 FTE)	88,484	93,267	98,365	102,127	106,119
12	Operations	3,616	1,814	2,018	2,228	2,445
13	Program	45,000	46,350	47,741	49,173	50,648
14						
15	Planning -- .5 FTE					
16	Compensation (Dir. Community Planning & Philanthropic Initiatives .5 FT)	50,938	53,483	56,105	58,805	61,586
17	Operations	3,616	1,814	2,018	2,228	2,445
18	Program	10,700	11,450	12,223	13,019	13,839
19	Total	421,614	448,282	473,250	494,588	517,018
20						
21						
22		<u>FY2008</u>	<u>FY2009</u>	<u>FY2010</u>	<u>FY2011</u>	<u>FY2012</u>
23	REBUILD JFRI CAPACITY -- 2.5 FTEs					
24	Compensation (Leadership Development Director and Community Outreach 1FTE, CRC Director .5 FTE, Accountant 1 FTE, Admin Position Upgrade)	154,194	161,893	170,257	177,670	185,635
25	Operations	2,616	676	738	801	867
26	Program	10,000	10,498	11,011	11,539	12,083
27	Total	166,810	173,067	182,006	190,011	198,585

Shared Financial Services

Shared Financial Services are anticipated to be budget neutral.

Recommended Funding Sources

The following chart contains our recommendation regarding funding sources to implement the Plan for Realignment:

	A	B	C	D	E	F	G	H
1	JEWISH FEDERATION OF RHODE ISLAND							
2	BUDGET RECAPS							
3			NEW	NEW	NEW	NEW	NEW	
4		APPROVED	STRUCTURE	STRUCTURE	STRUCTURE	STRUCTURE	STRUCTURE	
5		BUDGET	BUDGET	BUDGET	BUDGET	BUDGET	BUDGET	
6		FYE 08	FYE 08	FYE 09	FYE 10	FYE 11	FYE 12	TOTAL
7	NET EXPENSES:							
8	Operations and Endowment	1,202,531	1,624,145	1,808,599	1,897,740	1,971,679	2,050,177	
9	Rebuild JFRI Capacity	-	166,810	173,067	182,006	190,011	198,585	
10	Sub-total	1,202,531	1,790,955	1,981,666	2,079,746	2,161,690	2,248,762	
11	Community Event	50,000	50,000	51,500	53,045	54,636	56,275	
12	TOTAL NET EXPENSES	1,252,531	1,840,955	2,033,166	2,132,791	2,216,326	2,305,037	
13								
14	SURE REVENUE SOURCES:							
15	JFRI Allocation from Campaign	756,620	756,620	928,860	1,039,048	1,154,745	1,276,226	
16	1% Endowment Admin Fee	445,911	445,911	472,100	498,171	520,719	539,554	
17	Community Event Grant	50,000	50,000	51,500	53,045	54,636	56,275	
18	Overseas assistance with CRC	12,500	12,500					
19		1,265,031	1,265,031	1,452,460	1,590,264	1,730,100	1,872,055	
20								
21	PRELIMINARY SURPLUS (SHORTFALL)	12,500	(575,924)	(580,706)	(542,527)	(486,226)	(432,982)	
22								
23	Other Potential Revenue Sources:							
24	Excess rdi		0.0300	0.0225	0.0150	0.0075	0.0000	
25	Excess (over 6%) investment earnings on unrestricted funds		563,424	447,620	292,229	148,719	-	1,451,992
26	Available from buckets (assuming "normal" grants)		-	-	-	156,532	145,341	301,873
27	JFRI Pace Fund		-	1,086	210,298	140,975	247,641	600,000
28	Interest on operating cash		-	80,000	40,000	40,000	40,000	200,000
29	Unused shrinkage (rough estimate)		-	52,000				52,000
30	Capital Campaign							
31		-	563,424	580,706	542,527	486,226	432,982	
32	Difference	12,500	(12,500)	0	0	(0)	(0)	

Note: The average federation percentage allocation is 23%. JFRI currently receives an 18.49%. The chart above reflects an average JFRI allocation percentage of 23%. This figure would be reviewed during the five-year period reflected in the charge.

