

JEWISH COMMUNITY STRATEGY & INTEGRATION

How JewishColumbus' Success Became the Nationwide Roadmap for Jewish Federations and Foundations

Seeking Unity, Strength & Impact Through Integration





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Nothing like what we were considering—an integration between the Federation and the Foundation—had been done before. So needless to say, we had quite the challenge ahead of us.

Despite the challenge, it's now been 3 years and 1 successful integration later... and **we find ourselves in a position of strength that's better equipped to handle community crises. Our donors and agencies are happier. And our annual campaigns have gone up by 30%.**

Without David's help, I'm confident that the process to get here would not have been as quick, efficient, smooth... nor as fun! He truly has all the skills that are needed to make a challenging process like this happen.

AUDREY TUCKERMAN

BOARD CHAIR, JEWISHCOLUMBUS

Moving past negative historical sentiments & getting everyone in alignment on the path forward

As Board Chair of the former Jewish Federation of Columbus, Audrey Tuckerman found that the way her local Jewish institutions—both her own Federation as well as the Foundation—had been operating wasn't working.

"The Columbus Federation and Foundation were stuck in an older, more traditional nonprofit model that often had them working against each other rather than in sync.

This meant our donors were unhappy about being asked to give twice. Our agencies were unhappy about the inefficiency of working with two organizations. And our local Jewish community reported feeling disconnected from our institutions at large (leaving us stuck with lower engagement as a result)."

It was clear to Audrey, as well as everyone else involved, that something needed to change. But the problem was getting everyone to agree on what that change should be.

“As we explored solutions, we had reason to believe that integrating our two organizations and working as a single team with

a single voice could help ease many of these problems... but our biggest challenge was getting everyone in alignment since this type of integration was something that really hadn't been done before.

This meant we not only had to convince everyone that integration was in our best interest, but also figure out how to contend with negative historical sentiments (i.e. Federation people not trusting Foundation people and vice versa)."

When both the Foundation and the Federation found themselves in the unique position of their CEOs stepping down, it seemed like the right time to act and make a real change.

And that's when Audrey brought David in.

A 4-step facilitation & decision-making process for change that got everyone to the “yes”

From here, David stepped in to lead the Foundation and the Federation through a 4-step facilitation and decision-making process.

Panoramic Strategy’s 4-Step Facilitation & Decision-Making Process for Change

STEP 1 Establish the right time for change and bring leadership together

STEP 2 Build trust among leaders of each organization to gather their input and arrive at the “yes”

STEP 3 Transition from if change will happen to how change will happen with an “integration roadmap” of action steps, barriers to overcome, budgets, and more

STEP 4 Put the right people and pieces into place to make execution on the change a reality

Although Columbus was one of the first Jewish communities in the country to take on a change like this, the process went far smoother than Audrey might have expected.

“Despite not having a model to base our integration on, our process went very smoothly and allowed us to get everyone in alignment to create real change. And I’m confident the process would not have been as quick, efficient, smooth, nor as fun without David in our corner.”

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For a full exploration of the process that David took JewishColumbus through...

You can request a copy of *The Case for Integration: JewishColumbus*—a full case study prepared by Panoramic Strategy—from The Jewish Federations of North America (JFNA) to see how other communities nationwide can embark on their own change processes.

The successful integration into JewishColumbus: a stronger, more unified entity to better serve the Jewish community

After nearly a year of hard work, Audrey, David, and everyone else involved had something to celebrate: the successful integration into the new entity now called JewishColumbus.

Today, Audrey can now say with confidence that this integration was the right choice for her community as it allowed them to hire the next generation of high-quality professionals, and see happier donors, agencies, and even a 30% increase in their annual campaign.

“We’re now 3 years into this unbelievable journey... and I can’t think of a single thing that’s not better now than it was 3 years ago. We still have some integration left to do, but for now our donors love only getting one call. Our agencies are happy. And we have a terrific, engaged Board.

Another effect that can be partially attributed to the integration is that we’re also raising a lot more money today as **we’ve gone up about 30% in our annual campaign** (which is pretty

significant given Covid and the world we’re living in today).”

Beyond this, Audrey has seen firsthand how acting as one unit has allowed JewishColumbus to move from a position of strength and impact real change in the face of tragedy.

“By acting as one unit, we’ve been able to respond more effectively to challenges in our community. When the terrible Pittsburgh synagogue attack happened in 2018, this meant we could quickly leverage our public officials and government funds to raise funds on behalf of our agencies and our synagogues.

And with Covid, this meant we succeeded in raising some 1.67 M beyond our annual campaign for relief in the form of our community response fund. **Between Pittsburgh and Covid, I don’t even want to think about what would have happened if these events had occurred 3 years ago when we were still two separate institutions.”**

THE NEXT STEPS

Continue to inspire the next generation of young leaders, raise more community support & strengthen their overall impact

After all that they've been through, Audrey is nothing but optimistic when looking at what comes next.

"We've already accomplished so much in our short little life... so when it comes to the future, the sky's the limit! But for now, our current goals are to continue inspiring the next generation of young leaders, raising funds to secure the Jewish community, and ensuring we're capable of responding to the next crisis when we need to.

We may have had to undergo a big change to get here, but all communities are undergoing a change of some sort. And ours more than paid off.

And if there's any other organization out there who wants to enact a change of their own or is looking to grow, evolve, transform... and are willing to dedicate the time and energy to do so? Then David is your guy."

