

MAY 2024

Strengthening Federation for the Future



JEWISH FEDERATION OF PALM BEACH COUNTY STRATEGIC PLAN 2025-2027

KEY STRATEGIC DIRECTIONS

CORE FUNCTIONS

- ▶ **Philanthropy**
Growing Total Financial Resource Development and the Donor Pipeline
- ▶ **Community Engagement**
Catalyzing Deeper Engagement and Connecting People with Jewish Life
- ▶ **Network**
Strengthening the Network of Community Partners and Agencies
- ▶ **Antisemitism and Community Relations**
Increasing Awareness to Combat Antisemitism and Hatred
- ▶ **Israel and Global Responsibility**
Deepening Relationships to Israel and Global Jewish Peoplehood

OPERATIONS

- ▶ **Talent**
Building Federation Capacity and Prioritizing Lay and Professional Talent
- ▶ **Constituent Journey**
Centering People Through Operational Excellence
- ▶ **Impact**
Metrics, Planning and Research

LEADERSHIP MESSAGE

The Jewish Federation of Palm Beach County works to strengthen Jewish identity, energize the relationship with Israel, meet human needs that are uniquely the obligation of the Jewish community, and develop the human and financial resources necessary to ensure a vibrant Jewish future.

The Federation last developed a strategic plan in 2012 and implemented a community study in 2018. Since then, the Jewish community and greater Palm Beach has changed drastically. Economic shifts, a global pandemic, the war in Ukraine, major local demographic shifts, significant growth of the Federation, and more recently, the October 7th terrorist attack on Israel and ensuing surge of antisemitism, have all impacted the Federation and its mission.

Now is a critical time for the Federation to reflect on its current work and operating environment and define priorities for the next chapter of the Federation's growth. To lead this, a Strategic Planning Task Force was formed in December 2022 and included the following members: Jim Baldinger, Barry S. Berg, Pamela Comiter, Steven Ellison, Stephanie Gitlin, Chris Goldberg, Ron Herman, Bob Herzog, Scott Holtz, Jason Kalisman, Roslyn Leopold, Robert Naftaly, Cindy Schlossberg, Alyson Seligman, Kevin Shapiro, Susan Shulman Pertnoy, and Hope Silverman.

In addition, to guide and support this effort, the Jewish Federations of North America (JFNA) served as the Federation's planning consultant.¹ JFNA led the Task Force and leadership through a 16-month process that included four key phases: 1) defining an essential planning question/key focus of plan; 2) establishing the current state of the Federation; 3) determining strategic directions; and 4) developing a measurement and implementation plan.

The Task Force set out to answer how the Federation, given the growing number of opportunities and needs, can prioritize its work for the greatest impact. They examined the Federation's current state, the priorities of leadership, internal capacities and operations, its relationships with local partner agencies and organizations, and local community engagement, philanthropic, and Jewish life trends. The process clarified the unique position the Federation has at a time of unprecedented growth locally within a highly volatile domestic and global climate.

Critically important to this process was the regular and ongoing dialogue with key stakeholders, regularly updating them on the process, soliciting feedback, and seeking approval at key junctures. This included staff, both senior and all-staff forums, the Past Board Chairs of the Federation, professional leadership of partner agencies, and the Federation Board. The Federation is grateful to all the stakeholders that participated in this process. Critically, none of the work could have been completed without the strong input of the Strategic Planning Task Force. The Federation is deeply appreciative for the time, effort, and leadership they invested in the process.

The resulting strategic plan capitalizes on the existing internal strengths and external opportunities while positioning the Federation to address internal weaknesses and navigate external challenges. Critically, the plan will position the Federation to go from 'strength to strength,' firmly positioned to meet the needs of a growing and dynamic Jewish Palm Beach while ensuring our responsibility to Israel and the global Jewish people.

Steven Ellison, Chair, Strategic Planning Task Force
Susan Shulman Pertnoy, Board Chair, Jewish Federation of Palm Beach County
Michael Hoffman, President & CEO, Jewish Federation of Palm Beach County

¹ Jewish Federation's Chief Community and Jewish Life Officer, Sarah Eisenman, and Elan Kramer, Senior Director of Community Engagement, led this process. In addition, the full range of JFNA resources were leveraged, including from the Impact & Growth, Talent, and FRD divisions.

