



Fiscal Years 2023-2025 Development Plan

August 15, 2022



2023 Campaign Leadership
Jewish Federation of Palm Beach County

Charles Gottesman, Development & Campaign Chair
Ilan Kaufer, Ben-Gurion Society Chair
Vivian Lieberman, Women's Philanthropy Campaign Chair
Ron Pertnoy, Corporate Sponsorship Chair
Betsy R. Sheerr, King David Society Chair
Ronda Starr, Women's Philanthropy Board Chair
Amy Terwilliger, Business & Professionals Chair
Joel Yudenfreund, Jewish Community Foundation Chair

Jewish Federation of Palm Beach County creates a safe, meaningful, and caring Jewish experience in the Palm Beaches and worldwide. The Annual Campaign is the centerpiece of our fundraising program. Its proceeds are strategically granted to local Jewish partner organizations, local Federation programs, and Israel & overseas Jewish partner organizations. Donors may also support specific needs through the Federation's Targeted Giving program, contributing to specific Jewish partner organizations and Federation programs locally and globally. Contributions meet today's needs through annual commitments, tomorrow's needs through multi-year commitments, and forever needs through endowments at our Jewish Community Foundation.

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Part I: 2022 – Year in Review

The Fiscal Year 2022 (FY22) Development Plan was our roadmap for the 2022 Annual Campaign and other fundraising efforts. Listed below are the principles and priorities for executing the plan and notable accomplishments.

Principles

- Meet the pressing needs of our community
- Focus on integrated philanthropy
- Build for our future growth and impact
- Prioritize the health and safety of our community and staff first

Priorities

- Accelerate results by further emphasizing personal relationships and investing in development services
- Welcome newcomers and companies relocating to our area
- Build holistic engagement and stewardship plans for top donors and potential donors
- Launch the Campaign for the Future quiet phase

Campaign Accomplishments

Together, our lay leaders, professionals, and donors have been part of something historic. We proved that we could accomplish whatever is placed in front of us and meet all of our community's challenges. Our community-wide 2022 Campaign advanced the unrestricted Annual Campaign, which is providing support during 2022-2023 to local Jewish partner organizations, local Federation programs, and Israel & Overseas Jewish partner organizations. Our 2022 Campaign helped to secure our near-term future through annual and multi-year pledges, and the long-term future with endowments at our Jewish Community Foundation.

We surpassed our community's budgeted goal of \$17.3 million and concluded the 2022 Annual Campaign at \$18 million. This result was vital, given that our community's unprecedented growth in recent years is creating rapid and significant increases in community needs, in addition to inflationary concerns on the budget of each partner agency and Federation program.

With our local community quickly approaching 200,000 people in Jewish households, thousands of new residents are interested in getting involved.¹ Therefore, we didn't simply reach out to existing donors from 2021 to reach our goals. We attracted two-thousand donors in 2022 who contributed for the first time or since 2020 or earlier. They were from all the communities and clubs and our businesses and associations. We provided everyone with an opportunity to participate.

¹ Ten thousand people in Jewish households moved to our service area from 2019 to 2021. Jewish Palm Beach is rapidly getting younger; 30% of the population is under 50 years of age. Over 100 financial services companies moved to Palm Beach County in the past four years, earning our area the label Wall Street South.

Total Fundraising Results

- Because of the inspiring dedication and leadership of our community members during the 2022 campaign year, [our community contributed \\$42 million in total giving:](#)
 - \$18 million to Federation's 2022 Annual Campaign, an impressive increase of 13 percent from just five years ago. We are grateful to Brian Seymour and his leadership as 2022 Campaign Chair.
 - \$8.7 million of the Annual Campaign's \$18 million total was contributed through Women's Philanthropy. Our thanks go out to Ronda Starr, 2022 Women's Philanthropy Campaign Chair and Sydelle Sonkin, 2022 Women's Philanthropy Board Chair.
 - \$15.6 million to sustain and build Jewish life in perpetuity through new endowments, including confirmed future promises, and other contributions at our Jewish Community Foundation (JCF) through the leadership of its chair Joel Yudenfreund.
 - \$5.6 million for local and overseas partner Jewish organizations and Federation programs.
 - \$2 million for our Ukraine Emergency Relief Fund. We also raised funds for Surfside.
 - \$169,000 in Corporate Sponsorships. Through Ronnie Pertnoy's leadership as Corporate Sponsorship Chair, the program increased 26 percent from just four years ago.
- The impact of these funds will echo for years to come and lead to a brighter, safer, and more joyful Jewish life in the Palm Beaches, in Israel, in war-torn Ukraine, and in Jewish communities worldwide. We are grateful to the donors, leaders, and community members who contributed to the 2022 Campaign.

Annual Campaign

- The Annual Campaign is our unrestricted drive and a top priority for its essential role in funding our partner Jewish organizations, Federation programs, and operations.
 - Our Annual Campaign is growing because of dedicated lay leaders, outstanding professionals, and our thousands of donors.
 - We are particularly proud of the new community members who are participating in the Campaign. The 2022 Campaign attracted nearly 1,000 Annual Campaign donors who didn't participate in the 2021 Campaign.
 - We relaunched the King David Society (KDS) under the effective leadership of Betsy Sheerr. KDS continues to be the major gifts centerpiece that will drive and position the content and education for all \$25,000 plus donors. This will be accomplished through programming and elevated community conversations (with newsletters, small gatherings, collateral material) for donors contributing \$25,000 plus.
 - Throughout the 2022 Campaign, the level of engagement among community members was wonderful, particularly given the changing conditions related to the pandemic. Our community members were donors, volunteers, and active participants in events such as Celebrating Philanthropy: A Major Gifts Event; Federation Day at Banyan Golf Club and High Ridge Country Club; Palm Beach Country Club Thank You Event; Ukraine Emergency Relief Fund Parlor Meeting in Frenchman's Creek, King David Society virtual and in-person briefings; Dignity Grows Parlor Meetings through Women's Philanthropy; Ben-Gurion Society and Business & Professionals Happy Hours, and more.

Women's Philanthropy:

- Women's Philanthropy – built on 2021's *Lions' Leap* initiative – by launching the *Change Your Eye Color* Campaign to encourage our Lions to increase to the next giving level. Fifty-one women changed their eye color, contributing \$516,000 in increased giving over 2021. That's a lot of rubies, sapphires, emeralds, amethysts, and canary diamonds now shining bright in Lion pins.
- Women's Philanthropy relaunched the Pomegranate Campaign through Nancy Beren's leadership. We secured 233 Pomegranates, and 75 of them made a first-time gift at this level.
- Women's Philanthropy is adding chips to Lion pins for donors with Lion of Judah Endowments of \$200,000 and more. These new chips are placed on the eternal flame.
- Women's Philanthropy created a new webpage [here](#) and a new giving page [here](#).

Jewish Community Foundation

- In 2015, our Federation's dual focus on the near-term and long-term future guided the creation of the Jewish Community Foundation (JCF). The JCF aims to significantly grow our community's permanent charitable resources. At the JCF's inception, we acknowledged that many of the community's philanthropists, who helped build Jewish Palm Beach, were aging. Without a new approach, they were unlikely to lend their annual financial support and leadership to the community of tomorrow unless we prioritized legacy giving. Thankfully, the JCF is making a big difference.
- Our assets under management have increased 39 percent to \$128 million² from seven years ago when we managed \$92 million.³ Dramatically expanding our assets ensures long-term financial stability and allows us to meet the growing needs of our community.
- We helped our Donor Advised Fund (DAF) Program's fund holders manage their charitable giving. In 2022, we facilitated grants totaling \$7 million that our fund holders recommended to non-profit organizations – mostly to Jewish organizations, including Federation and partner agencies.

