

Strategic Plan 2017-2022
for Judea Reform Congregation



August 2017

August 15, 2017

Dear Board of Trustees:

On behalf of the Strategic Planning Committee, we are happy to enclose the 2017 – 2022 Strategic Plan for Judea Reform Congregation for your review.

For the past eight months, our committee has thoughtfully and thoroughly considered the most important issues that face our community over the next five years. All of us on the committee recognized that our task represented an opportunity to influence Judea Reform Congregation’s development as a spiritual community and as an organization.

The 2017-2022 Strategic Plan reflects extensive input from our congregants, gathered through committee engagement, data collected during our rabbinic and education director searches, and a face-to-face forum. It is ambitious and addresses both the needs and opportunities for JRC. We believe it is both realistic and achievable. This represents our assessment of where JRC needs to devote time, energy, and resources in order to continue to serve the needs of our congregants and the larger community.

We hope this plan will be a living document, a source of guidance and support to the leadership, both lay and staff, of Judea Reform Congregation. We anticipate this plan being the basis for annual plans for the board and staff. We expect the board to review progress to goals quarterly through annually, depending on the strategies.

We want to thank and recognize the members of our task force who dedicated a great deal of time and to help create this roadmap for Judea Reform Congregation. It was a terrific group of caring, committed members of JRC:

Heidi Aycock
Rabbi Larry Bach
Jason Block
Ed Bossen
Hayden Bosworth

Chip Carnathan, Co-Chair
Ziva Raney, Co-Chair
Jennifer Rudinger
Steve Simon
Megan Valentine

We also want to recognize the valuable input provided by our membership, religious school teachers, committees, and members of the board of trustees

Sincerely,

Chip Carnathan & Ziva Raney
Strategic Planning Task Force Co-Chairs

MISSION

Judea Reform Congregation is a vibrant, welcoming community where Jews in the Durham and Chapel Hill area gather to worship, learn, serve, and actively engage in the sacred traditions of our shared heritage.

We are inspired by Jewish history, the wisdom of our sacred texts, and the tenets of Reform Judaism. We use these in order to nurture our souls and our connection to God, to educate our children as well as ourselves, to cultivate leadership among all congregants, to celebrate our joys, to comfort those among us who are suffering, to serve our community and the world at large, and to promote peace and understanding. We preserve the great traditions of Judaism, respond to the current concerns of our community, and plan for a future of sacred engagement for generations to come.

We are guided by these six pillars of our faith:

Torah (“Teaching”): We nurture meaningful connection to God and to the core ethics and values of Judaism, illuminating modern times through the study of Torah and our sacred texts.

Limud (“Study”): We encourage continual Jewish learning and intellectual growth for people of all ages, from our young children to our senior members.

Avodah (“Worship”): We worship together as a community with spirit, joy, and song, encouraging members to fully participate in the cherished rituals and practices of our faith.

Kehillah (“Community”): We join together as a diverse congregation, bound by a common desire to belong to and support our Jewish community in times of joy and sorrow, need and plenty.

Tikkun Olam (“World healing”): We share a commitment to advance the welfare of the members of our congregation and our local community, the People of Israel and of the world.

Kedushah (“Sanctity”): We sanctify life’s sacred moments, from birth to death, through tradition and ceremonies that unite the hearts of loving companions, celebrate the bond between parents and children, and welcome people into the covenant of our faith, honoring our heritage while reflecting with sensitivity and creativity the insights of our time.

VISION

Our vision is to be the spiritual center of Reform Jewish life in the Durham and Chapel Hill area. We are a *sacred community* where relationships with God and with each other define everything the synagogue does; where *ritual* and *learning* are engaging; where Torah guides our thoughts and acts; where *social justice* is a moral imperative; and where *membership* is about welcoming and engaging both the committed and the unaffiliated. We are dedicated to *sustaining Judea Reform Congregation* from generation to generation to nourish meaningful Jewish life in our community.