CURRENT STATE ANALYSIS SUMMARY

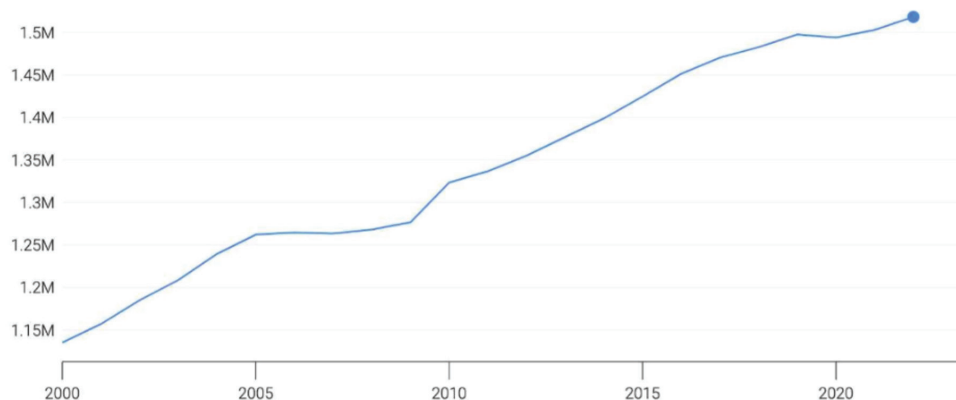
Conducting a thorough analysis of the current state of the Federation was critical to the planning process.² A SWOT analysis was used to build an overview of the organization’s Strengths, Weaknesses, Opportunities, and Threats. The interviews and roundtable discussions conducted from December 2022-May 2023 surfaced several primary themes, focused on both internal strengths and weaknesses as well as external opportunities and threats/risks. This strategic plan aims to address the findings outlined below, with the SWOT analysis serving as a valuable foundation and shared understanding among the Task Force, board, and staff on the current state of the Federation. The following highlights the key observations and major themes that emerged.³

Looking internally, the consulting team found that the Federation boasts several core strengths, including its professional leadership with excellent senior management retention and a nimble team known for its positive can-do attitude. Passionate and committed staff, a robust lay leadership pipeline, and fundraising prowess, marked by an increase in major gifts and high-touch engagement, contribute to the Federation’s tangible and positive impact both locally and overseas. The Federation has reestablished credibility within the community after some tenuous years, has strong relationships with partner organizations, who also acknowledged the essential role of the Federation in stabilizing some of their organizations, and successful engagement through initiatives like the Dorothy & Sidney Kohl Jewish Volunteer Center. However, challenges such as addressing negative perceptions, staff burn-out, aligning fundraising and programming strategies, clarifying Federation’s identity and role, strengthening community planning and allocations, and improving data management and usage need attention.

In terms of external opportunities and threats, Palm Beach County is one of the most high-potential areas in the country for Jewish philanthropy and community engagement, with ongoing growth in population and wealth. The Federation can deepen engagement within its current catchment area to reach underserved areas where the Jewish population has continued to grow. In addition, the Federation is already establishing itself as the key Jewish organization responding to civic issues and can offer avenues for broader community involvement. The Federation also faces threats such as high philanthropic competition in the area, a large and varied catchment area with a rising cost of living, a significant proportion of unengaged members of the Jewish population, and a more sophisticated philanthropic landscape.

Palm Beach County, FL population from 2000 to 2022⁴

Palm Beach County had an official estimated population of 1,518,477 on July 1, 2022



² All interviews and roundtable conversations occurred prior to the October 7, 2023 terrorist attack on Israel, and as such Israel did not surface as a major theme during this phase. However, this watershed moment’s impact, both in Israel and locally, will continue to unfold and the Task Force determined that a focus on Israel was essential.

³ The above reflects a high-level summary of key findings. The consulting team gathered extensive information on the current state, which will be available to the Federation as it works to implement this plan.

⁴ Based on U.S. Census Bureau Data.

