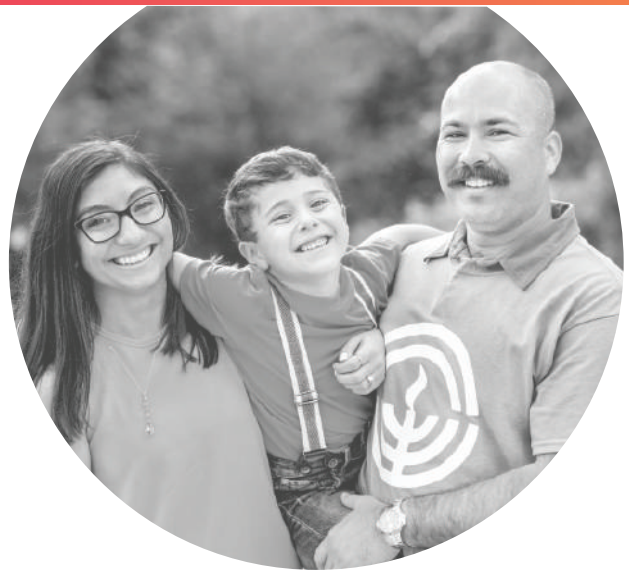


Jewish Silicon Valley
Strategic Plan





Introduction

The Addison-Penzak Jewish Community Center and the Jewish Federation of Silicon Valley completed a long-anticipated merger in February of 2021. “Jewish Silicon Valley” was chosen as the name for the united agency, with the understanding that this name not only represents the agency itself, but also refers to the entire Jewish community in the South Bay area. It expresses our commitment to serve the thousands of individuals of every background and belief who walk through our doors each week to participate in our own programs, as well as our intention to collaborate with and support the full spectrum of Jewish and other partner agencies across our community whose work is vital to meeting our mission.

Soon after the merger was completed, we embarked on a planning process to identify Jewish Silicon Valley’s key strategic priorities. We formed a Strategic Planning Task Force that drew upon input from our Board of Directors, our senior management team, and numerous community stakeholders who participated in a listening tour conducted in the fall of 2020. Four clear goals emerged from the process, and these will serve as the organization’s guideposts.

Taking into consideration the newness of Jewish Silicon Valley, and acknowledging the unpredictable circumstances that JSV will be navigating in a post-pandemic world, the Task Force decided to take a short-term approach to identifying specific details for implementation. Tactics and Key Performance Indicators for year one are included in the plan, and the Board and senior management team will regularly assess our activities throughout the first year to understand if these are helping us to successfully meet our objectives. A new set of Tactics and KPIs will be developed for year two in the fourth quarter of the first year.

Thank You

We are truly grateful to the Strategic Planning Task Force members: Joy Cohen, Marilyn Goldsmith, Helaine Green, Steve Green, Sheryl Lewis, and Jonathan Sweedler. Thank you to JSV Board members Sheldon Gilbert, Wayne Levenfeld, Virginia Hess, Evan Kass, Robert Chaykin, Judy Levin, Hayley Charnaw, Alexa Kaskowitz, Michal Shoham, Abigail Gavens, Robin Sabes, Rabbi Jaymee Alpert, Shana Penn, Julia Cinnamon, Kotarah Cooper, Jill Rosenberg, and Brett A. Borah along with all of the many other stakeholders who gave their time and shared their experiences and hopes with us. And a special thank you goes out to our senior management team for their deep insights throughout the process and for their enthusiasm to carry the vision forward.



JSV Mission

Jewish Silicon Valley harnesses the power of community to improve lives, build bridges of understanding, and strengthen the Jewish people here, in Israel, and around the world.

JSV Vision

To ensure a vibrant Jewish community in Silicon Valley and promote the well-being of all people by providing visionary leadership, philanthropic support, and meaningful programs and experiences that are rooted in Jewish values & traditions.

Guiding Principles

- Strive to meet people where they are at through active dialogue, innovation & adaptability
- Emphasize collaboration and partnership both internally and externally
- Invest resources in our staff and facilities
- Promote the health and well-being of all people
- Be transparent and consistent in communication
- Create just, equitable, and inclusive communal spaces



The following four strategic priorities will guide the work of Jewish Silicon Valley for 3-5 years, beginning in July of 2021. Each year, the JSV staff and Board of Directors will review a set of annual tactics and key performance indicators to assess our successes and adjust our activities in order to continue making progress towards achieving these goals.

Strategic Priority #1

Cultivate and support a collaborative local Jewish ecosystem that welcomes a wide spectrum of people to be part of a warm and welcoming community.

Strategic Priority #2

Create and support a leadership pipeline.

Strategic Priority #3

Invite people of diverse backgrounds, beliefs and abilities to participate in life-improving experiences that are rooted in Jewish values and traditions. Be a partner in supporting the needs of the broader local community.

Strategic Priority #4

Ensure the long-term fiscal health of Jewish Silicon Valley in order to meet our mission.

Activities to Meet Strategic Goals in FY21 July 2021-June 2022

• Strategic Priority One

Cultivate and support a collaborative local Jewish ecosystem that welcomes a wide spectrum of people to be part of a warm and welcoming community.

• Tactic #1

Be a leading partner to strengthen relationships and foster collaboration and “coopetition” among local Jewish organizations.

Key Performance Indicators

- a. Create and implement a year-long communication plan that establishes greater understanding about the role and mission of Jewish Silicon Valley in serving the community.
- b. Include clear and transparent systems for communicating fund development methods and allocations processes to community partner agencies.
- c. Bring together local Jewish leadership and communities of practice (lay leadership, executives and agency heads, clergy, family educators, etc), to develop a statement of common purpose and a shared set of goals to create a highly welcoming and inclusive community by the end of the calendar year.
- d. Facilitate, at least quarterly, collaboration across (>50% of local Jewish orgs) with the goal of identifying and implementing cross-organizational initiatives.