Targeted Giving to Local Federation Programs, Local Jewish Partner Organizations, Israel & Jewish Overseas Partner Organizations

- **Arthur I. Meyer Jewish Preparatory (Meyer Prep)**, whose leaders have primary responsibility for its fundraising and regularly collaborate with Federation, continued to focus on its relationship-building efforts with parents, grandparents, and community members, resulting in a \$75,000 gift for its Learning Resource department, and two donations of \$25,000 used to match contributions to Meyer Prep's Annual Fund.

² The figure for total assets under management shall be gleaned from the April 2022 fundraising dashboard. From there, the calculation will need to be made to identify the percent increase from the 92 million figures from 2014 to the figure today (as of June 30, 2022).

³ The Planned Giving & Endowment (PG&E) Task Force recommended the creation of the Jewish Community Foundation in 2015 using data from 2014. It was charged with re-building the former PG&E Department.

- **Friedman Commission for Jewish Education (CJE)** secured \$521,000, proving that its individual giving strategy is gaining traction. Through this strategy, we provided Federation donors with the opportunity to make a supplemental gift to targeted areas. These gifts benefit our programs, such as lifelong learning, special needs, family engagement, Jewish Teen Initiative, and the Israel Program Center. Through the 2022 Campaign, CJE mounted a [Day of Awareness, sponsored by Anita & Robert Naftaly](#), and the [J-Impact Fund](#), which awards local organizations grants for teen programming open to all in the Jewish community. The J-Impact Fund’s lead donor is anonymous, and five organizations received awards.
- Our new collaboration with **Kavod Shef** matches gifts to provide emergency care for local Holocaust survivors. All contributions from Federation donors to Kavod Shef are matched on a 1:1 basis, and the services are provided to Holocaust survivors by Alpert Jewish Family Service. We are seeking to secure additional funding during the 2023 Campaign.
- The **Mandel JCC of the Palm Beaches** (Mandel JCC) surpassed its fundraising goal, having secured \$1.1 million or 14% above its \$950,000 goal, despite Mandel JCC programs being canceled or held virtually. Notably, the Barbara & Jack Kay Early Childhood Learning Center in Palm Beach Gardens secured nearly \$30,000 to renovate its playground. This effort promoted an emerging culture of philanthropy among families affiliated with the Mandel JCC.
- Donors continue to support *mosaic*, Federation’s public affairs TV show. During the 2022 Campaign, donors to *mosaic* contributed \$47,000 or 37 percent above *mosaic*’s \$34,000 goal.
- **OneTable** is being launched during the 2023 Campaign for young adults in the community, thanks to donors who supported it in 2022. The program will mount Shabbat events for the increasing number of people in their 20s and 30s in the Palm Beaches.
- Our **Ukraine Emergency Relief Fund** secured \$2 million to provide critical humanitarian assistance in Ukraine and surrounding countries. This inspiring total represents:
 - 2,000 community members making a difference.⁴
 - 86% contributed \$1,000 or less.
 - 70% contributed to Federation for the first time or not since 2020 or earlier.
 - 60% contributed online.
 - The generosity of Annual Campaign donors who made a supplemental gift to the Ukraine Emergency Relief Fund.
 - \$250,000 from local philanthropist Robert M. Beren to ensure Ukrainian Jews and refugees celebrated Passover.
 - Funding to sponsor nine flights for refugees from Eastern Europe to immigrate to Israel.
 - Generosity of Federation’s loyal donors. 47% of the total raised were contributed by Federation donors of 10 years or more.
 - Allocations by our local Israel & Overseas Committee to our Federation’s core partners — The Jewish Agency for Israel and The American Jewish Joint Distribution Committee — and other organizations on the ground in Ukraine.
 - Opportunities for Federation to thank its donors. Development officers will personally reach out to all Ukraine Relief donors of \$1,000 and more during the 2023 Campaign, at a minimum. Additionally, all donors will receive communications from the Federation, including event invitations.

⁴ This total includes 1,573 commitments representing the generosity of 2,000 individuals, at minimum.

- Our community is mounting the **Wexner Heritage Program** in the 2023 Campaign year, thanks to generous donors who committed \$180,000 during the 2022 Campaign. The Wexner Heritage Program is a premier leadership development program for lay leaders. We are seeking to secure an additional \$180,000 during the 2023 Campaign.
- Through our **Grants Program**, we received notable awards, including but not limited to:
 - Congressional Earmarks for Alpert Jewish Family Service: \$325,000
 - Florida Department of Education for Mandel JCC: \$35,157
 - Harold Grinspoon Foundation for Mandel JCC: \$20,000
 - Jewish Federations of North America [Seed the Dream] for Holocaust Survivor Staffing at Alpert Jewish Family Service: \$11,000
 - Jewish Federations of North America for Kavod Shef: \$20,000
 - Max M. & Marjorie S. Fisher Foundation for PJ Library: \$300,000
 - Max M. & Marjorie S. Fisher Foundation for OneTable: \$105,000
 - Nonprofit Security Grant Program (NSGP) for Alpert Jewish Family Service: \$88,635
 - Nonprofit Security Grant Program (NSGP) for Federation: \$150,000

Leadership

- One of the many successes of the 2022 Campaign — in addition to generating resources — is to foster volunteerism and to create and build community in support of a shared purpose. We strengthened our community of dedicated lay leaders during the 2022 Campaign; our shared purpose is a commitment to Federation and to serving the Jewish people.
- We accomplished these results with more than 150 Campaign volunteers and our professional staff. They demonstrated a solid commitment to each other and Jewish Palm Beach, putting Federation in a much stronger position and affording our community an exciting opportunity to move us forward.
- Brian Seymour, our 2022 Campaign Chair, completed his two-year term. Brian did an incredible job. He started in 2020 and began his term early with fundraising planning during the initial period of the pandemic. Brian led us to quickly pivot our strategy, proving that we will go above and beyond to care for the people of our local and global community.
- We would like to thank and acknowledge our incredibly strong 2022 Campaign leadership:
 - Ilan Kaufer, Ben-Gurion Society Chair
 - Ron Pertnoy, Chair of Corporate Sponsorships
 - Brian Seymour, Campaign Chair
 - Betsy Sheerr, Chair of King David Society
 - Sydelle Sonkin, Women’s Philanthropy Board Chair
 - Ronda Starr, Women’s Philanthropy Campaign Chair
 - Amy Terwilleger, Chair of Business & Professionals
 - Joel Yudenfreund, Chair of the Jewish Community Foundation

The names of the chairs of the nearly thirty committees of the 2022 Campaign will be recognized in the 2022 Honor Roll. We are grateful to them and the more than 150 lay leaders who serve on these committees.

- In recognition and appreciation of Hope Silverman's exceptional leadership as Board Chair during the 2021 and 2022 Campaigns and as one of the foremost effective campaigners for our local community, Federation established the Hope Silverman Campaigner of the Year Award. The annual recipient of the award will demonstrate leadership, encourage new and increased commitments to the Annual Campaign, and serve as a role model for their peers.
- The inaugural Hope Silverman Campaigner of the Year Award went to David Schulman in 2022. For over a decade, David has been a steadfast campaign leader at Frenchman's Creek. He has also served as Chair of its campaign, committee member, and event chair, while playing a critical role in the tremendous growth and expansion of Frenchman Creek's campaign.

Part II: Executive Summary of the 2023-2025 Development Plan

Introduction

Jewish Federation of Palm Beach County's 2023-2025 Development Plan reflects the President & CEO's Four Point Plan – *The Next Chapter* – unveiled at the 2022 Annual Meeting in May 2022. Our Development Program communicates the case for support for Federation's Campaign for the Future (CFTF) for 2023-2026 campaign years, the cornerstone of Federation's development strategy. Our multi-year Development Plan supports CFTF objectives to generate contributions to the Annual Campaign and Targeted Giving that support community needs today (through increased annual commitments), tomorrow (through multi-year commitments) and forever (through endowments).