	A	B	C	D	E	F	G
1	Community Impact						
2		NEW	NEW	NEW	NEW	NEW	
3		STRUCTURE	STRUCTURE	STRUCTURE	STRUCTURE	STRUCTURE	
4		BUDGET	BUDGET	BUDGET	BUDGET	BUDGET	
5		FYE 08	FYE 09	FYE 10	FYE 11	FYE 12	TOTAL
6							
7	FRD Implementation Costs	421,614	448,282	473,250	494,588	517,018	2,354,752
8							
9	<u>Increase in Donations:</u>						
10	Campaign		307,500	527,875	759,269	1,002,232	2,596,876
11	Supplemental		70,000	125,600	217,624	347,255	760,479
12			377,500	653,475	976,893	1,349,487	3,357,355
13							
14	Excess of Increased Donations over FRD Costs	(421,614)	(70,782)	180,225	482,305	832,469	1,002,603
15							
16	<u>Impact on Agencies:</u>						
17	Additional donations		377,500	653,475	976,893	1,349,487	3,357,355
18	Reduction of endowment money available for other community needs (see below)	(28,796)	(57,832)	(84,958)	(257,975)	(261,166)	(690,726)
19	Sub-total	(28,796)	319,669	568,517	718,918	1,088,321	2,666,629
20	Less endowment gifts		(20,000)	(50,600)	(92,624)	(147,255)	(310,479)
21	Available for community	(28,796)	299,669	517,917	626,294	941,066	2,356,150
22							
23	Available to meet Plan implementation costs		172,240	282,428	398,125	519,606	1,372,399
24	Additional available for allocation to other agencies	(28,796)	127,429	235,489	228,169	421,460	983,751
25	Total	(28,796)	299,669	517,917	626,294	941,066	2,356,150
26							
27	<u>Reduction of endowment money available for other community needs:</u>						
28	5% of excess rdi	28,796	50,552	65,164	72,600	72,600	289,711
29	Unrestricted grants				156,532	145,341	301,873
30	5% of JFRI Pace Fund & related items		7,279	19,794	28,843	43,225	99,141
31		28,796	57,832	84,958	257,975	261,166	690,726

Proposed Staff Organization

The staff of the Jewish Federation of Rhode Island needs to be well-positioned to launch this Plan for Realignment with a special emphasis on implementing the Collaborative FRD model. The Plan will require team restructuring so that we can start to re-inspire community trust and execute the Plan successfully.

