

# 2019-22 Strategic Plan.

JEWISH FEDERATION  
DURHAM-CHAPEL HILL

# a look **back**

Five years ago our strategic plan focused on **fortifying**. Through a dedicated task-force, we made decisions that repaired and strengthened things—rocky finances, fuzzy messaging, operational hiccups and stagnating fundraising. So now that’s done. We did it.



To see all we accomplished, view *Strategy for Good*: [shalomdch.org/download/Strategic-Plan.pdf](http://shalomdch.org/download/Strategic-Plan.pdf)

# a **deep** dive

This year we looked deeper—focusing on **finding out** what you think. Using surveys, SWOT analysis and a focus group retreat, we listened to you all. Young and old. Jews and non-Jews. Members and non-members. Your feedback helped identify four key areas to further investigate.

## TIME LINE

## DELIVERABLES

WINTER 2018

Form Strategic Planning Committee

WINTER-SPRING 2018

Gather community input and other data

SPRING 2018

Analyze data and establish focus areas

SUMMER 2018

Create goals and metrics and draft plan

FALL 2018

Approve plan and share with community

# a path forward

Now—with the benefit of operating in a comfort zone—we can take the time to analyze our expanding Jewish community needs, to assess our priorities and identify opportunities.

This plan is **about learning**. We've identified four areas to study in depth over the next 3 years. The plan outlines the deliverables and timing for each objective.

## four areas

### MESSAGE & BRAND

How to best message who we are and what we do?

### HELP & ENGAGE

How to serve more people and serve them better?

### STABILITY & GROWTH

How to stabilize our finances and fund growth?

### PEOPLE & PLACE

How to best care for our building and staff?

# one:

## message & brand

One key finding is that **our brand is confusing**. Who we are and what we do is often unclear. Although parts of the Federation are well understood—like the JCC and JFS—The Federation, as the operating arm, is not. Here is our plan to solve this:

### 1 INVESTIGATE

Examine branding models of comparable for-profit and non-profit organizations.

### 2 UPDATE

Verify that our mission and vision accurately reflect who we are and what we do.

### 3 EXECUTE

Update our brand—which may include overall look, messaging, name, logo and website.

#### TIME LINE

SPRING 2019

FALL 2019

FALL 2020

#### DELIVERABLES

1 Recommend brand model

2 Share revised mission/vision at Annual Meeting

3 Present rebranding at Annual Meeting

# two: help & engage

Helping people of all ages and walks of life has long been a core component of what we do. But our research **reveals gaps**. Though our programs for young families and seniors are vibrant, those for teens and young adults are not. These next objectives ensure more opportunities for all.

**4 FOR TEENS**  
Create new Midrasha curriculum and introduce new teen programs, both internally and through partnerships.

**5 FOR YOUNG ADULTS**  
Expand programming by strengthening partnerships with local organizations.

**6 DEVELOP LAY LEADERS**  
Establish a Jewish Community Leadership Development Initiative.

**7 OVERCOME BARRIERS**  
Determine what's needed to eliminate transportation and financial barriers to participation.

**8 FOR SENIORS**  
Explore opportunities and resources needed to improve senior day care, living facilities, memory programs and more.

## TIME LINE

WINTER 2019

FALL 2019

FALL 2020

FALL 2022

## DELIVERABLES

**4** Launch Midrasha curriculum and introduce six new teen programs

**5** Establish four new programs for young adults

**6** Community Leadership Initiative established

**4** Midrasha reaches 90 students enrolled

**7&8** Report plans at Annual Meeting

# three: stability & growth

Our goal here is to explore new ways to **generate income**, while finding other ways to **lower costs**. Some of our current income streams—camp and JCC membership—are already at capacity. To continue to grow, we need to expand programs and add new ones. Here are plans for a better bottom line:

## 9 ANALYZE PROFIT

Conduct a cost/benefit analysis of current profit centers and explore other expansion opportunities.