Guiding Principles

- Focus on a holistic approach to donor stewardship, leading to growth in giving.
- Preserve our commitment to raising funds to meet the needs of Jewish Palm Beach and Jews around the world.
- Embrace a culture and practice that recognizes a donor's total giving, while also honoring and emphasizing the value of unrestricted, collective giving.
- Secure our future.

Priorities

1. Attract, cultivate, and steward the growth at the highest end of the giving pyramid, while nurturing all levels of giving. Build upon our efforts to engage with donors in relational ways, invite them to make meaningful gifts, recognize their contributions, and communicate the impact that we make in the community when we come together.
2. Educate major donors on the diverse ways of giving to Federation beyond the Annual Campaign. Increase the number of donors who make contributions that complement the Annual Campaign via endowments, designated gifts, multi-year commitments, and gift perpetuities. Support donors in their philanthropic efforts so that gifts are aligned with their interests as well as the needs of the global Jewish community.
3. The volunteer and professional partnership serves as the foundation of all fundraising efforts.
4. Promote programs and communications in high opportunity geographic areas of our community. Follow-up with program participants to increase the number of donors to Federation. Focus will be on engaging newcomers as well as retaining our loyal supporters. Ensure that programs are welcoming and demonstrate the impact donors make through Federation.
5. Communicate fundraising results in a concise and meaningful manner so that results inform action. Utilize different communication approaches for Board meetings, events, and other communications.
6. Create a physical, emotional, and spiritual connection with FRD volunteer leaders and the broader local Jewish community. Utilize storytelling and other creative means to inspire, educate, and engage additional leaders in Federation's mission. Build and strengthen the team of FRD volunteer leaders with the goal of securing more donations.

Part III: Our Community Today and Community Needs

Jewish Palm Beach is at a pivotal moment. We are in the midst of historic and booming growth, today one of the largest and fastest growing Jewish communities in North America. This growth is creating a surge of new needs, intensifying existing challenges and introducing bold opportunities.

As the “City Hall” of the Jewish community, Jewish Federation of Palm Beach County recognizes our role in strengthening our community today, tomorrow and forever. We step forward for the needs that we face this year, while building a community that is ready for next year, five years from now and 20 years from now.

Our goal is simple: be there for the Jewish community, no matter what – today, tomorrow and forever.

Federation leads a four-point plan (provided in the next section) to address current and emerging challenges that we face. We are driven by an aspiration to achieve a safe, meaningful and caring Jewish experience in the Palm Beaches and around the world.

All our work begins with community leaders and philanthropists like you. Whether you have been here for generations or recently moved here – it is your experiences, influence and resources that create transformational change locally and around the world. Donors, leaders, volunteers and participants fuel Federation’s ability to provide expertise, fortify our network of impactful partner organizations, and achieve innovative solutions.

We are persistently dedicated to the pursuit of developing ourselves and other Jewish institutions, driven by the belief that a rising tide lifts all boats. Federation deepens our partnerships and expands our network, growing the reach and impact we achieve together. Our finger is on the pulse of the community, focused on making decisions that are guided by data and with the future strength of Jewish Palm Beach as a top priority. We invest in people, as a flourishing Jewish community is only possible with passionate leaders, empowered professionals and connected community members who are committed to our shared values.

A core principle of our work is a commitment to being welcoming and inclusive to everyone who seeks to explore their connection with their Jewish community and identity. Guided by our Jewish values, we embrace our community’s growing diversity by offering opportunities to explore Jewish life in powerful, personal ways.

Our commitment to the people of Israel and Jewish communities around the world is unwavering. As Jewish people, we look after and stand up for one another. With a reputation for successful problem-solving, bold leadership and generous philanthropy, Jewish Palm Beach is consistently called upon in times of calm and crisis to care for Jewish people everywhere.

Your annual support for Federation is the driving force behind our work to meet the challenges and opportunities of today and tomorrow. As we look forward, contributions to our endowment secure our community forever – giving us greater day-to-day impact – and enable us to be nimble and stay ahead of every challenge that comes our way.

The strength of our Jewish community is defined by people like you playing an active in our vital work – with Federation as the central point that brings us all together to accomplish our shared vision.

Jewish Federation of Palm Beach County’s *four-point plan* addresses current and emerging opportunities and challenges facing the local and overseas Jewish communities, while expanding our community’s financial safety net to capitalize on emerging trends and unforeseen community needs. We aspire to:

Jewish Palm Beach, Israel, and Jewish Communities Everywhere

Care for People in Need

Financial, hunger and mental health issues are increasing in the local and global Jewish communities. Jewish Palm Beach faces a surging population of younger people, rising costs, shifting demographics, and seniors that require services to meet fundamental needs. Our local human service partners were primarily built to support an aging, smaller population. Globally, Jewish communities have enormous challenges: disadvantaged children and families, vulnerable seniors and Holocaust survivors, new immigrants to Israel, displaced Ukrainian refugees, and at-risk Jews living in places of conflict or distress around the world.

Our Response: Mobilize and expand our network of social service organizations to support the growing numbers of people in need.

Broaden Jewish Experiences and Learning for Children and Teens

Young families with children are the fastest-growing segment of the Palm Beaches' Jewish population, with tens of thousands of children and teens now growing up and coming of age in our community. Amid this local growth, family diversity requires innovative approaches to Jewish learning and connections with Israel and our global Jewish community. With Jewish programs often carrying costs, many parents feel that enrolling their children is out of reach as they struggle to afford basic living expenses. Meanwhile, misinformation about Israel and antisemitic comments on social media are alienating kids and dissuading them from feeling a sense of pride in their Jewish values and heritage. Offering access to Jewish experiences and learning opportunities helps kids understand and explore their Jewishness – vital to our Jewish future.

Our Response: Provide more children and teens with innovative, relevant and accessible experiences that deepen their connection with Jewish identity.

Protect our Jewish Community

Hate crimes are rising at alarming rates to the highest level in over a decade, and 2 in 3 religiously motivated incidents are anti-Jewish. Inaccuracies about the Jewish people and Israel are widespread on social media. These trends are sadly prevalent in South Florida and communities across the globe.

Our Response: Advocate to legislators, educate our community on identifying antisemitism and standing up to hatred, and lead security efforts that enable people to safely participate in Jewish life.

Connect People with Jewish Life

Booming population growth and diversity in Jewish Palm Beach require a wide range of relevant, accessible Jewish experiences for adults. The Palm Beaches are home to one of the largest, fastest-growing Jewish communities in North America. Jewish Palm Beach is getting younger and more geographically dispersed. A diverse community calls for Jewish experiences to be welcoming to all abilities, financial situations, interests, life stages and self-identification.

Our Response: Strengthen opportunities for adults to connect and celebrate Jewish culture, holidays and traditions in the Palm Beaches, Israel and global Jewish communities.

Part IV: Our Development Planning Process (SWOT Interviews & TOWS Analysis)

SWOT Analysis

To provide guidance and insight during the planning process, the Development Cabinet conducted a SWOT analysis, led by Charles Gottesman, Development & Campaign Chair.

A SWOT analysis (Strengths, Weaknesses, Opportunities, and Threats) is a strategic planning tool used by businesses as well as non-profits. It provides a structured planning method for decision making by leveraging our strengths and opportunities.

For Federation’s SWOT analysis, the Development & Campaign Chair interviewed ten donors (see appendix for the guided questions used in each interview). The individuals selected represent different age groups, geographic areas, and levels of engagement with the Palm Beach Federation. The interview results, which were reviewed and discussed by the Development Cabinet, are reflected below and were instrumental in our 2023-2025 development planning process.

