



Jewish Community Foundation

San Diego

STRATEGIES FOR 2011-2016 SUMMARY

A Message to the Community:

The Jewish Community Foundation recently updated our strategic plan to ensure that we continue to be highly responsible and effective in serving the community.

To formulate this plan, a Strategies Committee was established and worked over the last nine months with the full participation of the Board of Directors and staff. Throughout the process, the Strategies Committee sought input from the community through interviews with key leaders, donors, community organizations, and former board members of the Foundation.

We wish to express our gratitude to everyone who made this report possible. All of us at the Foundation are eager to put this plan into motion for the betterment of our community.

Emily Einhorn
Chair
Board of Directors

Marjory Kaplan
President and CEO
Miriam and Jerome Katzin
Presidential Chair

Jerry Turk
Chair
Strategies Committee

2010-2011 Strategies Committee

- ◆ Barbara Bry
- ◆ Mel Cohn
- ◆ Jim Farley
- ◆ Murray Galinson
- ◆ David Kabakoff

- ◆ Brian Miller
- ◆ Jane Scher
- ◆ Jeff Silberman
- ◆ Brian Tauber
- ◆ Jan Tuttleman

Staff:

- ◆ Gail Littman
- ◆ Jeremy Pearl
- ◆ Charlene Seidle
- ◆ Susan Knopman

OUR STRATEGIC THEME: TRUST

The donor surveys, community interviews and direct feedback we solicited to develop this plan revealed that the Foundation has earned a high level of trust and confidence, which we will never take for granted. We strive to serve the community with competence and integrity. This commitment applies to donors, prospective donors, community organizations, staff, board, committee members and anyone who crosses our path.

STRATEGY #1: EXPAND RELATIONSHIPS WITH CURRENT DONORS

Although we will still seek to introduce the Foundation to individuals and families who may not know us, the clear focus will be to deepen the valued and trusted relationships already existing with Foundation donors. To maintain this trust, the Foundation's role will be as a strategic philanthropic advisor. We will not fundraise except for special community-wide or emergency initiatives approved by the Board.

Key Actions

- ◆ Maintain timely, quality communications with all donors.
- ◆ Develop legacy plans with donor advised fund families.
- ◆ Ensure legacies entrusted to the Foundation are carefully managed to honor each donor's charitable intent.
- ◆ Encourage referrals from current fund families.
- ◆ Connect donor interests to giving opportunities in San Diego and Israel.
- ◆ Highlight community needs and philanthropic strategies.
- ◆ Provide excellent support and service to JCF family foundations and the Leichtag Family Foundation.
- ◆ Continue to work closely with and fully engage the Jewish Women's Foundation.
- ◆ Maintain close ties with professional advisors.

STRATEGY #2: ENCOURAGE PHILANTHROPY AMONG YOUNGER GENERATIONS

The Foundation must engage the younger generations to keep our traditions of philanthropy strong. The Foundation has a long history with teen programs and will significantly enhance those programs. In addition, we will engage those in their 20s and 30s in meaningful ways.

Key Actions

- ◆ Implement youth philanthropy programs for grade school through high school students, including the Peter Chortek Leadership Awards.
- ◆ Engage young people in their 20s and 30s through their families' donor advised funds and foundations and through collaborative work, especially with the Jewish Federation and other local young adult groups.
- ◆ Convene multi-generational conversations.

STRATEGY #3: EXPAND PARTNERSHIPS WITH JEWISH ORGANIZATIONS

Now entering its eighth year, the Endowment Leadership Institute (ELI) has successfully partnered with our local organizations to build planned gifts and endowments. Through ELI, custodial fund management and grantmaking, we interact in positive ways with Jewish organizations. This strategy seeks to strengthen these partnerships to advance philanthropy on all fronts while not fundraising for any individual organization.

Key Actions

- ◆ Ensure continued success of Endowment Leadership Institute, Governance Leadership Institute and Book of Life.
- ◆ Provide excellent resources for planned giving and endowments.
- ◆ Maintain productive, positive relationships with all Jewish institutions in San Diego.
- ◆ Collaborate with the Jewish Federation, particularly on issues that strengthen the Jewish community in San Diego, Israel and overseas.
- ◆ Assist in matching Foundation donors with giving and volunteer opportunities throughout the Jewish community.
- ◆ Evaluate Areivim program in which the Foundation brings ELI to other Jewish communities.

STRATEGY #4: SERVE AS A RESOURCE FOR PHILANTHROPY IN SAN DIEGO

As the largest grantmaker in San Diego County, it's important to take our place at the larger community table. Increasingly, the Foundation is cited as one of the strongest philanthropic leaders in the county. Although the Foundation fully realizes our focus on Jewish philanthropy, we understand that we must also use our voice in the general philanthropic community.

Key Actions

- ◆ Maintain positive relationships with San Diego Grantmakers, Association of Fundraising Professionals, Nonprofit Management Solutions, and secular private and public foundations.
- ◆ Partner with others to develop and disseminate research in areas of general community need and interest.
- ◆ Develop stronger ties to other local community foundations for our mutual benefit. Participate in the San Diego Foundation's Regional Visioning Initiative.

STRATEGY #5: BUILD INFRASTRUCTURE TO ENSURE TRUST FOR THE LONG-TERM

The Foundation must maintain a strong and viable organization. In countless discussions with families, we have been asked, "How can we know the Foundation will be strong and trustworthy in the decades to come?" To carry out our mission and strategies, we will continue to develop an enduring and flexible organization focused on service, results, integrity and competence.

Key Actions

- ◆ **Governance and Legal:** Maintain strong board and committees to ensure excellent governance with emphasis on financial security, transparency and accountability. Engage outstanding lay leadership with diverse talents and ages. Build strong lay-staff partnerships.
- ◆ **Staff and Management:** Enhance management reporting systems for fund and service tracking. Build and maintain outstanding, respected and highly productive staff. Create development and succession plans with focus on solidifying Foundation culture.
- ◆ **Finance and Investments:** Maintain stability and diversity of Foundation revenue. Ensure outstanding fund and financial management. Provide excellent management and oversight of investments. Maintain appropriate reserves.
- ◆ **Technology:** Build and strengthen technology to assist in achievement of goals.
- ◆ **Marketing and Communications:** Use high-quality, cutting-edge and effective communication tools to tell the Foundation story and advance our goals.

MEASUREMENT AND REVIEW

The Foundation has created key measurements for each strategy in order to evaluate our progress. These strategies are being implemented through the annual plans for the Foundation beginning July 2011 and monitored closely as the external and internal environments change.

MISSION STATEMENT

To promote philanthropy through meaningful partnerships with donors and community organizations in achieving charitable goals; to increase current and future support for a vibrant and secure Jewish and general community in San Diego, Israel and around the world.

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