## 10 COVER DEBT

Establish long-term plans to ensure debt coverage.

## 11 YEAR-ROUND SWIMMING

Assess potential off-site partnerships to provide year-round aquatics.

## 12 EXPAND FACILITIES

Initiate plans and campaign to improve current facilities and develop donated adjacent land.

## 13 JOIN FORCES

Research potential campus and community partnerships to better serve our community.

### TIME LINE

SUMMER 2019

FALL 2020

FALL 2021

SPRING 2022

### DELIVERABLES

- |   |   |   |   |   |  |   |
|---|---|---|---|---|--|---|
| <p><b>9</b> Cost/benefit analysis and expansion plans</p> | <p><b>10</b> Establish plan to cover debt</p> | <p><b>13</b> Recommend shared benefit options</p> | <p><b>11</b> Present off-site aquatics plan</p> | <p><b>13</b> Present Early Childhood expansion findings</p> | <p><b>12</b> Launch expansion plans and campaign at Annual Meeting</p> | <p><b>13</b> Provide back office shared support options</p> |
|---|---|---|---|---|--|---|

# four: people & place

Without the right infrastructure—**the right facilities and the best people**—none of our goals are possible.

## 14 THE BEST PEOPLE

To maintain high-quality staff and maximize retention, implement a staffing model that ensures we have the proper resources to sustain current and expanded operations.

## 15 A 10-YEAR PLAN

Complete a 10-year maintenance plan for facilities, including all current deferred maintenance needs, with timeline and estimated costs

TIME LINE

SUMMER 2019

FALL 2020

DELIVERABLES

14

Present staffing resource plan to Board of Directors

15

Incorporate maintenance needs into FY 2021-22 budget

# from zero to zowie

Planning pays-off. What began as an idea by a few forward-thinking leaders, is now a vibrant community **bursting at its seams**.

## THE RENTING YEARS

All programs and services were held at various rental sites throughout the area.

No JCC members  
Limited programs  
10 staff, part-time ED  
\$500,000 budget

2007 PJC is formed

## A PERMANENT HOME

The PJC (Partnership for a Jewish Center) was formed to fund and build the Levin JCC.

600 JCC members  
1-2 programs/WEEK  
Staff of 100  
\$2M budget

2013-18 Strategic Plan

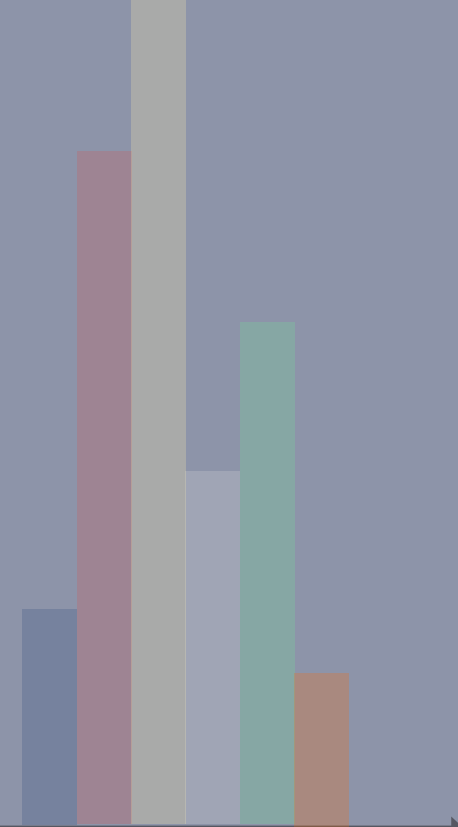
## A THRIVING HUB

Today, this bustling life force—home to the JCC, Camp Shelanu, JFS, Israel Center, Foundation and others—has reached capacity. We're ready for the next big thing...

1,100 JCC Members  
3-5 programs/DAY  
160 staff, 1st CEO  
\$3M budget

2019-22 Strategic Plan

where will we **grow** from here?







**2018 Strategic Planning Committee**

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