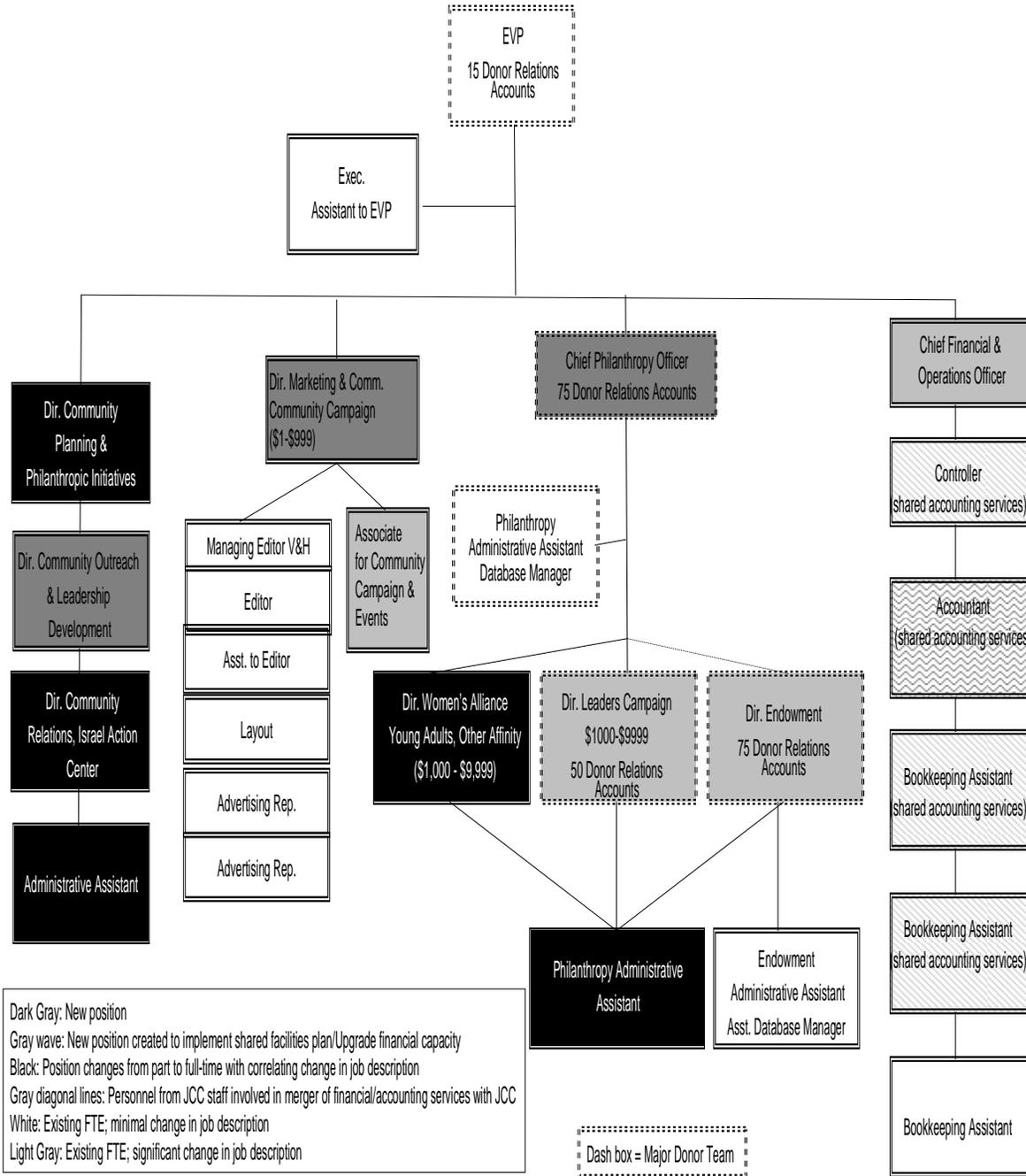
The Plan requires a new professional table of organization to complement the new structure. The changes in the current structure are reflected on the chart on a page that follows. Two assumptions driving this change include:

1. Major gifts donor management and relationship-based fundraising is a time intensive process involving a dedicated Development Team of senior professionals and key lay leaders.
2. The capacity of the Federation EVP/CEO to cultivate donors is central to the Plan's success. A minimum of 60% of his time must be dedicated to donor development.
 - a. The CFO position is expanded to Chief Financial and Operations Officer, to include overall office and operations management.

The organizational chart on the following page reflects the new structure to accomplish the goals set forth in this plan:

JFRI Plan for Realignment Full Office

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The following abbreviated job descriptions reflect the new/upgraded positions or updated job responsibilities for existing positions (as designated below):

Abbreviated Job Descriptions

Chief Philanthropy Officer – NEW POSITION

Reports to: EVP

Direct reports: Director Endowment, Director Leaders, Director Women’s Alliance, Senior Philanthropy Assistant, Philanthropy Assistant.

Committee duties: Financial Resource Development Committee

Responsibilities:

- Serve as account manager for approximately 75 major donor accounts.
- Direct and manage the Philanthropy team, including all aspects of financial resource development.
- Staff major federation solicitors.
- Provide leadership, direction and mentorship to staff colleagues.
- Create and solidify an innovative and coordinated development infrastructure to support maximum short-and long-term fundraising goals.
- Develop and implement an overall strategic plan for an integrated FRD model.
- Lead and participate in the cultivation and solicitation of major contributors and campaign leadership and provide stewardship to the donor cultivation process.
- Recruit and develop volunteers to ensure a pipeline of active leadership for the future.
- Oversee the recruitment process to hire, train and supervise development professionals.
- Manage the overall relationship with relevant Boards and Committees, involving staff and lay leaders as appropriate.
- Lead the Philanthropy Team to facilitate the development and implementation of an integrated resource development model.
- Participate as a member of the senior management team and provide consultation to the President and CEO on all philanthropy related issues.
- Ensure that donor information is effectively and efficiently maintained and prospect cultivation activity is appropriately tracked.
- Ensure reporting systems are complete, efficient, accurate and monitored for quality control.
- Ensure that appropriate systems are in place to provide appropriate donor recognition and exceptional customer service to all donors and prospects.