STRENGTHS

- Professional leadership
- Lay leadership caliber and pipeline
- Staff: passionate, committed, empowered
- Relationships with partner organizations in the community
- Fundraising prowess and high-touch engagement
- Tangible and positive impact
- Credibility within community
- Kohl Jewish Volunteer Center

WEAKNESSES

- Public perception/understanding: breadth, impact
- Alignment of FRD* and Programming strategies
- Organizational planning and priorities (internal)
- Clarity of roles between Federation and partners
- Prioritizing major gifts versus growing pipeline/base
- Data systems, usage, and informed decision-making
- Staff capacity, retention and ongoing unfilled roles, onboarding, efficient hiring processes, and training
- Measuring impact of all Federation investments
- Clarity of allocations process
- Community planning and research

OPPORTUNITIES

- Growth of population, diversity, and wealth
- Underserved areas and demographics
- Leverage high profile for civic issues/ combating antisemitism

THREATS

- Competitive philanthropic market
- Increasingly sophisticated philanthropic marketplace
- Large and varied catchment area
- Increasing cost of living in Palm Beach County
- Lack of Jewish connection for many in community
- Compelling global reach at a time of high local needs

* Financial Resource Development



KEY STRATEGIC DIRECTIONS 2025-2027

The Task Force, with the endorsement of the Board, identified and affirmed eight Strategic Directions as “Pillars for Success”. These directions fall into two categories: Core Functions and Operations.

CORE FUNCTIONS

Philanthropy

Growing Total Financial Resource Development and the Donor Pipeline

The Federation has more than doubled total giving from \$27 million in 2019 to \$56 million in 2023. Furthermore, the Federation's Annual Campaign has experienced a 20% gain since 2019, reaching \$19.4 million in 2023. The Federation is known to many donors for its personal and high-touch engagement approach, where donors feel welcomed and valued.

From 2024 to 2026, the Federation will continue to implement the Campaign for the Future plan with the already established fundraising targets. During this period, the Federation will prioritize building the right systems and making operational upgrades to ensure excellence and positioning itself to reach new levels of total giving. For 2027, following the completion of the Campaign for the Future and with upgrades in place, the Federation will identify an increased goal for Total FRD and the Annual Campaign.

This past year's events have reaffirmed the need to maintain nimbleness to address unforeseen challenges and opportunities, emphasizing the importance of continuing to increase the Annual Campaign.

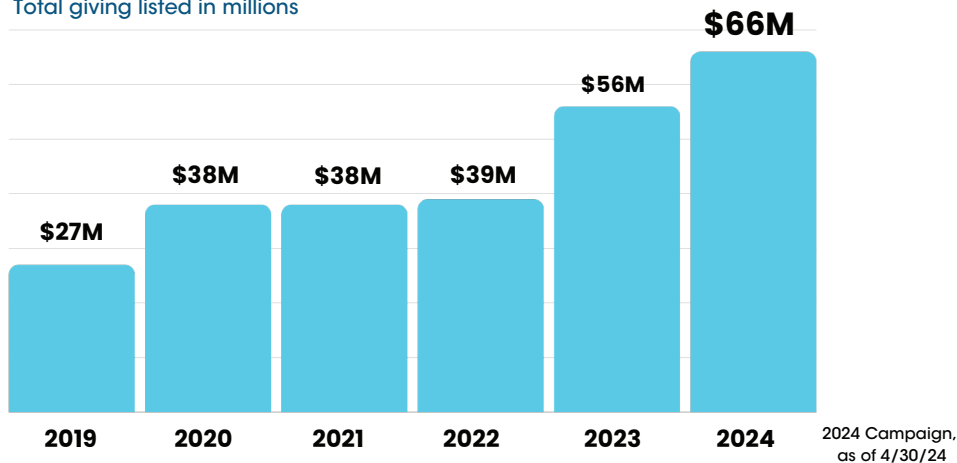
While the Federation has been successful at increasing the number of dollars raised annually, it will aspire to increase the total number and type of Annual Campaign donors. This includes emphasizing younger donor development opportunities and ensuring donor attrition does not exceed 2%.⁵

To add to this, the Federation will develop a comprehensive and integrated "constituent journey" between its philanthropic efforts and its engagement programming. This will involve aligning FRD and Program strategies and developing a centralized process to track, communicate, and steward program participants, ensuring a seamless transition, where appropriate, to the fundraising 'funnel' and vice versa.

