

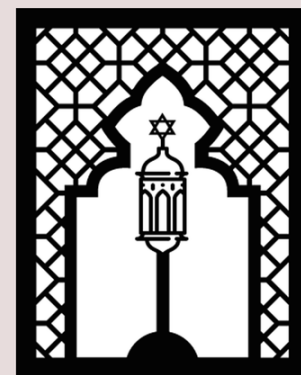


# SEPHARDIC JEWISH BROTHERHOOD OF AMERICA

## NATIONAL STRATEGIC PLAN

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ADOPTED UNANIMOUSLY BY THE  
NATIONAL CENTRAL COUNCIL



The Sephardic Jewish  
Brotherhood of America  
*La Ermandad Sefaradi*

**SPRING 2023**



# OUTLINE

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# ORGANIZATION LEADERSHIP

## Strategic Planning Committee

- Sedat Behar, Chair
- Larry Bensignor, Co-Chair
- Asaf Behar
- Larissa Cohen
- Aaron Levy
- Jay Matalon
- Rabbi Devin Maimon Villareal
- Jacob Shabay

## Executive Committee

- Sedat Behar, President
- Jeffrey Beja, First Vice President
- Marvin Marcus, Second Vice President
- Jay Matalon, Treasurer
- Andrew Marcus, Secretary
- Daniel Small, Financial Secretary
- Renee Motola, Assist. Treasurer
- David Schribman, Assist. Fin. Secretary

Ethan Marcus  
Managing Director

# EXECUTIVE SUMMARY

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The Sephardic Jewish Brotherhood of America is an organization that connects, supports and educates individuals, families, and congregations of Jews who trace their ancestral roots to Ottoman, Ladino-speaking Sephardic Jewry, to facilitate their vibrancy. We aim to have a membership that is growing and diverse; an organization that provides educational programming and an information exchange; a fraternal society that provides mutual aid; while being an organization that is financially sound and effectively and efficiently governed.

Over the past five years, the Sephardic Brotherhood has gone through an extraordinary transformation, seeing an explosion in new membership, educational and religious programming, social activity, and new public advocacy work for the Sephardic community. We have begun to cultivate a new generation of young Sepharadim who are passionate about their identities and are hungry for opportunities to get involved in Sephardic Jewish life in North America. Because of these strides, we have recognized the need to develop a long term roadmap for success, ensuring that the organization is prepared to grow and meet the challenges and needs of a modern, 21st century American Sephardic community.



# EXECUTIVE SUMMARY

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A Strategic Planning and Governance Committee was formed in 2022 with a mandate to recommend the organization's five year Strategic Plan. It is chaired by Sedat Behar, a member of the Executive Committee, and contains eight Brotherhood members from demographically and geographically diverse backgrounds, representing various community constituencies, meeting over half a dozen times over a six month period. After crafting the Brotherhood's mission and vision, it identified six goals to be achieved over the next year and beyond. The Committee underwent an analysis of the organization's strengths, weaknesses, opportunities and threats, and then revisited the goals for appropriate adjustments in light of the analysis. The Committee then identified over 50 objectives to achieve the stated goals. The resulting plan was approved by the Committee, then the Executive Committee and ultimately adopted by the Central Council unanimously. The Committee will now work with the Managing Director, staff, and various standing committees, to devise, fund and oversee tactics to achieve the objectives laid out in this Strategic Plan, as well as conduct periodic reviews to ensure plan efficacy. This represents an exciting leap forward for our organization, and we firmly believe that this Strategic Plan will help our Sephardic Community to thrive for generations to come.

Sedat Behar  
Chair

Larry Bensignor  
Co-Chair

# MISSION & VISION



**Our Mission:** We are an organization of Jews who trace their ancestral roots to Ottoman, Ladino-speaking Sephardic Jewry, for our mutual benefit.

**Our Vision:** To connect, support, and educate individuals, families and congregations of Sephardic Jews in the United States, to inspire and empower its members and to strengthen all Sephardic identities and communities throughout the country, to facilitate their vibrancy.



# OUR HISTORY

- Founded in 1916 as the Salonican Jewish Brotherhood, originally in the NYC area to serve new Sephardic immigrants to the Lower East Side
- Merged with other Sephardic communal groups from Rhodes, Izmir, Istanbul, etc to form the Sephardic Brotherhood of America
- In 1910s & 20s, assisted new immigrants with night classes in English, legal assistance, job placement, housing, Jewish life, and burial services
- Was one of the founding institutions of the UJA-Federation of New York (then Federation of Jewish Philanthropic Societies)



# OUR HISTORY

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- 1930s & 1940s – Formed a Fundo Secreto (Secret Fund – now the Henry J. Perahia Funds for the Needy) to help poor people during the Depression who were out of work
- Formed multiple chapters, built several Sephardic synagogues, Talmudai Torah and social centers in the NYC area (Lower East Side, the Bronx, Harlem, Brooklyn, New Brunswick)
- Created a Scholarship fund to help Sephardic community members obtain higher levels of education
- Helped with War Refugee Relief during World War II and reunited displaced Sephardic Jews from Greece with Family in US