Director, Endowment – EXISTING POSITION, REDEFINED RESPONSIBILITIES TO INCLUDE DIRECT DONOR MANAGEMENT & CONTACT

Reports to: Chief Philanthropy Officer (CPO)

Direct reports: Endowment Administrator

Committee duties: Endowment Committee

Responsibilities:

- Provide expertise on planned giving for Federation solicitors and donors as well as agencies and synagogues.
- Works with current and prospective donors to build resources in the Fund, develops creative proposals, and promotes the Endowment Fund throughout the community.
- Lead and participate in the cultivation and solicitation of major contributors and campaign leadership and provide stewardship to the donor cultivation process.
- Direct and conduct development, solicitation and marketing to create new endowment funds.
- Increase gifts from current donors and obtain gifts such as bequests, gifts of retirement plans and split interest trusts and other entities that will substantially contribute to Federation's future endowment.
- Enhance communication, offer educational opportunities and maintain positive relationships with annual campaign donors and current fund holders so they continue to be a key source of additional endowments.
- Maintain and enhance relations with area professional estate planning community and cultivate these sources of business referrals.
- Maintain and enhance relations with local and national foundations and seek to identify strategic collaborations.
- Advise and assist prospective donors and their professional advisors in their charitable and estate planning efforts.
- Direct strategic planning for endowment department to create the maximum financial resources with controlled expenditures.
- Staff endowment committees.
- Demonstrate leadership, communication, mentoring, empowerment and resource management within Federation and the endowment department.
- Ensure operations of foundation endeavors are conducted within stringent requirements of law and fiduciary duty.
- Maintain relationships with, and the records of, affiliated supporting foundations.
- Provide effective liaison with other departments to promote integration of donor development, marketing, information technology and fund distribution into successful Federation operations.
- Direct the operations of the endowment department to include record retention, fund distributions, events and mailings.

Director, Leaders Division and Institutional Advancement – NEW POSITION

Reports to: CPO

Responsibilities:

- Assignment and rating of pledge cards within division.
- Effective communication with and development, management and recognition of solicitors within division.
- Cultivation and personal solicitation of approximately 50 individuals in the Major Donor and/or Leaders category per year.
- Creating and implementing strategy to identify, cultivate and successfully solicit corporations.
- Grant-writing.

Director, Women’s Alliance, Young Adults and Affinity Groups – UPGRADED FROM PART-TIME TO FULL-TIME WITH ASSOCIATED EXPANDED RESPONSIBILITIES

Reports to: CPO

Direct reports:

Responsibilities:

- Plans, creates, organizes and staffs programs and activities to achieve the fundraising and other objectives established for the Women’s Alliance, Young Adults and other affinity groups.
- Directs and implements activities to motivate women, young adults and others within identified affinity group in the Jewish community to assume responsibility for significant roles and participation in the work of the Federation, aid in their leadership development and participation in Federation’s philanthropic efforts.
- Responsible for implementing programs and activities and oversee other campaign projects as assigned by the CPO.
- Assignment and rating of pledge cards within division.
- Effective communication with and development, management and recognition of solicitors within division.
- Recruits, trains and motivates, engages and communicates with relevant volunteers.
- Recruits, trains and helps assign volunteer workers to implement both Board and Division activities and programs, and provides guidance and leadership in their conduct of an annual fundraising campaign.

Senior Philanthropy Assistant, Database Manager – EXISTING POSITION

Reports to: CPO

Direct reports:

Responsibilities:

- Database management
- FRD administrative support

Philanthropy Administrative Assistant – EXISTING POSITION

Reports to: Director Endowment

Direct reports:

Responsibilities:

- Backup database assistant
- FRD administrative support

Director Community Planning & Philanthropic Initiatives – UPGRADE FROM PART-TIME TO FULL-TIME

Reports to: Executive Vice President/Chief Executive Officer (EVP)

Direct reports: Director of Community Outreach and Leadership Development, Director of Community Relations and Israel Action Center, Administrative Assistant.