Additionally, the Federation plans to continue to enhance the William A. Meyer Jewish Community Foundation by including a philanthropic advisory service portfolio and by expanding its number of Donor-Advised Funds (DAFs). This will further position the Federation as Palm Beach's premier center for Jewish philanthropy.

Surge in Total Contributions

Total giving listed in millions



⁵ Of note, Palm Beach Federation data indicates donor attrition is around 2%, which is half the rate of other comparable federations.

CORE FUNCTIONS

Community Engagement

Catalyzing Deeper Engagement and Connecting People with Jewish Life

Recognizing the growing population and ongoing demographic diversification within Palm Beach, the Federation will first prioritize deepening its role and increasing its visibility within its current catchment area, before looking to expand. This includes increasing engagement in key geographic areas such as Boynton Beach, Downtown West Palm Beach, and Wellington.⁶

The Federation, in collaboration with its partners, will prioritize developing targeted programs and initiatives designed to resonate with a diverse range of demographics, reflective of the growing diversity of the residents and families living in the area, including 55+ adults, families, business professionals, young adults, and teens.

Where appropriate, the Federation will aim to increase engagement both programmatically and philanthropically.

Finally, to strengthen its role as a catalyst for Jewish life in Palm Beach County, the Federation will clarify its Jewish Life and Engagement strategy by: 1) prioritizing and aligning programs; 2) setting parameters for direct programming, partnerships and/or handoffs to community agencies; 3) integrating family engagement efforts across programs; 4) ensuring that Friedman Commission for Jewish Education (CJE) strategies are relevant and meeting community needs; and 5) ensuring alignment between the Federation's engagement and allocations strategies.

Network

Strengthening the Network of Community Partners and Agencies

The Federation recognizes the importance of its role in providing direct engagement programming to meet broader community needs, while simultaneously being committed to supporting a thriving network of partners and agencies to serve the evolving needs of the Palm Beach Jewish community. With the growing strength and stability of local agencies and synagogues, the Federation will look to function as the research and development arm and incubator of the community, identifying unmet needs, developing local agency capacities to address them effectively, and directly responding where gaps remain. Furthermore, the Federation will conduct a cross-agency engagement and programming gap analysis to identify areas where there are unmet needs or opportunities for collaboration. Funding could be allocated to agencies and partners to address these gaps and build their capacity to respond.

Furthermore, the Federation will work to align its investments, staff structure, and resources with its priorities. This may involve transitioning certain Federation-incubated programs to partner agencies to ensure effectiveness and reduce duplication. The Federation is prepared to begin this process with its teen engagement programming.

The Federation will work to strengthen how it communicates its identity and evolving role within the community. This will enhance understanding of the scope of Federation offerings for community institutions, synagogues, and partner agencies and strengthen collaboration. In addition, with key partners, the Federation will move towards communicating the 'total investment' and not only allocation funding.

Additionally, the Federation will review community infrastructure needs. As the community has grown and evolved in recent years, this assessment will help the Federation identify where additional resources may be needed across its network of community partners and agencies.

⁶ During the implementation phase, work should be done to establish a baseline of current engagement levels in this area and determine the right rate of increase over a three-year period.

CORE FUNCTIONS

Antisemitism and Community Relations

Increasing Awareness to Combat Antisemitism and Hatred

The Federation is dedicated to combating rising levels of antisemitism and hatred and ensuring the safety and security of the Palm Beach Jewish community. Central to this effort is the newly established Palm Beach Center to Combat Antisemitism & Hatred, which will drive the Federation's vision in two key areas: 1) building allyship and strengthening relationships beyond the Jewish community; and 2) enhancing communal safety and security.

One of the primary goals in this area is to significantly increase the number of non-Jewish influential people who speak up publicly about antisemitism and who partner with the Jewish community to end this hate through legislation, educational policy and curricula, and programming. Additionally, the Federation plans to offer additional missions to Israel for key leaders and influencers in the community, further strengthening connections.

To enhance security, the Federation plans to grow the Center's capacity to serve the safety needs of the Palm Beach Jewish community. This includes physical security upgrades, access to ongoing security support, training, and securing resources from local, state, and national law enforcement sources.