# OUR HISTORY

- **1950s - 1960s:** Consolidated with Centro Judio Sefaradi and Sephardi Alliance to form Sephardic Jewish Brotherhood of America
- Formed South Florida chapter and synagogue based in the greater Miami area
- Established a Sephardic Youth League and new center in the Bronx
- Aided in the construction of Sephardic Home for the Aged in Brooklyn (Now Defunct)
- Became relatively inactive beginning in the 1990s through early 2010s, with primary focus on burial





# WHERE WE'RE GOING

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In the last 5 years, we have rethought how we have operated and served the Sephardic community from the 1980s–2010s:

- Revamping the organization, modernize it, and reconnect with Sephardic synagogues and communities nationally/internationally
- Recruiting new members from across the United States
- Engaging more actively in Sephardic education, programming, youth and young adult cultivation, and community building
- We are planning for a strong, vibrant, and flourishing American Sephardic community in a comprehensive, innovative, & strategic way





# SIX STRATEGIC GOALS

## GOAL 1

**Membership  
Growth & Diversity**



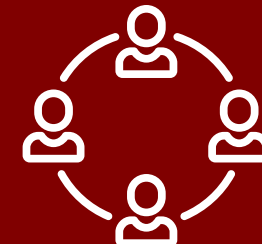
## GOAL 2

**Sephardic Education  
& Programming**



## GOAL 3

**Information  
Exchange & Support**



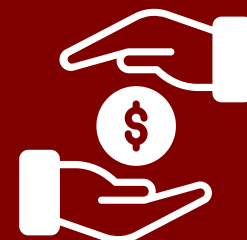
## GOAL 4

**Mutual & Fraternal  
Aid**



## GOAL 5

**Financially Sound**



## GOAL 6

**Effective & Efficient  
Governance**







# GOAL 1

An organization whose membership is growing and is diverse including in geographic presence, religious observance, and age.

## Priority A Objectives

- Analyze existing demographic information of members (COMPLETE)
- Rollout Online Membership Portal (COMPLETE)
- Survey members on demographics and desired benefits and services

## Priority B Objectives

- Create an effective positioning strategy
- Consider developing target penetration levels of different demographics
- Establish membership drive, through congregations and directly
- Develop programming and representation in major Sephardic communities outside of NY/NJ/South Florida.
- Hire part time/consultancy for Social media engagement

## Priority C Objectives

- Develop Corporate Branding (rebranding campaign)
- Develop youth program (college, high school) to provide farm system for future Brotherhood leadership





# GOAL 2

A leader in providing top notch Sephardic-related educational programming including but not limited to traditions, culture and food; language; religion; and history, to its members and the Sephardic, Jewish, and other communities at large, through both in-person events and digital and other media.

## Priority A Objectives

- Continue to develop robust “faculty”
- Analyze facilities needs (COMPLETE)
- Have professional management reflect need for programming assistance
- Create an intake system for prospective volunteers (include potential survey questions on this one).

## Priority B Objectives

- Offer in-person presentations at various congregations
- Create programming that is responsive to members’ desires, per survey
- Explore revenue raising opportunities from programming consistent with tax exempt status
- Develop programming strategy and calendar





# GOAL 3

A vehicle for information exchange and support among Sephardic individuals, congregations and communities, domestic and international, including matters of traditions, culture and food; language; religion; history; and social interaction.

## Priority A Objectives

- Engage/reach out directly to scholarship winners as ambassadors on College campuses and reinforce their own ties to the Sephardic community

## Priority B/C Objectives

- Increase domestic and international interaction and networking with peer Sephardic communities, both in person and virtual
- Establish a Council of Presidents of Sephardic Congregations
- Increase connectivity to both congregations and individuals who do not belong to congregations
- Establish a Sephardic Rabbinate and rabbinical network
- Form new Brotherhood Chapters around the country

## Priority C Objectives

- Form a Sephardic Beth Din (Rabbinical Court) of Community Rabbis





# GOAL 4

A “fraternal organization”/mutual aid society that provides death/burial benefits, financial and other assistance and scholarships to its members and others in accordance with its constitution and bylaws, in various geographical locations.

## Priority A Objectives

- Consider multiple classes of membership for individuals, with different levels of benefits (COMPLETE)
- Revitalize Henry J. Perahia Funds for the Needy, including providing direct welfare services, distributions, solicitations of applications, and structure

## Priority B Objectives

- Consider membership class for congregations
- Utilize social media to recruit new members and to communicate with membership base
- Offer opportunities to commemorate life cycle events of members and non-members (such as a Sephardic Bar Misva Program, Brit Milah, etc)
- Explore plot opportunities where critical mass exists without assuming undue financial risk
- Explore opportunities to establish burial program relationships with affiliate congregations





# GOAL 5

Financially sound, well managed, with a continuing stream of annual dues that are supplemented by grants and robust programs of annual giving, planned giving and endowments.