• Tactic #2

Assess Jewish community needs.

Key Performance Indicators

- e. Learn about the experiences and needs of affiliated Jews, unaffiliated Jews, and those interested in engaging with Jewish community in our region. Complete surveys and focus groups by the end of the fiscal year.

• Tactic #3

Implement a welcoming and collaborative agenda

Key Performance Indicators

- f. Offer and support meaningful, community-building Jewish experiences and programs for people at every life stage and all demographics. Implement a method to track attendance, repeat participation and participation in new activities.
- g. Welcome and encourage diversity. Develop and use inclusive language in all communications to welcome diverse participants.
- h. Work with the Board and staff through a process of education to develop and adopt an organizational Diversity, Equity and Inclusion plan and statement.



• **Strategic Priority Two**

Create and support a leadership pipeline.

• **Tactic #1**

Engage a wide cross-section of the community in volunteerism and lay-leadership positions

Key Performance Indicators

- a. Recruit program participants and supporters to serve on JSV program and other advisory committees (10% of JSV committee participants will be new volunteers).
- b. Provide staff and develop a system to connect JSV participants with volunteer and leadership opportunities at JSV and other organizations, based on their interests and organizational needs.
- c. The Governance Committee will identify two willing candidates for key leadership positions on the JSV Board for future succession planning. (Measure percentage)

• **Tactic #2**

Provide opportunities for staff and current and future lay leaders in personal and professional growth

Key Performance Indicators

- d. Create and begin to implement a plan with clear pathways for entry into leadership as well as growth (skills, confidence) for current and future lay leaders. Include funding for a program to support this effort in FY 22/23 as part of the budgeting process.
- e. Create a plan for professional growth for JSV staff. (Implement when?)
- f. Provide resources and education for staff to learn more about Jewish traditions and practices, based on their personal interest and/or as this relates to their job responsibilities

• Strategic Priority Three

Invite people of diverse backgrounds, beliefs and abilities to participate in life-improving experiences that are rooted in Jewish values and traditions. Be a partner in supporting the needs of the broader local community & the environment.

• Tactic #1

Foster inclusivity through intentional approaches.

Key Performance Indicators

- a. Create a task force to use the DEI statement to identify gaps in our outreach and inclusion efforts. Create 3-5 specific recommendations for improvement.
- b. Create inclusive and intentional invitations, messages and content to make it clear that all are welcome. Enlist 3-5 trusted representatives of diverse populations to provide monthly feedback on JSV communications and messaging to the marketing team.

• Tactic #2

Make Jewish traditions and concepts easily accessible to all who are interested in learning more.

Key Performance Indicators

- c. Partner with 1-3 organizations who serve those who have been historically left out to help us identify and remove barriers that impede access to Jewish life.
- d. Include Jewish concepts in staff onboarding orientations and quarterly trainings. Invite staff to participate in Jewish year-cycle experiences.
- e. Distribute monthly reflections to JSV staff and board from staff rabbis and Jewish educators.

• Tactic #3

Understand and respond to the needs of our local community.

Key Performance Indicators

- f. Assess and respond to the local community's emergent needs
 - Provide space on campus for community needs (during power outages, natural disasters, etc.)
 - Work with local agencies (such as food banks, Red Cross, interfaith institutions, etc.) to help
 - provide support through volunteer service and funding.

• Tactic #4

Establish and maintain ongoing relationships beyond the Jewish community.

Key Performance Indicators

- g. Continue to partner with a wide range of local organizations, including those that represent interfaith and marginalized communities, to amplify their work and seek to collaborate on shared programs that foster learning and relationships.
- h. Extend the work of JCRC as a key initiative in building alliances across communities to help diminish antisemitism; Report regularly to the JSV Board and interested donors on JCRC's achievements and provide opportunities for volunteerism, advocacy and funding to support JCRC's work.

• Tactic #5

Take steps to improve environmental sustainability in the general community and among JSV stakeholders

Key Performance Indicators

- i. Identify a consultant to help study options for steps JSV can take to address climate change by the first quarter.
- j. Create a plan and begin implementing in year one.

• **Strategic Priority Four**

Ensure the long-term fiscal health of Jewish Silicon Valley in order to meet our mission.

• **Tactic #1**

Develop a strong financial infrastructure

Key Performance Indicators

- a. Hire appropriate Finance Department staff to support operations.
- b. Evaluate, adjust and document protocols for Accounting/Finance, Investment & Audit procedures.
- c. Provide regular and accurate financial reports to the Board & JSV staff.

• **Tactic #2**

Maximize community resources

Key Performance Indicators

- d. Encourage and participate in sharing of resources across agencies, including physical space, technology and people.
- e. Implement two to three strategies to avoid duplication of programs across agencies.
 - Promote use of the shared calendar by Jewish partner agencies.
 - Collaborate with and promote existing programs at other institutions.
 - Work with local synagogues and programs to determine when collaborations are appropriate and successful in supporting the entire community.

• **Tactic #3**

Develop philanthropic revenue streams

Key Performance Indicators

- f. Focus on donor cultivation and donor stewardship. Grow a strong annual campaign and continue to develop a strong case for support.
- g. Offer giving opportunities to provide for emergent needs beyond the Jewish community.
- h. Involve the Board in helping to build relationships, increase Board giving and connect to corporate sponsors.

• **Tactic #4**

Strengthen operational revenue streams

Key Performance Indicators

- i. Work with Levy Family Campus to provide for and invest in the ongoing maintenance and upkeep of the facility to ensure great participant experience.