The Federation also aims to deepen partnerships with local secular organizations and increase public visibility to display its commitment to civic engagement and its fight against all forms of hate. This includes maintaining a presence at important community-wide events to amplify the Federation's visibility and stance against antisemitism and hatred. Of note, this work is also seen as a valuable Jewish engagement tool.

Israel and Global Responsibility

Deepening Relationships to Israel and Global Jewish Peoplehood

Critically, this plan affirms the Federation's commitment to an enduring relationship with the people and State of Israel, ensuring a flourishing Jewish national home. Additionally, the Federation will continue to prioritize its obligation to support Jews in crisis in Ukraine and around the world. As the war in Israel is ongoing with many unknowns, the Federation recognizes that it is too soon to specify all the ways in which it will respond post-10/7, and an assessment of longer-term needs will be imperative. This work will be a priority for the Implementation Committee following the release of this Strategic Plan. In the interim, the Federation will continue to offer meaningful opportunities to mobilize community members in support of Israel and global Jewry through volunteerism, education, and philanthropy.

To strengthen its impact and ensure a cohesive approach, the Federation will internally align all Israel-related portfolio areas, including its work related to Israel Education, Partnership2Gether, and the Stacey & Mark Levy Center for Israel & Overseas.

The Federation will place a focus on developing and implementing educational programs that emphasize Israel's cultural, historical, and contemporary significance. These programs will aim to increase awareness and understanding of the current situation in Israel, dispel misconceptions, provide a nuanced understanding of Israel's complexities, and foster lasting connections to global Jewish peoplehood.

OPERATIONS

Talent

Building Federation Capacity and Prioritizing Lay and Professional Talent

The Federation will conduct a comprehensive review of its organizational structure and ensure its competitiveness in the employment marketplace. This review will help identify any areas where adjustments may be needed to attract and retain top talent.

To attract qualified professionals, the Federation will develop a strategic recruitment plan. This plan will outline targeted strategies for attracting candidates with the skills and experience needed to fill key roles within the organization and decrease the number of unfilled positions. Furthermore, the Federation will increase the number of support/administrative level staff positions to provide essential support for its growth and operations.

It is also critical for the Federation to streamline its hiring process to minimize the time it takes to fill roles and ensure a smooth onboarding experience for new hires. A thorough onboarding curriculum and training program will be developed to support this effort.

In addition to attracting new talent, the Federation will focus on further developing its existing employees. This includes expanding staff development, mentorship, coaching, and training programs to help employees meet the ambitious goals of the Federation and increase retention.

Finally, the Federation will continue to develop a strong lay leadership pipeline and maintain robust succession planning. This ensures that the Federation continues to cultivate the leadership needed to guide the organization forward and achieve its long-term goals.

Constituent Journey

Centering People Through Operational Excellence

It is critical that the Federation makes substantial upgrades in its data systems and relationship management to create a people-centered journey for all populations with which it engages. The Federation will address its current weaknesses in data collection, tracking, and usage by investing in a new and advanced Customer Relationship Management (CRM) system, supported by staff training.

The Federation will define a vision for its data systems and their potential uses across the organization, ensuring that all teams within the organization are aligned and engaged in leveraging data effectively. This vision will guide the implementation of the new CRM system, which will support engagement, leadership, and fundraising operations to build a Federation-wide, relationship-based "constituent journey" effort.

A comprehensive review of current constituencies in the database will be conducted to ensure accuracy and completeness. This includes segments such as young adults, solidarity event participants, first-time donors from the Israel Terror Relief Fund, gated community and country club members, PJ Library families, and additional groups.

To create a more personalized experience for all its constituents, the Federation will build a "people-centered constituent journey" plan, which will streamline data entry processes, identify key junctures and communication touchpoints for different profiles, and develop a more strategic approach to relationship development and management.

OPERATIONS

Impact

Metrics, Planning and Research

As the Federation continues to grow and serve an increasingly sophisticated philanthropic market, building a more robust approach to organizational planning, measuring impact, and community research is essential.

The Federation will ensure that all its investments, both through partners and Federation direct programs, have clear metrics to evaluate impact, achieve desired goals, and maximize return-on-investment.

To achieve this, the Federation will establish and prioritize a data management strategy for all programmatic investments. This strategy will ensure accurate, real-time data collection, enabling the Federation to measure impact, assess program effectiveness, and make informed decisions.

