BRI Advisory Committee
Summary of Nov 1st meeting in NYC

Introduction

1. This document is a summary of the main insights raised by BRI leadership and stakeholders in a seminar, which took place on November 1st, 2011 at the BRI headquarters in NYC.

2. This meeting was the third part of a series of strategic seminars, which began in NYC in November 2010, and continued in Jerusalem on January 3rd 2011. The goal of these meetings is to think about BRI in the year 2020, as part of a revisioning process designed to ensure the organization’s relevancy in a rapidly changing Jewish world.

3. The seminar focused on two issues: financial sustainability and trip follow-up.

4. The Reut Institute was invited by BRI’s management team to help facilitate this process. The following is a summary of the main recommendations that were put forth in this meeting.

Financial Sustainability

5. BRI’s mission is to bring every young Jewish adult to Israel and provide him or her with a transformative experience.

6. Currently, the 18-26 year old cohort is estimated at 70K people worldwide, at an estimated cost of 150M $/year.

7. Taking the existing revenue sources with reasonable increases into account, BRI should be able to reach the goal of 150M $/year by 2020, according to the following breakdown:

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount today ($M/year)</th>
<th>Amount (expected) ($M/year)</th>
</tr>
</thead>
<tbody>
<tr>
<td>JAFI</td>
<td>6</td>
<td>10</td>
</tr>
<tr>
<td>Philanthropists</td>
<td>43</td>
<td>50</td>
</tr>
<tr>
<td>Federations</td>
<td>15</td>
<td>20</td>
</tr>
<tr>
<td>GOI</td>
<td>Varies – 24 at 2011; 30 at 2012; 42 at 2013.</td>
<td>50</td>
</tr>
<tr>
<td>International donors</td>
<td>3-4</td>
<td>10</td>
</tr>
<tr>
<td><strong>Total sum</strong></td>
<td><strong>~95 $M/year</strong></td>
<td><strong>~140 $M/year</strong></td>
</tr>
</tbody>
</table>
8. **However, this model is volatile, as it relies on too few funding sources** - Accordingly, BRI needs to diversify its revenue sources in order to ensure its resilience over time. **Seven categories of new revenue sources were identified:**

- **Earned Income** (corporate sponsorship, advertising and merchandise);
- **Crowd-sourcing and grassroots initiatives** (non-designated, long-tail gifts, smaller gifts). For example, tribute cards and personal fundraising, special fundraising events etc;
- **Trip - deposit money**;
- **Other partner organizations**;
- **New partnerships with synagogues**;
- **Individually designated gifts**, for example Bar/Bat Mitzvah gifts, Brit Milah gifts and gifts from grandparents;
- **Shifting Israel Bonds to BRI Bonds**.

9. **The goal is that one third ($50M per year) of total income comes from these abovementioned revenue sources.**

10. **Next Steps: Establishing individual taskforces to assess each of the new revenue sources and address open issues.**

**Follow-Up**

11. **The wholesale nature of the BRI experience creates ambiguity surrounding BRI’s role in trip follow-up.** The following diagram represents a potential model aimed at creating a clear and streamlined follow-up process:

   ![Diagram]

   **IL - based follow up: C3 → Program**

   **BRI Experience → Hand off ↔ Local follow up: Database/Reunion**

12. **The C3 stage of the process refers to BRI’s role as a ‘Catalyst’, ‘Connector’ and ‘Concierge’:**

- A mapping of all available programs is required in order for BRI to act as a **catalyst** toward filling existing vacuums.
- BRI will serve to **connect** alumni will existing channels for a continued relationship with Israel.

---

1 The C3 element of the model refers to BRI’s role as a ‘catalyst’, ‘connector’ and a ‘concierge’. Accordingly, a mapping of all available programs is required in order for BRI to act as a **catalyst** for filling existing vacuums. BRI will also serve to **connect** alumni will existing channels for a continued relationship with Israel. Lastly, BRI will act as a **concierge** portal for directing alumni to the relevant available Israel experience programs.
BRI will act as a concierge portal for directing alumni to the relevant available Israel programs.

13. Importantly, trip follow-up has two dimensions, including activities both within local communities and those based in Israel.

14. A coherent approach to BRI’s role in follow-up (as illustrated above) needs to be developed. This approach must outline a shared understanding of the parameters of BRI’s involvement in follow-up programs.

15. These follow-up efforts must address the expectations of both the participants and donors.

16. Increasing a BRI alumni’s connection to the Jewish people through a reinforced connection with Israel is a central element of BRI follow-up. Five models for Israel-based follow-up were identified, each requiring a tailored BRI approach:

- **Israel reunions** - a wholesale model through which BRI alumni can return to Israel on a 5-7 year cycle, representing relevant lifecycle phases. The integrity of the BRI brand stands at the center of this model. In addition, the Israel reunion model is consistent with the BRI experience and realizes BRI’s UVP insofar as it offers a wholesale short term Israel experience.

- **Extension programs** - provides immediate Israel based follow-up on a paid basis.

- **Long-term immersion programs** - includes programs such as MASA and other long-term organized Israel experiences.

- **Short-term immersion programs** - includes programs run by other local organizations including synagogues etc, which provide short-term organized Israel experiences.

- **Short term private programs** - are a structure through which alumni can return to Israel on an independent and private basis, alone or with family

17. Next Steps: To establish three taskforces:

- **Taskforce #1** – Dedicated to the issue of ‘hand-off’ and C3.

- **Taskforce #2** – Addresses the reunion model which needs to be consistent with the BRI brand (10 day program, standardized and regulated)

- **Taskforce #3** – Addresses the issue of the database (to whom do the alumni ‘belong’?). That is, who has rights to the database? How can the participant elect specific follow-up engagement via entrance to the database?