

## **BRI's Vision, Mission, and Operations** **Insights from January 3 Seminar in Jerusalem**

### **Introduction**

1. **This document is a summary of the main insights raised by BRI leadership and stakeholders in a seminar which took place on January 3, 2011 at the BRI offices in Jerusalem.**
2. **The backdrop for this reassessment process are major trends affecting Birthright's playing field, as well as the recent decision by the Government of Israel to significantly increase its support for the program, thereby allowing the organization to grow exponentially in the coming years.**
3. **The Jerusalem meeting was the second part of a strategic seminar which began in NYC on November 2010. The goal of the NY seminar was to reevaluate Birthright's Vision, Mission, Strategy, and Unique Value Proposition for the year 2020.** The outcome was the compilation of a series of mission statements and values which could serve as guidelines for future decisions made by BRI's management team (see attached mission statements).
4. **As a follow-up to the NYC seminar, BRI stakeholders recently met again in Jerusalem to discuss some of the operational issues and challenges facing Birthright today. Specifically, the focus of the recent seminar was to map out the dilemmas related to the issues of participant eligibility and sustainability of the organization.**
5. **The Reut Institute has been invited by BRI's management team to help facilitate this re-visioning process. The following is a summary of the main issues raised in the meeting.**

### **Eligibility Criteria**

6. **Birthright's purpose and mission, as outlined in the NYC seminar is: "To secure a birthright gift for every eligible young adult to have a transformative Israel experience that strengthens their Jewish identity and connects them to the Jewish people and to Israel."**
7. **Participants were asked to zoom-in on the word 'eligible' and assess whether today's criteria are still relevant and whether they should be modified in light of the expected growth in funding.**
8. **Today's eligibility criteria are as follows:**
  - **Participants must have at least one Jewish parent (in Eastern Europe and the Former Soviet Union, at least one Jewish grandparent);**
  - **Age 18-26, living outside of Israel;**
  - **No previous (group and educational) trip to Israel.**

#### **Overtime, the following exceptions were made:**

- **Participants who have been to Israel but for a period of less than seven days;**

- Children of Israeli parents who left before the age of 12.

9. Below is a summary of the main points raised regarding each criteria:

### **Criteria #1: The Definition of Jewish**

10. **Recommendation: there should be no change in BRI's definition of who is Jewish**, but some room should be left for ambiguity and decided on a case-by-case basis.

### **Criteria #2: The Age Group**

11. **General questions and comments related to the issue of participants age:**

- **What is the kickoff?** At what point should BRI reevaluate the criteria? What is the tipping point which necessitates expanding the age cohort?
- **If it ain't broken, don't fix it** – BRI should not change anything about the age range unless there is a very good reason to so;
- **All age related decisions should be data-driven** – All future decisions should be based on available data and statistics;
- **From age groups to life-phases** – Instead of speaking about age groups, we should consider speaking about life-phases of participants. For example, college-years, after-college, young-professionals, etc. North American life phases are very different from life phases in the FSU.

### **Expanding the Birthright gift to the 13-17 age bracket**

- **Advantages include:**
  - **Raising chances of potential gap-year experience** – having a transformative Israel experience at the age of 17 (or younger) may positively influence a participant's decision to come back to Israel for a gap year before College;
  - **Reaching a wider cohort** – by engaging participants at a younger age, Birthright's reach will expand;
- **Disadvantages include:**
  - This age group is more difficult to manage;
  - May not be ripe for this experience;
  - May overlap with existing programs for junior and high-school students;
  - Reaching this age group would require a different marketing, education, and liability standards and strategy.

### **Expanding the Birthright gift to the 18-35 age bracket**

- **Age group should be further divided** into two groups that merit different treatment: 28-30 and 31-35;
- **Priority to waitlisted candidates should be given to candidates between the ages of 27-30;**
- **Recruitment process will have to be adjusted** – this age group is not as easily found on university campuses;

- **Content will have to be adjusted** – participants in this age group are less impressionable and usually more knowledgeable, and educational content will need to change accordingly;
- **Different composition of Israeli peers** – It is likely that Birthright participants aged 27-35 will more likely be interested in meeting young Israeli professionals rather than active-duty soldiers, for example;
- **Connection to MASA will need to be revisited** – MASA may need to expand to larger age-bracket.
- **Alternative suggestion: consider *narrowing* age bracket to only include 18-22 year olds** – College-aged participants are more easily recruited, they could be leveraged for combating BDS on campus and are more impressionable than older participants.