Additionally, the Federation will strengthen its planning capacity, both internally through building a culture of cross-departmental planning, and externally through community planning efforts. A “Center for Research and Planning” is needed, and the Federation has the potential to serve as a hub for community research and data-driven insights about the current and future state of Palm Beach County.



IMPLEMENTATION AND MEASUREMENT

An Implementation Committee will be created to ensure oversight, successful delivery, measurement, and execution of the plan. To support the implementation process, a Strategic Plan Implementation Tracking Tool (see pg.12) has been created. This tool can be used to regularly update staff and leadership on progress and ensure transparency and accountability.

Based on the proposed strategic directions, there are several priority areas that will likely require additional resources and others in which there may be potential savings through improved efficiencies.

ADDITIONAL RESOURCE NEEDS:

- To create an exceptional constituent journey, the Federation will need to invest in a new CRM system and staff training. This will include funding for software development and implementation.
- To expand the planning capacity of the Federation, the organization will need to invest in data management, planning, and research. This will include funding for data analytics tools and staff resources.
- The Federation will need to invest in recruiting, training, and retaining top talent. This will include funding for staff development, recruitment, and retention efforts.
- To catalyze deeper engagement in Jewish life, the Federation will need to invest in developing targeted programs and initiatives for key demographics and geographic areas. This will include funding new programs, partnerships, and outreach efforts to increase community engagement.
- The Federation will need additional funds to meet both community infrastructure needs and strengthen the capacity of agencies to address gaps.

POTENTIAL RESOURCE SAVINGS:

- Through aligning and prioritizing its investments, the Federation may be able to reallocate professional and financial resources by handing off certain programs to partner agencies for execution.
- The Federation may be able to streamline operations and reduce costs through improved efficiencies in data management, planning, and program delivery.

PROPOSED MEASURES OF SUCCESS:

- Increase staff retention and reduce the average number of open positions.
- Using the annual Leading Edge⁷ workplace survey, aspire to increase Federation scores around staff capacity, workload, compensation, and transparency.
- Maintain donor attrition rate of no more than 2%.
- Increase number of new donors originating from Federation-run engagement programs.
- Increase engagement in Jewish life in the current catchment area, particularly Boynton Beach, Downtown West Palm, and Wellington. (Will need to establish current baseline).
- Meet targets set in the Campaign for the Future plan.
- Staff have been trained and use the new CRM regularly to inform their work and decision making.
- Staff have access to real-time constituent reports, including participation, communication, and donations.
- Staff, donors, and lay leaders report improvement in consistent, accurate, timely communication and reporting.
- Stakeholders report understanding/an improved understanding of the Federation's impact and use of funds.
- Partners report an improved understanding of the Federation's role and work, specifically related to allocations and Federation direct programming.

⁷The Leading Edge Employee Experience Survey is offered annually to help Jewish nonprofit organizations understand and improve how their employees experience work. The survey identifies organizational strengths as well as growth areas to be addressed for improving workplace culture.