Strengths	Weaknesses
1. Federation’s impact is clearly understood as an umbrella organization that meets needs both locally and overseas.	1. Federation’s visual/media communications are not always clear (i.e. some have the misconception that JFED has high overhead costs or many Gen X, Y, Z may have a false belief that all Jews have means).
2. Federation is necessary because only Jews will be committed to helping other Jews.	2. Federation is always soliciting for money and seeks increased gifts despite individuals loyally contributing.
3. Federation provides individuals with a strong sense of Jewish identity.	3. Federation lacks knowledge regarding its donor base (e.g., financial capacity, biography, preferences, and giving history).
Opportunities	Threats
1. There is significant Jewish population growth in PBC. This includes younger adults with more wealth and experienced donors from other areas.	1. Increased competition from Jewish and non-Jewish philanthropies.
2. The increase in antisemitism may lead to more funding and more relevant programming.	2. Financial environment – inflation, stock market fluctuations, possible tax deduction changes.
3. Greater focus on new trends – intermarriage, diversity, inclusivity.	3. Not all donors are interested in umbrella giving.

TOWS Analysis Insights

After finalizing the SWOT analysis, the Development Cabinet completed a TOWS analysis to provide actionable links between Federation and the current environment. It extends the SWOT analysis by offering a next step and actionable to-dos for Federation to take. The TOWS matches strengths with opportunities, and threats with weaknesses, thereby providing a solid understanding of both the internal and external environment. The result of the Development Cabinet’s TOWS analysis is provided below. Several of these tactics are incorporated into the FRD plan for the coming year.

Strengths-Opportunities	Strengths-Threats
<ol style="list-style-type: none"> 1. Incorporate information about Federation’s impact into Shalom Welcome Baskets. 2. Consider utilizing other media channels (e.g., ESPN radio) to reach newcomers. 3. Focus specifically on anti-Semitism education (not solely Holocaust education) in the schools. 4. Anti-Semitism is more widespread in the general community than one may imagine. Provide community members with more tools to fight the subtle anti-Semitism messages that they encounter. 5. Stress the joyous aspects of being Jewish (not just the negative). Host more community-wide events that bring people together to experience Jewish Life (CityPlace event was given as an example). 	<ol style="list-style-type: none"> 1. Determine ways to make Federation’s impact more tangible. Many do not understand what is meant by umbrella giving. 2. Utilize our marketing success to show how giving to Federation directly helps specific programs. 3. Better articulate our impact as a central address that can help during a humanitarian crisis. 4. Describe the level of specificity that can be achieved even when someone does collective giving. 5. Assess how the Federation name/tagline can better describe what we do like other non-profits (e.g., Healthy Mothers Healthy Babies).
Weaknesses-Opportunities	Weaknesses-Threats
<ol style="list-style-type: none"> 1. Create better visuals to describe our impact locally and overseas. 2. Visual imagery should also represent the diverse community that we serve (single mothers, intermarried families, Jews of color, etc.). Marketing materials should reflect the changes in what constitutes a family household. 3. Host outreach events in gated as well as non-gated communities to welcome newcomers. Need to find people where they are at. Host events to bring people together and develop relationships. Focus should be on friend-raising not fundraising. 4. Send out marketing materials that do not include a request for funding. The Passover mailing was given as an example. People appreciate receiving a nice Holiday card without a solicitation. 5. Consider brevity when sending marketing messages to the general community. When emails are too long, they may not be read and thus impact remains unclear. 	<ol style="list-style-type: none"> 1. Conduct more research on donor giving. Identify people who you can still ask during tough financial times. 2. Along the lines of #1 – hold-off on making asks to people who may be encountering financial distress. Instead, offer ways to be of assistance. 3. Develop “concierge-type” model. Get to know donors through one-on-one relationships. Gain more information about each donor before he/she is solicited. 4. Modify marketing communications so that people understand how collective giving allows Federation to direct resources to the most pressing needs.

Part V: 2023-2025 Planning Assumptions

Establishing a set of planning assumptions is considered the best practice for strategic planning during times of uncertainty. Below are the assumptions that Federation currently operates within. All are subject to change.

1. Federation’s core values⁵ guide decision-making about our 2023-2025 Development Plan.

- We are a *Kehillah* – Hebrew for “community”.
- We are a caring, kind, and compassionate community.
- We are welcoming and inclusive.
- We live the Jewish values of *K’lal Yisrael* – a shared commitment to one another.
- We champion the importance of Jewish learning.

2. Federation is committed to giving community members the opportunity to participate in the Annual Campaign.

Fundraising is the core objective of our organization. As a result, Federation should not be afraid to make “the ask”.

3. COVID-19 will be part of our future.

We will continue to be agile and respond to the changing environment around us.

4. The philanthropic sector will expand.⁶

Due to the increase in population and the number of wealthy individuals moving into our service area, we expect charitable giving to be strong in 2022⁷. We also recognize that there are a multitude of external threats, such as inflation, market volatility, economic downturn, political factors, and changes in tax laws, which may influence charitable giving.

5. Consistent with national trends, Federation will receive fewer gifts than years ago. Most funds will be donated by a smaller group of people.

Federations receive 60-70 percent fewer gifts today than in the 1970s.⁸ This finding is consistent with broader trends demonstrating that the percentage of Americans donating to religious causes has decreased from 46 percent in 2000 to 29 percent in 2018.⁹

Top donors have more money to contribute than in the past. Nationally, 10 to 20 percent of donors account for 90 percent of the dollars donated.¹⁰ Residents of the Town of Palm Beach are the third most charitable in the United States.¹¹ Therefore, our Federation prioritizes its investments in securing larger gifts, where we are seeing the fastest and most significant growth.

6. Younger donors, including new arrivals, are attracted to Federation. Some have the philanthropic capacity to make a major difference.

Some younger people are accumulating wealth and are ready to make an impact. Previously, most significant donors began making substantial gifts in their 60s. Contrary to some predictions,

⁵ <https://jewishpb.org/fed/index.php/core-values/>

⁶ <https://givingusa.org/trends-that-will-shape-philanthropy-in-2022/>

⁷ Business Development Board of Palm Beach County Mid-Year Report (October 2021-May 2022)

⁸ <https://avichai.org/wp-content/uploads/2018/03/Giving-Jewish-Jack-Wertheimer.pdf>

⁹ <https://scholarworks.iupui.edu/bitstream/handle/1805/26290/giving-environment210727.pdf?sequence=1&isAllowed=y>

¹⁰ <https://avichai.org/wp-content/uploads/2018/03/Giving-Jewish-Jack-Wertheimer.pdf>

¹¹ <https://www.helpadvisor.com/taxes-and-financial-abuse/most-charitable-zip-codes-report>

millennials continue to support traditional causes like Federation, attributing their commitment to values learned from family. They rank Jewish causes important, seek a hands-on role, and want their giving to impact big problems.¹²

7. Some donors are interested in supporting specific causes and projects.

We expect to see a growing interest in targeted giving for specific donor segments, requiring us to make the unrestricted Annual Campaign attractive while further weaving targeted giving into the fabric of Federation philanthropy.

8. The case for supporting the Annual Campaign may be more compelling because of a growing interest in giving circles by donors.

Donors are increasingly interested in acting collectively by contributing through a collaborative giving platform, such as a giving circle.¹³ A giving circle allows donors to make decisions, as a group, on how best to direct their charitable contributions. Given that our Annual Campaign is inherently a collective giving platform, we have a competitive advantage. We can position Federation like a community-wide collaborative giving platform and communicate that our leadership tackles complex issues through a large pool of funding, combined willpower, and expertise.

9. Federation's goals will increase because a growing community creates increased needs.

With an increase in population and changing demographics, there's a dramatic increase in needs. We will require special funding for security, combatting antisemitism, Jewish education, and supporting vulnerable populations. Our community requires resources to meet the growing demands locally and overseas.