Committee duties: Planning Commissions, Community Leadership Council, Community Development Committee (Planning & Allocations), Emergency Committee

Responsibilities:

- Staff community development process through which priorities are determined and approved, funds (from any source under federation control) allocated consistent with priorities, metrics established and evaluation conducted.
- Work with Director of Marketing and Communications to prepare evaluation outcomes for appropriate publication and communication to community and donors.
- Conduct regular oversight of allocated funds, including review and analysis of operating budgets and financial reporting of partner agencies.
- Responsible for community and agency strategic planning and implementation.
- In coordination with relevant donor relations staff and Director of Marketing and Communications, manage the development of solicitation proposals and the preparation of cultivation materials.
- Build and sustain relationships with community organizations in order to develop proposals that meet community needs and donors interests.
- Participate as a member of the senior management team and provide consultation to the President.

Director Community Outreach & Leadership Development – NEW POSITION

Reports to: Director Community Planning & Philanthropic Initiatives

Committee duties: Governance Committee, Leadership Development Committee.

Direct reports: None

Responsibilities:

- Identify, reach out to and develop current and next generation of agency and community volunteers.
- Identify, reach out to and engage unaffiliated individuals/families, young adults (25-49), newcomers to RI and interfaith families. Coordinate community's efforts.
- Coordinate and direct Federation's regional outreach and engagement efforts.
- Expand the expertise of community and agency leadership.
- Direct leadership institute and other leadership programming.
- Staff and coordinate Community Leadership Council process and meetings.
- Staff and coordinate Federation awards processes.

Director Community Relations & Israel Action Center – UPGRADE OF EXISTING POSITION FROM PART-TIME TO FULL-TIME AND AMENDED RESPONSIBILITIES TO INCLUDE PARTNERSHIP 2000

Reports to: Director Community Planning & Philanthropic Initiatives

Committee duties: Community Relations Committee, Overseas Committee, Partnership 2000 Committee.

Responsibilities:

- Develop and maintain effective liaisons with groups, individuals, and institutions in the general community that enable ongoing participation in fostering inter-group and inter-faith understanding and cooperation.
- Develops Federation's federal, state and local legislative agenda.
- Coordinates and participates in public policy advocacy efforts.

- Monitors the media consistent with regard to appropriate coverage of the Jewish community and Israel.
- Coordinate Jewish community security and liaise with appropriate law enforcement agencies and personnel.
- Liaise with the Director Marketing and Communications and communicate with the media on those issues relevant to the Federation, JCRC and its agenda.
- Responsible for developing and representing the Federation's interests in social action and social justice.
- Ensures development of high-level leadership among the lay community.
- Coordinate as appropriate with national and local Jewish groups on JCRC issues.
- Coordinate JCRC missions assist with other missions as needed, especially as missions relate with P2K region..
- Engage relevant audiences to support *B'Nai Tzedek* and Gift of Israel programs.
- Plan and direct community's participation in Partnership 2000.

Assistant – UPGRADE OF EXISTING POSITION FROM PART-TIME TO FULL-TIME

Reports to: Director Community Planning & Philanthropic Initiatives

Responsibilities:

- Administrative support to Community Planning and Development Department

Director Marketing & Communications – NEW POSITION (formerly structured through a part-time consulting arrangement)

Reports to: EVP

Direct reports: Associate for Community Campaign & Events, Managing Editor *Voice and Herald*.

Committee duties: Communications Committee

Responsibilities:

- Drive the development and implementation of a comprehensive strategic marketing plan that educates and engages the community around federation programs, issues and concerns.
- Provide strategic direction to the federation's communications, public relations and marketing efforts.
- Provide strategic development, management and supervision of the federation website.
- Set creative and graphic standards for the federation.
- Participate as a member of the senior management team and provide consultation to the President.
- Oversee the creation of a broad spectrum of communications, including e-newsletters, briefings, speeches and blended media presentations; serving as senior copywriter/editor.
- Define and build the branding of the federation as Rhode Island's Center for Jewish Philanthropy.
- Manage media outreach and response activities.
- Provide strategic guidance and support in the areas of marketing strategy and management to federation departments and partner agencies.
- Provide strategic direction for all web-based fundraising initiatives, including e-philanthropy, direct mail and telemarketing.

- Maintain solid relations with and serve as a resource to marketing/communications colleagues at local agencies and synagogues, and national agencies.
- Work with outside vendors and national sources to produce promotional videos/presentations.
- Maintain crisp understanding of target markets inside and outside the federation community.
- Direct annual community campaign.
- Supervise marketing/promotional aspects of Federation events.
- Supervise Managing Editor of the Voice and Herald.