STRATEGIC PLAN IMPLEMENTATION TRACKING TOOL

PLANNED YEAR COMPLETED YEAR VARIANCE

| PHILANTHROPY | | | |
|---|--|--|--|
| From 2024-2026, make system and operational upgrades to ensure excellence and ability to deliver total FRD strategy. | | | |
| Identify an increased goal for Total FRD and the Annual Campaign for 2027, following the completion of the Campaign for the Future and with upgrades in place. | | | |
| Increase the total number and type of annual campaign donors through emphasizing younger donor development opportunities. | | | |
| Develop a comprehensive, integrated 'constituent journey,' aligning philanthropic and programmatic strategies, and creating a centralized, seamless process to steward program participants. | | | |
| Enhance the William A. Meyer Jewish Community Foundation to include a philanthropic advisory services portfolio and expand the number of DAFs. | | | |
| COMMUNITY ENGAGEMENT | | | |
| Deepen engagement in catchment areas such as Boynton Beach, Downtown West Palm Beach, and Wellington. | | | |
| Invest in/develop programs for key demographic groups including 55+ adults, families, business professionals, young adults, and teens. | | | |
| Clarify the Federation's Jewish Life and Engagement strategy, and ensuring CJE strategies meet community needs. | | | |
| Set parameters for Federation's direct programming, partnerships, and handoffs to community agencies. | | | |
| NETWORK | | | |
| Identify unmet needs and develop local agency capacities to address these needs effectively. | | | |
| Enhance understanding of purpose, scope, and role of Federation offerings for community institutions, synagogues, and partner agencies. | | | |
| Transition certain Federation-incubated programs to partner agencies. | | | |
| Strengthen communication with partners and local organizations regarding Federation's role and offerings. | | | |
| With key partners, move towards communicating the 'total investment' and not only allocation funding. | | | |
| Assess community infrastructure needs and identify where additional resources are needed across the network. | | | |
| Conduct a cross-agency engagement and programming gap analysis; explore additional resource needs | | | |
| Strengthen the capacity of agencies and partner organizations to oversee, execute, and own initiatives serving community needs. | | | |
| ANTISEMITISM AND COMMUNITY RELATIONS | | | |
| Implement the plan for the Palm Beach Center to Combat Antisemitism & Hatred to build allyship and enhance communal safety and security. | | | |
| Grow capacity to serve the community's safety needs through implementing physical security upgrades. | | | |
| Deepen partnerships with local organizations and increase public visibility at community-wide events to showcase Federation's commitment to civic engagement and its fight against all forms of hate. | | | |
| Offer additional missions to Israel for key leaders and influencers in the community to strengthen connections and deepen understanding. | | | |
| Increase the number of non-Jewish influential people publicly speaking up about antisemitism and partnering with the Jewish community. | | | |

STRATEGIC PLAN IMPLEMENTATION TRACKING TOOL

PLANNED YEAR COMPLETED YEAR VARIANCE

| ISRAEL AND GLOBAL JEWISH PEOPLEHOOD | | | |
|---|--|--|--|
| Prioritize assessment of longer-term needs due to the war in Israel. | | | |
| Offer meaningful opportunities for community members to support Israel through volunteerism, education, and philanthropy. | | | |
| Ensure internal alignment of all Israel-related portfolio areas, including Israel Education, Partnership2Gether, and the Stacey & Mark Levy Center for Israel & Overseas. | | | |
| Develop and implement educational programs emphasizing Israel's cultural, historical, and contemporary significance. | | | |
| Increase awareness and understanding of the current situation in Israel, dispel misconceptions, provide a nuanced understanding of Israel's complexities, and foster lasting connections to global Jewish peoplehood. | | | |
| TALENT | | | |
| Conduct a comprehensive review of the organizational structure and ensure competitiveness with market. | | | |
| Create a strategic recruitment plan to attract candidates with skills and experience needed for key roles, decrease number of unfilled positions, and streamline the hiring process to minimize time to fill roles. | | | |
| Develop a thorough onboarding curriculum and training program for new hires. | | | |
| Increase the number of support staff positions to keep up with the Federation's growth and provide essential support for operations. | | | |
| Expand staff development, mentorship, coaching, and training programs to help employees meet ambitious goals and increase retention. | | | |
| CONSTITUENT JOURNEY | | | |
| Invest in a new, advanced CRM system and develop a plan for implementation, including staff training. | | | |
| Define a vision for data systems usage across the organization and ensure alignment of all teams in leveraging data effectively. | | | |
| Conduct a comprehensive review of current constituencies in the database to ensure accuracy and completeness of data. | | | |
| Streamline data entry processes for all teams within the organization. | | | |
| Build a 'people-centered constituent journey plan' to create a more personalized experience for all constituents and identify key junctures/ communication touchpoints for different profiles. | | | |
| IMPACT | | | |
| Define clear metrics, aligned with desired goals, to evaluate impact for all investments, both through partners and Federation direct programs. | | | |
| Establish a comprehensive data management strategy for all programmatic investments that ensures accurate, real-time data collection to measure impact and assess program effectiveness. | | | |
| Strengthen cross-departmental planning internally. | | | |
| Explore establishing a Center for Research and Planning to serve as a hub for community research and data-driven community planning insights. | | | |



jewishpb.org/strategy



Jewish Federation[®]
OF PALM BEACH COUNTY

561.478.0700

jewishpb.org

@jewishpalmbeach