## Priority A Objectives

- Adopt a formal Investment Policy Statement, and periodic compliance review (COMPLETE)
- Implement a new Annual budgeting protocol: Staff recommends to the Central Council based on stated Central Council priorities. Central Council then approves or modifies, working with Staff, including levels of staff discretionary authority
- Consider funding needs and sources for each initiative
- Develop campaigns for gifts and planned giving
- Establish a process to determine the ongoing timing and extent of increased benefits (e.g. burial benefits) and revenues (initiation fees, and annual dues)

## Priority B Objectives

- Develop a grant application process, and pursue grants
- Develop a digital and integrated donation process
- Develop programs to promote successful giving and utilize scholarship recipients as ambassador to future donors

## Priority C Objectives

- Outline and Develop a Diversity of Giving Options for Potential Donors and Institutions



# GOAL 6

Effectively and efficiently governed, with oversight provided by a streamlined Central Council representing various Brotherhood constituencies, management provided by a professional staff, and all efforts being supported by a coterie of volunteers.

## Priority A Objectives

- Allocate responsibilities among Central Council, Executive Committee, and Staff: Central Council and Executive Committee provides various levels of oversight and review, Staff implements and conducts the activities; over time, more authority to be delegated to staff
- Identify and define objective measurements for various project accountability

## Priority B Objectives

- Recruit volunteers to assist in various programs and initiatives and develop a mechanism to attract and intake them
- Create a Set of Written Standard Operating Procedures for major elements of operations (e.g. budgeting and accounting, funerals and burials, scholarships, programming, grant writing, etc)
- Increase number and expertise of professional Staff (employees and/or consultants) to handle implementation of various board priorities commensurate with budgetary planning
- Consider size of Central Council to facilitate its effective oversight
- Implement Annual Board Training

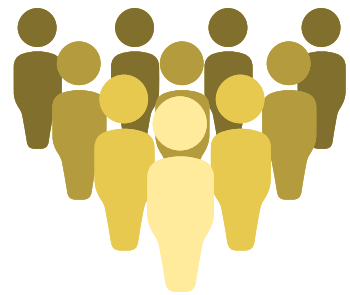
## Priority C Objectives

- Develop succession planning for primary areas of responsibilities





# KEY NUMBERS & FACTS



**1,500 Member Families**  
throughout the United States  
& Canada



**Approximately \$50,000 a year**  
in academic scholarships



**15 Community Hubs Around the**  
Country (Largest in NYC Metro,  
South Florida, & Seattle)



**Over 108 Years of Service to the**  
Sephardic Community in North  
America

# CORE MEMBERSHIP BENEFITS

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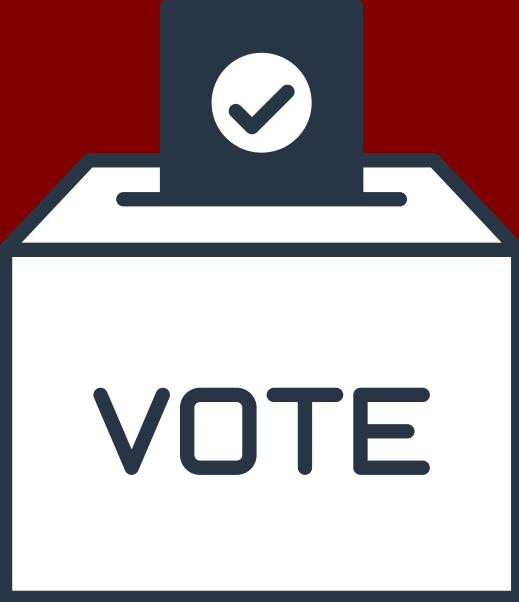
**BURIAL &  
LIFECYCLE**



**SCHOLARSHIP  
& EDUCATION**



**HENRY J. PERAHIA FUNDS  
FOR THE NEEDY**



**ELECT &  
HOLD OFFICE**



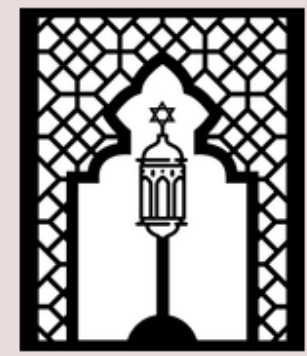


## NEW SOCIAL & EDUCATIONAL PROGRAMS

- Sephardic Digital Academy
- Sephardic Birthright Trip
- Tours of Jewish Turkey & Greece
- Zemirot.org - National Liturgy Database
- National Sephardic Community Gala
- Sephardic Citizenship Program
- National Rabbinical Network
- Youth & Young Families Engagement







The Sephardic Jewish  
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