Associate for Community Campaign & Events – EXISTING POSITION, REDEFINED RESPONSIBILITIES TO FOCUS ON EVENTS AND COMMUNITY CAMPAIGN

Reports to: Director Marketing & Communications

Responsibilities:

- Agency events
- Community annual campaign
- Marketing and communications assistance as needed

Chief Financial & Operations Officer – EXISTING POSITION, EXPANDED RESPONSIBILITIES TO INCLUDE OPERATIONS MANAGEMENT AND SHARED FINANCIAL SERVICES INFRASTRUCTURE

Reports to: EVP

Direct reports: Controller

Committee Duties: Finance/Audit Committee

Responsibilities:

- Financial and operation matters relating to the financial reporting, tracking and monitoring needs of the agency matters;
- Meet operations needs as they relate to human resources, supplies and office management, benefits and personnel practices, information technology and other administrative/operations functions as needed;
- Compliance with relevant statutes and agency policies and procedures;
- Coordination of the annual audit;
- Satisfactory performance of shared financial services and recruitment of new shared service clients;
- Development of new opportunities for shared operational/administrative services.
- Participate as a member of the senior management team.

Controller –TRANSFER FROM JCC CONSISTENT WITH SHARED FINANCIAL INFRASTRUCTURE IMPLEMENTATION

Reports to: CFOO

Direct reports: Accountant, three Bookkeeping Assistants

Responsibilities:

- Supervises shared financial/accounting services operations
- Assists CFOO

Accountant – NEW POSITION

Reports to: Controller

Responsibilities: Accounting as directed

Bookkeeping Assistant -- TRANSFER FROM JCC CONSISTENT WITH SHARED FINANCIAL INFRASTRUCTURE IMPLEMENTATION

Reports to: Controller

Responsibilities: Bookkeeping as directed

Bookkeeping Assistant -- TRANSFER FROM JCC CONSISTENT WITH SHARED FINANCIAL INFRASTRUCTURE IMPLEMENTATION

Reports to: Controller

Responsibilities: Bookkeeping as directed

Bookkeeping Assistant – EXISTING POSITION, REDEFINED TO ALLOCATE TIME TO VOICE AND HERALD

Reports to: Controller

Responsibilities: Bookkeeping as directed, Voice and Herald bookkeeping assistance (50% of time)

Footnote Information

- JFRI Campaign Allocation Percentage. In the 2003 UJC Peer Yardstick Review, JFRI's allocation was 14% versus an average of 23% for large-intermediate federations (the category UJC has assigned JFRI). Even though there might be differences in methodologies, JFRI's current allocation as measured by 2003 UJC peer yardstick appears to be 40% less than average.
- Excess investment earning earnings (excess recommended distributable income [rdi] on unrestricted endowment funds). Based on our current spending policy, annually we allocate 5% of the average of the previous 3 years unrestricted endowment fund balance for unrestricted grants. Our investment advisor, Prime Buchholz & Associates, has informed us that, in their opinion, we should expect an annual investment return of 9% from our portfolio. The excess rdi used in this plan was computed by taking this 9% anticipated return and applying it to the immediate prior year unrestricted fund balance, subtracting the 5% used for unrestricted grants, and further reducing it by the 1% administrative charge on endowment named funds. In order to diminish our reliance on this item, we have scaled back the use of excess rdi over the next 5 years so that it is 0 by the year 2012.
- JFRI Board Designated Pace Fund. This fund was established in 2004 with an initial value of approximately \$504,000 by amalgamating the following: (1) approximately \$105,000 of net investment income earned on JFRI's operating cash since 2000, and (2) approximately \$399,000 of excess campaign shrinkage that had accumulated over a number of years. The excess campaign shrinkage refers to the difference between the amount that we believe is uncollectible at the time that we determine our Annual Allocations and the amount that is ultimately uncollectible for that campaign year. Annually, the following items are added to the JFRI Pace Fund: (1) interest income on operating cash balances, and (2) excess shrinkage. Annually, 5% of the 3-year average value of the JFRI Pace Fund is contributed to the Annual Campaign. As of March 31, 2007, the value of the JFRI Pace fund was approximately \$675,000.