10. It is becoming more difficult to grow the Annual Campaign with an increasing aging donor base.

Federation understands that it will eventually lose gifts each year due to the demographics of its donor base. This is the impetus for securing other revenue streams, such as bequests and endowments, to help offset potential losses. In addition to endowments, strategies to cultivate a new generation of major donors is vital to future revenue growth.

11. Total dollars into the community are valuable to meeting community needs.

Growth in giving is attributed to an intentional stewardship strategy that takes a balanced approach to all gifts, whether to the Annual Campaign or Targeted Giving, including endowments. Addendum II provides the Annual and Endowment Giving Levels for Donor Recognition Societies.

12. Our community is growing, and new residents will seek to get involved.

Ten thousand people in Jewish households moved to our service area from 2019 to 2021.¹⁴ Additionally, the Greater Palm Beach Jewish community is rapidly getting younger; 30% of the population is under 50.¹⁵ That percentage will increase as a significant influx of young individuals and families relocate to the Palm Beaches. Additionally, over 100 financial services companies moved to Palm Beach County in the past four years, earning our area the label Wall Street South.

¹² <https://wealthmanagement.bnpparibas/en/news/philanthropy-report-2017.html>

¹³ <https://www.bridgespan.org/bridgespan/Images/articles/releasing-potential-philanthropic-collaborations/releasing-the-potential-of-philanthropic-collaborations-2021.pdf>

¹⁴ Based on Florida Department of Highway Safety and Motor Vehicles, Palm Beach County census data, and growth rate estimates from World Population Review

¹⁵ According to our 2018 Community Study, “the community is significantly younger than in the past. In 2018, 30% of Greater Palm Beach Jewish adults are younger than age 50” compared to 2005 when “16% of Jewish adults were younger than age 50.”

13. Donors from Northern communities may choose Florida as their primary residence.

The Palm Beaches — and our local Jewish community — are experiencing transformational growth, diversity, and energy. We are home to one of the nation’s fastest growing and most desirable communities.¹⁶ Some donors, who did not anticipate changing their residence before the pandemic, are making the Palm Beaches their primary home.

14. Relationships — and not events — drive results.

Our ‘new normal’ will differ regarding in-person activities, such as Federation event attendance. Likewise, our constituents are experiencing “Zoom fatigue” with virtual events. We, therefore, must continue to prioritize relationship-building activities with community members. These activities, by their very nature, are nimbler than events.

15. The Campaign’s expense budget is key to successfully carry out the Federation’s mission.

16. Our planning will benefit from a SWOT analysis.

The SWOT analysis will guide conversations with donors about our development program's strengths and weaknesses and help us to define our opportunities and threats. Our planning process will be informed from other insights too.

17. Our FY23-25 Development Plan will be created through a collaborative process.

Our ability to carry out our mission rests upon the remarkable people who make up our community. We look forward to insightful, ambitious, and inspiring fundraising approaches from community leaders and staff members. We will consult with professional and lay leaders as part of the development planning process.

18. We will review our assumptions and results regularly.

Our planning assumptions will be reviewed and recalibrated regularly. Federation’s professionals will establish goals for all parts of the Development program, evaluate progress, and share insights with leadership.

¹⁶ Unacast, “We’ve Moved on. – Love, Miami: Emerging Areas in Florida” (2021) and U.S. Census Bureau, Palm Beach County Population (2020).

Part VI: 2023-2025 Guiding Principles

Federation embarks on the 2023-2025 fundraising years with strength and momentum, building on our 2022 accomplishments as our community's center for Jewish philanthropy. With an agile response to the changing environment, we will move forward as a community united in a common purpose, with an unwavering vision of "developing the human and financial resources necessary to ensure a vibrant Jewish future."

To guide our planning process, we established these high-level guiding principles for the 2023-2025 fundraising years:

- Focus on a holistic approach to donor stewardship, leading to an increase in giving.
- Preserve our commitment to raising funds to meet the needs of Jewish Palm Beach and Jews around the world.
- Embrace a culture and practice that recognizes a donor's total giving, while also honoring and emphasizing the value of unrestricted, collective giving.
- Secure our future.

Part VII: Aligning Priorities to Key Fundraising Programs and Initiatives

We created a specific plan for each part of Federation's development program that aligns with the 2023-2025 priorities introduced in the Executive Summary. Federation professionals collaborated with lay leadership to develop program plans for areas such as Women's Philanthropy, Business & Professionals, Gated Communities and Clubs, Ben Gurion Society, Jewish Community Foundation, Corporate Sponsorship, and others.

The following are examples of anticipated activities planned during the 2023-2025 Campaign. To organize the many initiatives listed below, they are grouped based on how they align with and advance our commitment to each of the 2023-2025 Priorities. These examples are not inclusive of all the activities that align with our priorities. Copies of each of the 50+ individual plans are posted on the Federation intranet for staff, and they are available to lay leadership through a professional partner.

PRIORITY #1: Attract, cultivate, and steward the growth at the highest end of the giving pyramid, while nurturing all levels of giving. Build upon our efforts to engage with donors in relational ways, invite them to make meaningful gifts, recognize their contributions, and communicate the impact that we make in the community when we come together.

1. **Launching the Jewish Palm Beach Leadership Circle** (Honorary Chairs: Richard A. Friedman, Peter May, and Jonathan Tisch). This new donor recognition program celebrates the visionary leaders of Jewish Palm Beach who provide the steadfast support needed right now. Members create transformative philanthropic impact through their ongoing annual commitment of \$50,000 or more to the Annual Campaign. Members are acknowledged annually in several publications, including the Palm Beach Daily News, and Federation's Honor Roll, in addition to being listed as the H. Irwin Levy Founders Event Committee.

2. **Sustaining our commitment to the King David Society** (relaunched in 2022, Chair: Betsy Sheerr). The King David Society recognizes annual commitments of \$25,000 and higher. KDS convenes meaningful and engaging conversations with global thought leaders so that members can learn from these notable guests, and from each other, about emerging trends and how we are impacting our community, Israel and Jewish communities around the world. The King David Society's 2022-2023 season will launch with a December 7, 2022, event at The Colony Hotel with Aliza Kline, President & CEO of OneTable.
3. **Mounting an exclusive mission to Israel and the United Arab Emirates in November 2022.** Chaired by Susan & Ron Pertnoy, this by-invitation-only experience is being offered for a select group of donors who contribute \$25,000 and more to the Annual Campaign. Participants will experience history in the making during this new era of acceptance and increased stability in the UAE. Many will visit Israel for the first time since the pandemic began. We anticipate having an opportunity to hear from Ukrainian immigrants in Israel.
4. **Launching Palm Beach Jewish Changemakers** (Co-Chair: Caroline & Nicholas Rafferty and Alexandra & Tal Bar-or). This cohort-based program convenes a select group of parents of young children. Over several months, they will assemble at home-hosted events and travel to Mexico City. Each participant can make a leadership gift and is committed to being part of our Jewish future. This initiative reflects our commitment to finding new ways for people to connect with our community and the "[youthquake](#)" popularized in the press.
5. **Continuing our commitment to our Gated-Community and Country Club Campaigns, Women's Philanthropy, and the Ben-Gurion Society.** These programs are at the heart of our historic success and foundational for our future growth. We plan to convene residents of Admiral's Cove, BallenIsles, Frenchman's Creek, Hunter's Run, Ibis, and Mirasol to celebrate our impact on community needs and to build connections between donors and potential donors with Federation and each other.
6. **Launching the Advisory Council to the Palm Beach Israel Business Alliance** (Chaired by Martin Cass in collaboration with the Palm Beach Business Development Board and BDO). The Advisory Council is a new Federation committee that advises on business development services that connect Israeli business principals with Palm Beach County's business community. Advisors consult with Israeli businesses and offer access to new corporate partners and customers, business development opportunities, potential funding programs, and capitalize on many other business needs. The program leverages Palm Beach County's booming economic development to establish a new Federation entry point for influential business leaders seeking innovative pathways to Jewish community. The Palm Beach Israel Alliance and its Advisory Council convened for the first time in the spring of 2022, and we look forward to supporting the council as it continues for a full campaign year as one of the Federation's newest committees.
7. **Creating a Major Gifts Chair for Women's Philanthropy.** Hope Silverman, a Prime Minister's Council Lion, is serving as the inaugural Women's Philanthropy Major Gifts Chair.
8. Launching the **Transformational Gifts Fundraising Process in 2022.** The internal program expands our ability to understand donors' backgrounds and interests and helps to identify and stimulate activity with potential donors. Through this program, a group of professionals meet on a weekly basis to review our engagement with potential donors, discuss cultivation strategies, revisit former action steps, and assess who is ready to be offered the opportunity to contribute.