Strategic Priorities	Strategic Initiatives	Recommended Activities	Owner(s)	Timeline
A. Community Engagement	1. Enhance ritual and spiritual experiences and opportunities to strengthen connections for current and potential members	a. Identify and enact service times and schedules, including HHD, that will serve all congregants and, in particular, families with young children	RPC	FY18
		b. Create opportunities for the congregation to learn music repertoire consistent with Reform Movement canon	Music Director	FY19
		c. Build a culture of participation in festival services beyond Shabbat and HHDs	RPC, Rabbi	FY19
		d. Further encourage a culture of inclusive congregational engagement in Shabbat morning worship	RPC, Rabbi	ongoing
		e. Consider other opportunities for members to engage in Torah, Limud and Kedushah; e.g. additional Torah study and Anshei Mitzvah Class.	RPC, Rabbi	FY18
	2. Ensure an engaged and diverse membership	a. Articulate a strategy toward membership engagement built on/in response to current membership & community trends, demographics and opportunities.	Membership, ExD, Youth	Start of FY19
		b. Make recommendations on definitions / privileges of membership	Governance	May 1, 2018
		c. Draft recommendations for consideration/collaboration with respect to affinity groups	Small Groups TF	FY18
		d. Form a task force to make recommendations on our membership support model that addresses engagement & financial needs of JRC*	Membership, ExD, Finance	FY19

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		e. Create & reinforce pathways to ensure all congregants and visitors can access, be supported and participate in synagogue religious, educational and social events	Inclusion	Ongoing
		f. Continue to address needs of our interfaith families, congregants with special needs (and their families), older adults, single adults, as well as other members who may feel marginalized	Inclusion, Membership	Ongoing
		g. Provide meaningful support and resources to congregants at times of need and/or joy.	Caring Community	Ongoing
		h. Nurture ongoing relationships with congregants with visits and programs (i.e., outreach to CCRCs)	Rabbi	Ongoing
	3. Build comprehensive and cohesive education program	a. Develop and implement a vision and strategic plan for Religious School that includes ongoing youth engagement (Pre-K-10), including following BM*	Religious School, EdD, Youth	Start of FY19
		b. Develop opportunities for leadership development (including LEAD), committee membership and succession planning	Governance	FY19
		c. Prepare long-term strategy for adult education leading to annual curricula that will include diverse topics and learning modalities	Adult Education	FY19
		d. Plan opportunities for intergenerational learning	Adult Ed, RSC	Ongoing

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	4. Strengthen our commitment to addressing issues of social justice consistent with values of Reform Judaism	a. Foster culture of committee collaboration and broad community engagement (including campus partners, and area Jewish and other faith organizations)	VP, Social Action, Youth, Rabbi, ExD	ongoing
		b. Develop process for enabling nimble and coordinated responses to modern day issues and current events consistent with our policies	Exec Committee, Rabbi, ExD	FY18
		c. Develop a comprehensive program to create opportunities for establishing personal connections with Israel consistent with Israel Discourse Policy*: education programming, trips, sister congregation	President to Assign	FY18
		d. Maintain and grow our active commitment to social justice fulfilling our BRIT OLAM pledge	Rabbi, Social Action, Youth	ongoing
B. Financial Health & Communication:	1. Diversify funding streams making non-membership support 45% of annual income by FY2022.	a. Identify and pursue opportunities to build a culture of philanthropy	Development	FY17 +
		b. Continue to grow our endowment funds with continued focus on planned giving-(i.e., Grinspoon) (18% of membership has committed legacy gifts by FY22)	Development, ExD	FY2022
		c. Increase revenue from facility rental and other synagogue physical resources	ExD	FY2019

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	2. Provide an annual and long-range model for funding capital repairs that meets our projected needs per 2014 Capital Reserve Study	Develop and implement funding that balances capital income with projected capital expenses.	Treasurer, ExD, B&G	FY 2019
	3. Maintain financial integrity and accountability in our processes and records	a. Commission full external audit of financials	ExD, Treasurer	FY2020
		b. Stay on track to achieve payback plan	Treasurer, ExD	FY2020
	4. Establish long term financial plan to maintain financial stability as our congregation evolves	a. Manage budget expansion to keep pace with revenue	Treasurer, ExD	Annual Goals
		b. Maintain focus on operational efficiency	Treasurer, ExD	Annual Goals
	5. Provide good stewardship practices by demonstrating financial integrity & transparency	a. Reference strategic communication plan (see below: Infrastructure #3) to assure transparency and access to financial information.	Development, Treasurer, ExD	January 1, 2018
		b. Coordinate messages to the congregation to minimize burden of “asks” with messages that include comprehensive clarity & history	ExD, Development, Communications	Annually