#### **General ideas related to this age group:**

- **Can leverage this age group for combating Boycott, Divestment and Sanctions efforts** – busses with College students should be exposed to content related to what they can do in order to fight de-legitimacy on their campuses;
- **Launch a program for life partners** – Birthright should consider initiating programs for young couples, with a special emphasis on couples with a non-Jewish spouse;
- **How can Birthright be more formal in creating a leadership cadre?** Birthright should work to identify future leaders and treat them differently – for example, a prospective participant may be eligible to go just because Birthright missed them last year or the year before;
- **BRI should focus on penetrating Eastern Europe, FSU, and Germany** for this age group;
- **Identify future leaders who are Jewish, not only Jewish leaders** – Birthright should target future 'movers and shakers' who may be doctors, policy makers or teachers from the general population who are Jewish and create a Birthright brand modeled after the Wexner program.

#### **Expanding the Birthright gift to the 40-60 age bracket**

- **Priority would be to reach people who would otherwise not come to Israel or have not been to Israel in a long time;**
- **Special attention should be given to parents of Birthright alumni** in order to create continuity and institutionalize the Birthright experience in Jewish households;
- **Offer Birthright-certified trips** for this age group that would be operated by others.

#### **Criteria #3: Previous-Trip to Israel**

- **Current criteria generally work well** – Birthright was able to raise funds, a waiting-list is in place and it manages to reach the kind of participants it wishes to engage with;
- **How should exceptions be judged?**

- Birthright is now losing participants from countries like the UK and Mexico, who usually go to Israel with their high-school;
- Geography may be a criterion for qualifying for an exception, and preference should potentially be given to participants from countries of interest, where a strong attack on Israel's legitimacy exists, or where inter-marriage rates are high, such as Germany or Eastern Europe.
- **Recommendation: map out all pre-Birthright programs** and create a rating system for them that would take criteria like the value of the experience and the level of education in mind – and use that system to judge the quality of a potential candidate's previous trip experience and therefore, his/her eligibility.

## Looking into the Future: Birthright's Sustainability

12. Below are the main ideas that were raised in order to increase the sustainability of the Birthright model. **The fundamental question at hand is as follows: How can Birthright shift the balance away from 'good-will giving' towards greater financial sustainability?**

- **In general, Birthright must rely less on good-will giving and instead focus more on efforts that would ensure its financial longevity;**
- **Launch a corporate philanthropy campaign** – for example, media ventures can be used in order to give participants materials that corporations invest in;
- **Create alumni groups with means for Birthright** so that it may, in turn, raise funds and increase Birthright's visibility (i.e., Mark Zuckerberg's sister);
- **Internationalization of resources** – Birthright's financial efforts should extend beyond North America;
- **Offer a matching grant program for younger donors;**
- **Hire a new bonds manager;**
- **Launch a baby-gift program** that would go towards the future Birthright trip of newborn babies;
- **Create mega-events within the communities** – For example, Madison Square Garden could be used to celebrate Yom HaAtzmaut;
- **Consider placing a time limit on opting-out of returning the trip deposit fee;**
- **On the question of endowments:**
  - What percentage of incoming funds should be put aside?
  - How can Birthright leverage participants' grandparents as a resource to increase endowment?
  - Best practice example: Metro-West and Chicago communities have started an endowment fund that is meant to send future participants on Birthright trips.

- **On the question of Birthright merchandise:**
  - Consider working with certain vendors only during the trip;
  - Consider selling Birthright merchandise, which would be connected to something valuable related to the values of Birthright.
- **Use models of e-philanthropy in an innovative way:**
  - Conduct focused campaigns on important dates on the Israeli calendar, such as Yom Haatzmaut or Tu Bishvat;
  - Find ways to incorporate e-philanthropy as a Jewish value into Birthright.

### Questions and ideas for future discussion

- **Birthright as an institution** - Beyond the trip experience, should Birthright expand and in effect become the main international gateway for Jewish experiences?
- **What should the relationship between Birthright and the Federations look like?** Today, Jewish Federations designate only 1% of their budget, on average, to Birthright and no longer constitute a major source of funding;
- **What does 'partnership' mean for Birthright?** In other words, it is time for Birthright to rethink its partnership model and structure?
- **How can the Birthright magic be leveraged to strengthen Jewish communities?**