9. **Publicly Recognizing 6-figure, 7-figure and 8-figure gifts.** We will publish listings of the members of the Jewish Palm Beach Leadership Circle (\$50,000-\$250,000+) at least once during the 2023 Campaign. We'll also announce multiple philanthropic commitments at the 7-figure and 8-figure level during this Campaign season and a select group of gifts of \$2.5M and higher monthly from November 2022 to April 2023. Releasing gift announcements in a steady stream creates frequent "touch points" with donors, which also provides Federation the opportunity to remind donors of the important work their gifts make possible. The consistent pace of announcements also creates familiarity with Federation's mission.
10. Hosting a traditional **fundraising gala**: We are considering hosting a formal black-tie event, which is consistent with our priority to target the upper end of the giving pyramid. If we host a gala, we will need to determine whether it would be an incremental event or replace an existing one (e.g., Celebrating Philanthropy) and how it advances Federation's fundraising model. As a next step, we will study the feasibility of hosting a traditional fundraising gala during the 2024 campaign, and we will make a recommendation to our leadership with options in October 2022.
11. **Acknowledge past donors at our Recognition Events. We seek to recognize past event honorees and leaders at our major events.** For example, we would publicize the names of past honorees of the Jeanne Levy Community Leadership Award during the speaking program of Celebrating Philanthropy. To operationalize this item, we will include on the checklist for remarks our expectation that past honorees and leaders are recognized in remarks.
12. Hosting a **golf tournament for high-potential donors and prospects.** This event would be targeted toward new donors, who are moving to the Palm Beaches and may be seeking this type of community activity. According to the Business Development Board of Palm Beach County (BDB) Mid-Year Report (October 2021 - May 2022), they have facilitated the relocation of 21 companies; many are part of the financial services industry¹⁷. We will conduct a feasibility study in 2023 for a possible tournament in 2024. Additionally, we will continue in 2023 with our acclaimed Federation Days at Banyan Golf Club and High Ridge Country Club.
13. **Formalizing our long-term strategy and near-term tactics to develop strategic relationships with firms, individuals, and families associated with the growth in financial services firms who are calling the Palm Beaches home** (aka Wall Street South). We are forming a lay task force that will result in recommendations that can be implemented for the 2024 Campaign.

¹⁷ Business Development Board of Palm Beach County Mid-Year Report (October 2021-May 2022)

Priority #2: Educate major donors on the diverse ways of giving to Federation beyond the Annual Campaign. Increase the number of donors who make contributions that complement the Annual Campaign via endowments, designated gifts, multi-year commitments, and gift perpetuities. Support donors in their philanthropic efforts so that gifts are aligned with their interests as well as the needs of the global Jewish community.

1. **Campaign for the Future (CFTF) is a multi-year comprehensive fundraising campaign that will define our community in the coming decades.**

Below are some key highlights about CFTF:

- a. With a working goal of securing \$250M in philanthropic funds, this campaign is the largest and most imperative in our community's history — with the potential to touch and transform every partner agency, local synagogue, and Federation program.
 - b. Campaign for the Future will recognize the entirety of our donors' philanthropic commitments during the CFTF counting period [7/1/21-6/30/26] through an array of giving options, including multi-year Annual Campaign and Targeted Gifts, and legacy gifts. This formula assures community members will be able to leverage their power to accomplish transformative change in their lifetimes and seal their legacy to Jewish Palm Beach for future generations.
 - c. As of July 31, 2022, Federation has already secured more \$101M in verbal and written commitments. Most of these funds come from philanthropists, who have a long-lasting relationship with Federation and have been instrumental in building and supporting the local Jewish community for over 25 years. These philanthropists have set the foundation for CFTF for others to follow.
 - d. Because a substantial sum has now been donated by a core group of foundational donors to CFTF, Federation is launching CFTF with our leadership stakeholders (major donors, lay leaders, partner agencies, and professional staff).
2. **Campaign for the Future will roll out more significantly to our core constituents during the 2023 Campaign** as we pursue the following:
 - a. Launch events for our closest stakeholders (staff of Federation and agencies, Board members and other lay leaders, and significant donors).
 - b. Systems to count, acknowledge, and recognize gifts, and to report on CFTF progress.
 - c. CFTF communication, marketing, and events strategy.
 - d. Training for professional and volunteer leadership on various aspects of CFTF.

3. **CFTF Cross-Functional Staff Task Forces have created to implement the necessary activities for the CFTF plan, as follows:**
 - a. Organizational Readiness: Leah Holczer (Chair), Elaine Aronoff, Sam Cahn, Jennifer Friedman, Elizabeth Klitzner, Frank Mandrell, Jennifer Matasavage, Fran Pensky, and Lynn Welton
 - b. Launch Events / Training / Communication Plan for Lay Leaders and Staff: Jeff Trynz (Chair), Christine Bongiorno, Michelle Guinane, Jeff Dawson, Mindy Hanken, Jessica Spilfogel, and Abbie Zohn
 - c. Messaging of CFTF & Community Priorities: Colin Shalo (Chair), Jennifer Friedman, Melissa Arden, Jennifer Stevens, and Hope Levin
 - d. Donor Cultivation + Solicitation: Hope Levin (Chair): Elaine Aronoff, Rachel Berg, Cecilia Ibanez, Melissa Hudson, Kate Lester, Shari MacKeen, Sarah Rogers, and Randee Schneider.
 - e. We're grateful to Leah Holczer, Jeff Trynz, Colin Shalo, and Hope Levin for serving as Chair of one of the four Task Forces. They will regularly convene with Michael, Matt, and Randee Schneider to carry out this work. We'll ensure that we're working closely with our leadership of Bill Meyer (Chair) and the CFTF Planning Cabinet, as well as keep the Federation Management Team and all Federation staff fully updated.
4. Briefing **our closest stakeholders on Campaign for the Future**. These sessions will take place on a rolling basis, including the following: August 18-19: Development Office Staff Retreat; August 31: All-Staff Retreat; October 25: Agency CEOs & Leaders; January 5 at 5 pm at the Federation Ambassador Workshop.
5. **Offer donors the opportunity to make multi-year pledges and endowment gifts and provide training to professionals about these donor options.** We will host a series of workshops throughout the year on functional items, as well as a monthly refresh at all-staff meetings.
6. **Establishing a to-be-named \$1 million+ recognition level for Campaign for the Future.** A list of these donors will be published in the fall and spring, based on their CFTF contribution level.
7. **Preparing for emergency campaigns and finding ways to leverage unexpected gifts to the Annual Campaign for the future.**
8. **Acknowledging Designated Giving and Endowments, in addition to the Annual Campaign, for each managed Gated Community and Country Club on the Fundraising Dashboard.** In addition to reporting on the Annual Campaign, we now include the amount raised for Targeted Giving for specific projects or Jewish partner organizations. This reporting reflects our ambitions to be donor centric by offering donors additional options on how they participate and contribute, while also communicating to our lay leaders and staff about our total fundraising progress.
9. **Utilize Federation's marketing channels to communicate how donors support causes through Federation that help our community today and for the short-term and long-term future.** We are streamlining the messages in our case for support and other communications. We focus on the value of giving for today (this year's campaign) and tomorrow (pledging for the next few years and paying overtime). Additionally, we communicate how donors make contributions to help the community forever (endowments at our Jewish Community Foundation).

