

JEWISH COMMUNITY STRATEGY & INTEGRATION

From Decision to
Implementation: How the
Greater Phoenix Jewish
Federation and Foundation
Were Able to Come Together
& Integrate for More
Community Impact



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When both the Jewish Federation and the Jewish Community Foundation of Greater Phoenix had spent years having less impact than we knew they were capable of, we began looking into solutions like integrating the two organizations.

The problem was that we couldn't seem to get lay leaders and professionals to come to a decision.

David was able to come in and not only help us come to a unanimous 'yes' decision to integrate, but also help us with all the behind-the-scenes strategy—including the organizational chart, the budgeting, the legal structure, and even advising our new CEO.”

JONATHAN HOFFER

CHAIR OF THE INTEGRATION TASK FORCE

THE CHALLENGE

Years of suboptimal impact & an inability to get everyone to come to a decision about the solution

Despite being one of the largest Jewish communities in the United States, the Greater Phoenix Jewish Foundation and the Jewish Community Foundation had struggled to tap into their true potential for years.

As Jonathan Hoffer, a former Board member for the Foundation and the Federation and community philanthropist, put it:

“For a long time, our campaigns had only generated about a 3rd of what we should have been doing for a community of our size.

We were also suffering from a lack of community outreach, which developed into a vicious cycle—we didn’t have enough money to make the impact in the community, but since we couldn’t make the impact we also couldn’t raise more money.”

As Jonathan began looking into solutions, he suspected that integrating the Foundation and the Federation into a single, stronger entity could be the answer.

“The way we were operating was very obviously not the best nor the most efficient thing for our community. It was clear that resources were spread thin at both organizations, yet I also saw that we had lay leaders and staff at both organizations that were essentially doing the

same thing when it came to accounting, staff, and allocations. **Because of this, I had reason to believe that our best option would be to integrate and create a new structure that could truly serve as the center for Jewish philanthropy in Phoenix.**”

However, all progress on this was quickly halted.

“But no matter what, I just couldn’t get lay leaders and professionals across the two organizations to come to an agreement and make a decision on this issue.”

As Jonathan began interviewing for external support that could help, he came across the **JewishColumbus integration case study** that David and Panoramic Strategy had created for The Jewish Federations of North America.

“David’s work in Columbus was very important to us since we were trying to use their integration as a model for our own. And when we interviewed David and visited with the staff and leadership in Columbus who had worked with him, we felt sure he was the right fit to help us.”

THE SOLUTION

Following the JewishColumbus roadmap to see if a Phoenix integration was possible & how

Using their Columbus integration as a roadmap, Panoramic Strategy began to move through a facilitation process that could help everyone determine if integration was the right option for the Phoenix institutions.

“When we first hired David, we weren't sure if the creation of this new structure was going to happen. And so we had David lead the process of meeting with the leadership of both organizations to evaluate if this integration made sense or not.”

The outcome from these meetings was a unanimous “yes” recommendation sent to both boards, who then unanimously approved the integration itself.

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



Since coming to this critical decision, the Phoenix Federation and Foundation have now moved into the implementation stage where David has acted as a key consultant on just about everything—providing input on critical decisions, heading negotiations with both parties and board chairs, and facilitating sessions that allow progress to be made in the creation of the new structure.

“As we’ve moved onto the implementation phase of our integration, there’s not much going on behind-the-scenes that David doesn’t have his hand on.

He’s helped with the organization chart and budgeting (his background as a CPA and CFO have been invaluable here). He’s been involved with the legal structure that we’re modeling off Columbus. He’s been involved a little with our new messaging. And he’s even stayed on to advise our new CEO.”

THE RESULTS

A unanimous “yes” decision to integrate and a strong transition to implementation

Although the Phoenix Jewish community is still relatively early in the implementation phase, Jonathan has high hopes for the future.

“There’s still work to do, but we’ve come a long way already. For one, David was able to help us get over our first major hurdle: simply getting everyone to come to a decision on the way forward.

Since then, we’ve already been able to create a new board... **and we feel confident that our future changes will allow us to touch more people to make more impact and ultimately raise more money for our community.**

Truly, David is a valuable resource for any organization within the business or nonprofit world—Jewish or otherwise. He’s got a good business mind, good people skills, and a CFO background that all tie together into his special ability to figure out the issues that a group needs to work through, and then lead them smoothly through the process.”