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C. Human Resources	1. Strengthen volunteer base with clarity of roles and responsibilities; governance best practices	a. Review and revise committee descriptions – with focus on mission statement -- and consider strategies for effective and efficient governing including meeting schedule and alternative methods of communication	Governance, committee chairs, staff liaisons	Annually
		b. Clarify and/or define role of Executive Committee	Exec Com	Fall 2017
		c. Review committee structure and consider alternate strategies to achieve goals including time-limited <i>ad hoc</i> groups and/or projects to ensure relevance, and synergistic collaborations across committees/groups	Exec Com, Governance	FY19
		d. Create a governance committee to establish board, leadership & volunteer norms, nominating committee process, succession planning, volunteer pipeline development, etc.	Governance	Ongoing
	2. Retain and develop professional staff	a. Assess and develop appropriate & collaborative staffing model	Rabbi, ExD	Annually
		b. Identify and make available tools and resources for effective productivity and satisfaction for all positions	VP, ExD, Rabbi	Annually
		c. Build a unified annual performance assessment process and tools for staff	ExD	FY18
D. Infrastructure	1. Care for and enhance our sacred facility to meet the needs of the congregation	a. Provide for the care & maintenance needs of the building facilities including repair & replacement of capital items & other assets	B&G, Building Mgr	Ongoing/Per Capital Maintenance plan

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		b. Manage progress to 2014 Capital Reserve Study to revisit facility needs	B&G, Building Mgr	Quarterly
		c. Study options for Education Center to ensure best use by JRC, consider other building rental/use options	B&G, Building Mgr, President	FY18
		d. Review facility and land usage for greatest needs with particular focus on inclusion of all congregant needs (i.e. JRC Family Room, parking)	B&G, Building Mgr, Inclusion	FY18
		e. Study and recommend changes in campus security. Work with our campus partners.	ExD	
	2. Develop comprehensive Information Technology plan with appropriate resource to manage the business and ritual needs of the congregation	a. Research, evaluate & propose technology required to be a highly efficient organization with the ability to use data in decision-making (i.e. membership & fundraising database, financial management software, congregational history)	ExD	FY18
		b. Research best technology options for worship accessibility for implementation (sound system, streaming worship)	ExD, Rabbi	FY18
	3. Develop strategic communications plan to address regular modes, timely/urgent messages, policy decisions, etc.	a. Determine best modes of communication	VP, ExD	FY18
		b. Create process & deadlines for each communication need	ExD	FY18

Footnotes

1. **Owner(s)** – Owners are responsible for ensuring progress is made on the strategic initiative. They may appoint members of a committee or other staff to work on the initiative. If more than one owner is listed, the expectation is for collaboration. The lead owner is the first mentioned in the plan. When a committee is listed, the chair is responsible for ensuring the work is happening. Owners are responsible for determining/defining success and the pathway or process to be used.
2. Items marked with an **asterisk (*)** indicate that a task force or committee will be created/appointed by the President.
3. **Timeline** indicates time frame for accomplishment of the task and/or reassessment.
4. **Updates** – the board will review the progress to goals quarterly, as appropriate.
5. The **Vice Presidents of the Board of Trustees** will assume responsibility for the overall Strategic Plan, monitoring activity/progress and ensure owners are prepared for reporting deadlines.

Task Forces:

- Religious school strategic planning
- Membership support models
- Israel discourse

Abbreviations:

RPC – Religious Practices Committee

ExD – Executive Director

EdD – Education Director

EC – Executive Committee

RS – Religious School

B&G – Building & Grounds

VP – Vice President