Priority #3: The volunteer and professional partnership serves as the foundation of all fundraising efforts.

1. **Convening an ongoing Development Cabinet of senior lay and professional leaders** (Chair: Charles Gottesman). The Cabinet convened five times and resulted in the preparation of key documents including: Planning Assumptions, Guiding Principles, SWOT Interview Questions & Analysis, TOWS Analysis and FRD Priorities. The insight and feedback received during this process was incorporated into the FRD Plan. The Cabinet is available to meet on an ad-hoc basis to continue to provide strategic input and guidance on high-priority initiatives.
2. **Expanding the reach of Women’s Philanthropy through its Women’s Philanthropy Working Groups.** Historically, the Women’s Philanthropy Board was the only committee in Women’s Philanthropy. Now, we have Working Groups composed of both Board and non-Board members. This provides opportunities for Board members to help outside of Board meetings and non-Board members to become involved on a substantive level.
3. Launching the **Women’s Philanthropy Leadership Circle**, comprised of past Women’s Board and Campaign Chairs. Women’s Philanthropy Leadership Circle members are non-voting members of the Women’s Philanthropy Board of Directors unless they currently hold a Board position.
4. **Creating a strategy within each part of FRD to recruit more volunteer leaders.** Each Chair and professional are creating a succession plan as part of their FY'23-'25 plan. In addition, strategic plans are in place for all FRD programs. A list of FRD programs and professionals is enclosed.
5. **Recognizing the outgoing Board Chair with a fundraising event at the end of their term.** This idea will be considered by December 2023 for implementation during the 2024 Campaign. The fundraising event would recognize the outgoing Board Chair for their term of service.
6. **Recognizing Volunteer Leaders in Communications and Convenings:** To celebrate our lay leaders throughout our communications and convenings, when campaign leadership communicates with our volunteer leaders via email, we will honor and celebrate individual volunteers for their contributions. We will include a sentence to explain why the volunteer leader is being recognized and the leader’s broader contribution to the community. We aim to invite lay leaders to speak about their accomplishments at Federation Board meetings.

Priority #4: Promote programs and communications in high opportunity geographic parts of our community. Follow-up with program participants to increase the number of donors to Federation. Focus will be on engaging with newcomers as well as retaining our loyal supporters. Ensure that programs are welcoming and demonstrate the impact donors make through Federation.

1. **Leveraging community programming to encourage engagement in Jewish Life.** We will promote non-development, community engagement programs sponsored by Federation's programming division and our partner agencies. These include Israel 5K run, PJ Library, JCC Film Festival, Israel Days, Hanukkah Celebration, Good Deeds Day, and more. Through community programs, we extend our reach to parts of the community not actively managed by Development staff focused on specific Campaign affiliate programs.

2. **Hosting a community mission to Israel to mark Israel's 75 years of Independence.** A large delegation from Jewish Palm Beach will travel to Israel in April 2023 to celebrate Israel's 75th year of independence and learn about Israeli culture. The mission is led by:
 - Erna & Sam Liebovich, Chairs
 - Patti & Dan Lehrhoff, Recruitment Chairs
 - Beth Wayne, Young Leaders Chair
 - Hope Silverman, Post-Mission Arts and Culture Experience Chair
3. **Legacy programming to celebrate all planned gifts, regardless of level.** All donors with a legacy gift to Federation or our partner Jewish organizations, or who have a Donor Advised Fund with Federation, will be invited to a celebratory program in December 2022. Additionally, the JCF Newsletter will be distributed to supporters of 10+ years.
4. **We will promote the idea that everyone can participate in legacy giving, regardless of their level of giving.** Potential donors might be under the impression that legacy giving only applies to bigger gifts. Through our marketing, we will communicate that giving is possible for all donors.
5. **We are launching OneTable in the Palm Beaches.** OneTable is a national nonprofit organization that empowers people in their 20s and 30s to find, share, and enjoy Shabbat dinners. With leadership from Palm Beach Chairs, Amanda & Anthony Cummings, and a partnership with Federation, OneTable is launching in the Palm Beaches.
6. **We will explore the possibility of naming the Community Campaign.** It was suggested that we brand the Community Campaign — our effort to secure funds below \$1,000 largely through direct-response, telephone calling, and social media. We will provide a recommendation by December 2023 for possible implementation during the 2024 Campaign.
7. **We will include in our database PJ Library recipients, former Hillel participants, and Birthright alumni.** We plan to collect as many names as possible, including from the groups above, to share our communications. Subsequently, we will make reasonable efforts to include the names in our database for our communications.
8. **We will assess the feasibility of accepting additional payment methods (Venmo) and currency options (Bitcoin or real estate).** We will conduct a feasibility assessment of using other payment options, and then will roll-out, depending on the study findings. This possibility is being considered for implementation by our Finance Office in consultation with lay leadership.
9. **We will publish different versions of the Women's Philanthropy Newsletter.** We will create a shorter version of the newsletter to appeal to new people becoming acquainted with Federation. We will also create a second version for donors of two or more years.
10. **We will create an audio logo for implementation during the 2024 Campaign (potentially before).** An audio logo is a sound, an effect, a short music life, or voice over that lasts between 3-5 seconds, and is an important element of sound branding. Our intention is to use the audio logo at the beginning of events, *mosaic* episodes, as well as on social media and other relevant communication channels. We anticipate involving the creativity of the community in the audio logo development and selection process.

11. **We recognize that podcasts are another strong communications vehicle for sharing stories, building connection, and community building.** In 2023, Federation is piloting a podcast for [mosaic](#).
12. **Expanding our social media presence to include Instagram.** We are currently on Facebook, Twitter, and LinkedIn. However, we recognize that many donors and community members, particularly the younger generation, are also on Instagram. Therefore, as part of our work in the 2023 campaign, we are also committed to being on Instagram to reach others, share our work, and expand our community.

Priority #5: Communicate fundraising results in a concise and meaningful manner so that results inform action. Utilize different communication approaches for Board meetings, events, and other communications.

1. **We will holistically communicate our development program.** Our program – for both Annual Campaign and Targeted Giving – includes:
 - a. Annual contributions to meet current community needs.
 - b. Commitments made today and fulfilled in multiple years to allow for enhanced community planning and sustained impact.
 - c. Pledges to grow our endowment, providing the community with permanent financial support.
2. **We plan to include graphic representations of our fundraising success in emails to lay leaders and in the Development Chair board reports.** This fall, we plan to release new reports that will focus on total giving as represented in Campaign for the Future.
3. **Federation’s messaging is tailored and targeted for communications that strengthen donor relationships.** This work will be informed by professional and lay feedback, leading North American Federations, and industry research. Through stories, images, testimonials, and data about the causes, programs and organizations we support, our messaging presents a compelling case for donors to impact the local and global Jewish communities, through their philanthropy.
4. **Our Development Leadership will regularly communicate via email to professional staff and lay leaders.** In these communications, Development Leadership will share results in an easy-to-understand format that highlights fundraising strengths and opportunities. A stronger overall picture of current fundraising efforts will provide professional staff and lay leaders with a deeper understanding and clarify next steps to reach and exceed our fundraising goals.
5. **We will publish our annual Stakeholder Report in the fall and will ensure the publication is as welcoming and lay friendly as possible.** This is especially important for the growing number of newcomers to our area who might not be familiar with our work.

Priority #6: Create a physical, emotional, and spiritual connection with FRD volunteer leaders and the broader local Jewish community. Utilize storytelling and other creative means to inspire, educate, and engage additional leaders in Federation’s mission. Build and strengthen a team of FRD volunteer leaders with the goal of securing more donations.

