

How the Jewish Federation  
of Greater Hartford Defined  
the Long-Term Changes  
& Impact They Needed to  
Re-Engage Their Local  
Jewish Community



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“What David created for us is not just a strategic plan that sits on a shelf and is taken out once a year. **It’s a living document that has been guiding us daily since its creation two years ago through the Federation’s most important priorities and strategies.**

**And with David’s additional guidance and expertise, we’ve also been able to launch major initiatives in all areas prioritized in our plan** — including with our marketing, brand, and community engagement.

Because of this, our fundraising has also grown significantly over the last year.”

DAVID WARREN

CEO, THE JEWISH FEDERATION OF GREATER HARTFORD

## THE CHALLENGE

# Identifying the long-term changes & impact needed for a flourishing Hartford Jewish community

Two years ago, the Jewish Federation of Greater Hartford found themselves facing many of the challenges shared by other Jewish institutions across the country—slowing community participation and support, misaligned lay-professional relationships, an impact that often went unrecognized...

As David Waren, the CEO of The Jewish Federation of Greater Hartford, put it:

“We were at a point where we needed a change. The campaign from the Federation had been stagnant for many years, and we were also hearing from many local Jews that they felt disconnected from the community institutions.

To ensure that our Jewish community remain strong and vibrant, we had a real need to identify and lift up key priorities and an awareness of our value proposition, engage our leadership, and drive our impact and revenue. ”

With this in mind, the Federation launched a strategic planning process to define the exact long-term changes and impact they needed to help their community flourish.

But when David Waren stepped into his new role as CEO 6 months later, he quickly realized that this process wasn't working. And that's when Panoramic Strategy stepped in.

“When I came on as CEO, I realized that this particular strategic planning process we were on wasn't going to be fruitful nor aligned with our goals and objectives. And despite everyone's best efforts, it didn't seem we could get it back on track.

And so when David Kaplan came to us highly recommended and agreed to come in partway through the process—despite how challenging joining at the midpoint is—we pulled him on.”

## THE SOLUTION

# Connecting data and decision-making to align all stakeholders on the way forward

Due to Panoramic Strategy coming in at a difficult time, their first step was to see how they could move forward while keeping everyone engaged, motivated, and confident in the future.



“Through the help of surveys and a few planning sessions, David Kaplan initially focused on finding what pieces of the former project process we had consensus on. From there, he then made sure we had the necessary buy-in and ability to leverage these pieces.

This was much appreciated from our end as it meant our task force members weren't put through unnecessary or repeated paces.”

From there, David followed a facilitation process that connected data (including internal data, financial and impact information, survey results, and more) to decision-making to get everyone aligned on the right way forward.

“ We were taken on an iterative process in terms of agendas, activities, and exercises which David Kaplan patiently and painstakingly went through with each key stakeholder.

Through his unique facilitation skills, he was able to make everyone in the room feel acknowledged and that their contributions were valued. And unlike other facilitators you may work with, with David there wasn't a single wasted breath or less-than-useful activity—**everything was very concise and allowed us to clearly and quickly get on the right path.**”

## THE RESULTS

# A living document of key priorities and strategies, the successful launch of multiple major initiatives & increased community fundraising

The end result of Panoramic Strategy's work with the Federation was a living document that guides all the Federation does today.

**"Ultimately, David was able to help us chart a course of action that allowed us to move forward—with utmost clarity and relevance—on the key priorities for the Federation, as well as the strategies, tactics, and resources necessary to achieve them.**

But what David created for us is **not** just a strategic plan that sits on a shelf and is taken out once a year. It's a living document that is guiding us even today—two years after its creation—daily. It's become the template for agreements around all the most important priorities and strategies across the Federation."

With David's coaching and support, the Federation has also been able to launch several key initiatives that are helping them make their plan become a reality.

"Since the creation of our plan, we've retained David to work with and empower our Chief Operating Officer who has been charged with implementing the plan with key staff.



Through his guidance, we've been able to launch major initiatives in all 3 areas prioritized in our plan. **We've taken very meaningful and specific steps to advance our marketing, brand, and community engagement... and because of this, our fundraising has already grown significantly over the last year."**

## THE NEXT STEPS

# The negotiation of a 12-community partnership in Israel & an upcoming planning process to identify areas of need and impact in the Hartford community

Since their first successful strategic planning process, David Warren has pulled Panoramic Strategy on for a number of other engagements to further strengthen the Jewish community.

One of their most impactful projects together has been a complex strategic planning process for the 12 Jewish communities in the Southern New England Consortium (SNEC), a partnership that pools resources together for greater philanthropic and social impact in an Israeli sister city.

“SNEC’s partnership had not been as well-run nor as impactful as we believed it could be, so we approached David yet again.

Through his help, we’ve been able to develop a strategic plan that, at its core, proposes a 6- to 7-figure project that could have a transformational impact in this region that we’ve partnered with.”

Panoramic Strategy’s most recent engagement with the Hartford Jewish community is an

ambitious project that partners the local Federation and the Foundation together to identify the areas of need and impact in their community.

**“Our current project involving both the Federation and the Foundation may just be our most important project yet. Despite this, we have full trust in David and his capacity to guide us to our goals.**

David is, after all, indefatigable. He comes from a Federation background and thus understands how a Federation works. He understands the issues faced by Jewish communities today. And he has a CFO background that complements his masterful facilitation skills to make change really happen.”