1. **JCF plans to ask donors to share their self-stories.** JCF recognizes that giving is more than just a transaction; it is a meaningful gesture that provides an opportunity for connection with the community. We will highlight donors on the JCF website and distribute a publication that features donor stories, and their wishes for the future.

2. **Instilling joy, community, and teambuilding into our Ambassador Workshops for the lay-pro team.** Our lay leader development meetings aspire to be dynamic and fun. Two of our three sessions will occur in person rather than on Zoom to inspire and engage this vital team. We will also add a social component to one of the meetings so that the team can build trust and relationships. Building relationships is one way our lay team can stay motivated and fulfilled beyond the work and our collective contributions.
3. **Featuring donors and their reasons for giving in *the Stakeholder Report*, Honor Roll and the Jewish Palm Beach Leadership Circle.** By featuring quotes of our donors in publications, we can more deeply connect with donors and potential donors, by modeling examples of others who have donated. This will increase the bond with Federation, thereby inspiring donors to give.
4. **Sharing volunteer campaign accomplishments in Board meetings.** We want to recognize the success of volunteer leaders and create momentum for others to follow their leadership.
5. **Communicating the impact of Donor Advised Funds.** In our *Stakeholder Report*, we plan to report on the value of DAFs under management and the impact DAF distributions are having on our local and global community. In addition, by sharing our priorities with DAF holders, we are also providing them with an opportunity to contribute to specific areas of their choice.
6. A delegation from Palm Beach will attend the **International Lion of Judah Conference**, December 11-13 in Phoenix, AZ. Our delegation, chaired by Board Members Karen List and Carolyn Yasuna, will celebrate our own Vivian Lieberman, winner of the prestigious Kipnis-Wilson/Friedland Award for her years of service and generosity to our community.

Addendum I: SWOT Questions for Stakeholder Interviews

Strengths

1. What do you think Federation does best from a fundraising perspective?
2. What is the uniqueness of Federation's value proposition?
3. Which fundraising messages from Federation resonate most with you?
4. Why do you choose Federation when many nonprofit organizations ask for your support?
5. Do you have any other suggestions that we haven't yet covered?

Weaknesses

1. Where can Federation improve from a fundraising perspective?
2. What should we avoid, looking to the future?
3. What if anything makes you hesitant to give more?
4. Do you feel that Federation gives you a creative and informative environment to make the appropriate philanthropic gift?
5. Do you have any other suggestions that we haven't yet covered?

Opportunities

1. What external opportunities do you foresee in the next few years for Federation?
2. Are you aware of any fundraising trends that we should keep in mind at Federation?
3. How can Federation leverage the influx of new residents & businesses to Palm Beach County?
4. Is there a community need that Federation is not fulfilling right now?
5. Do you have any other suggestions that we haven't yet covered?

Threats

1. What external obstacles does Federation face today in our fundraising efforts?
2. Are other Jewish or non-Jewish institutions making a more compelling reason for giving?
3. Do you anticipate any future changes happening in our community and/or the fundraising industry that can threaten our ability to fulfill our goals?
4. Do you have any other suggestions that we haven't yet covered?

Addendum II: Annual and Endowment Giving Levels for Donor Recognition Societies

Lion of Judah Endowments

The following chart illustrates the amount needed to fully fund a woman's gift at the various Lion of Judah levels

Lion Level	Commitment Required to Establish Endowment
\$ 6,000 Lion	\$ 120,000
\$ 10,000 Ruby Lion	\$ 200,000
\$ 18,000 Sapphire Lion	\$ 360,000
\$ 25,000 Emerald Lion	\$ 500,000
\$ 36,000 Amethyst Lion	\$ 720,000
\$ 50,000 Sabra Lion	\$1,000,000
\$ 75,000 Zahav Lion	\$1,500,000
\$ 100,000 Prime Minister's Council Lion	\$2,000,000
\$ 250,000 Int'l Leadership Reunion Lion	\$5,000,000

Annual Campaign Endowments

The following chart illustrates the amount needed to fully fund a donor's gift at the various Annual Campaign Endowment levels. Additional levels are available.

Annual Campaign Level	Commitment Required to Establish Endowment
\$ 5,000 Gift	\$ 100,000
\$ 10,000 Major Donor	\$ 200,000
\$ 25,000 King David Society	\$ 500,000
\$ 50,000 Jewish Palm Beach Leadership Circle	\$ 1,000,000
\$ 100,000 Prime Minister's Council	\$ 2,000,000
\$ 250,000 International Leadership Reunion	\$ 5,000,000

Addendum III: 2023 Development Programs and Lead Professionals

Program/Constituency	Federation Professional
\$1M+ CFTF Stewardship	Jennifer Friedman
AC + DES Solicitation Management	Tatiana Rojas Anaya
Admirals Cove	Traci Pincourt-Braun
Agency (program) Board (committee) Campaign	Shari MacKeen
Ambassador Convenings	Tatiana Rojas Anaya
BallenIsles	Kate Lester
Banyan Golf Club	Elizabeth Klitzner
Ben Gurion Society	Sara Hassin
Board Chair Solicitation Management	Randee Schneider
Business & Professionals	Sara Hassin
Campaign for the Future (CFTF) / Gift Announcements	Randee Schneider
Campaign HQ Ambassador Emails	Tatiana Rojas Anaya
Campaign Kickoff	Michele Guinane
Celebrating Philanthropy	Traci Pincourt-Braun
Celebrating Philanthropy, Tribute Journal	Colin Shalo
CJE Fundraising	Shari MacKeen
Community Campaign and Direct Response	Colin Shalo
Corporate Sponsorship	Jeff Trynz
Designated Stewardship Reporting	Jeff Dawson
Development Cabinet	Randee Schneider
Donor Acquisition & Retention	Sarah Rogers
Eastpointe	Rachel Berg
Emerging Philanthropists (i.e., Palm Beach Changemakers)	Sarah Rogers
Event recruitment and evaluation	Michele Guinane
Federation Board Campaign	Randee Schneider
Financial Services / Wall Street South	Sarah Rogers
Frenchman's Creek	Kate Lester
Grants / Funding Requests / Donor Proposals	Samantha Cahn
High Ridge Country Club	Hope Levin
Hunter's Run	Elizabeth Klitzner
Ibis	Elizabeth Klitzner
Indian Spring	Rachel Berg
Invoices	Lynn Welton
Jewish Community Foundation	Elaine Aronoff
King David Society Plus program	Jennifer Friedman
Legacy Society and JCF Marketing	Jeff Dawson
Levy Founders	Hope Levin

Program/Constituency	Federation Professional
Lion of Judah Event Lead	Rachel Berg
Mandel JCC	Shari MacKeen
Messaging themes	Colin Shalo
Meyer Prep	Shari MacKeen
Mirasol	Traci Pincourt-Braun
Missions	Ronit Chia
<i>mosaic</i>	Bebe Novick-Brodigan
National Young Leadership Cabinet	Sara Hassin
Other Federation Programs Designated Giving	Christine Bongiorno
PAC	Sara Hassin
Palm Beach Country Club	Hope Levin
Palm Beach Federation Leadership Circle	Hope Levin
Palm Beach Israel Business Program	Jeff Trynz
Pledge Acknowledgements	Giselle Marquez
Pledge Fulfillment	Tatiana Rojas Anaya
President/CEO Chair Solicitation Management	Debi Devigili
Reporting & Analysis	Lynn Welton
Staff Campaign	Sara Hassin
Stakeholder Report	Colin Shalo
Thank You Committee	Traci Pincourt-Braun
Transformational Gift Fundraising Team	Randee Schneider
Women's Philanthropy - Lions +	Rachel Berg
Women's Philanthropy - Outreach & Engagement	Rachel Berg
Wycliffe	Rachel Berg