

ENSURING JEWISH CONTINUITY AT TBZ

Report of the Temple Beth Zion Strategic Thinking Group June 2014

Introduction

In August 2013, the Board of Directors asked us to initiate and launch a process of thinking about the future of TBZ. Since then, the Strategic Thinking Group (or STG for short) has met many times. From the start, our study has focused on four areas: Programming – Demographics – Staffing – Building. Our work plan included interviews with both Rabbis and our Executive Director, a community wide survey, tour of our physical plant, review of TBZ's mission, vision and goals, input from Board members and members of the Building, Development, and Mishpachot committees, and an architect. Our work plan also included plans for a final report to include suggestions for next steps, hence the report that you are now reading. No doubt that these suggested next steps for implementation will evolve further over the next one to three years as our community continues to grow.

הוא היה אומר לא עליך המלאכה לגמור ולא אתה בן חורין ליבטל ממנה He would say, *It is not upon you to finish the work, but neither are you free to desist from it.* Mishna, Pirkei Avot 2:15-16.

Based on the past eight months of working on this project, it certainly appears that the TBZ experience is appealing to current members, and that the experience will need to evolve in order to retain a high level of satisfaction for members and also be attractive to potential new members. In summary we can report at this time that in the areas of Programming – Demographics – Staffing – Building:

Programming: Members are looking for even more programming. Suggestions included: more adult programming - movies, text study, social justice, Israel, Hebrew language; weekly Shabbat programming for families and including grandparents; more singing; twice per week after school programming; and adding in more teenage programs.

Demographics: This year (2013/14) we have about 340 households, which includes 10 students and "under 32" at highly reduced rates, as well as many others (approximately 33%) who receive abatements depending on need. There are different ways to count membership, and our recordkeeping has not been entirely consistent, so comparisons are difficult. It appears that our overall paid membership took a significant dip during the early part of the recession when we lost between 20-25 memberships, and has been relatively stable, with some small losses, since 2010.

Within these overall numbers, there have been more losses in single memberships than "family" memberships (for this purpose, "family" is any household with 2 or more individuals), and there has been significant increase in the number of families with children, from 88 households in 2010 to 114 today, and the number of children in the community keeps increasing, now numbering nearly 200 from newborns to age of 18. As a result, today we have many more "souls" in the congregation that we had even 4 years ago.

Staffing: In the next one to three years, our program staffing needs will increase in order to continue provide top quality programs for Adults, Mishpachot, and Beit Rabban from pre-K through grade twelve, and activities for babies and toddlers.

Building: Our building is in need of updates and repairs that need to be worked on very soon in order to avoid being irresponsible and allowing the building to deteriorate further. As our programming expands – as befits a growing community – some areas of our building will need to be re-imagined in order to provide quality programming space for adults, families and children.

Each of these areas is intertwined one with the other. Our suggestions for next steps at the end of this report came out of our efforts to think strategically together about meeting the needs of the whole TBZ community as we continue to grow. This report is part of an ongoing process, and sets out our thinking so far. Our objective is to outline a vision for the future that can inform our actions for the coming years.

אל תפרוש מן הצבור *Do not be apart from the community. Mishna, Pirkei Avot 2:4*

Put another way, *Tous pour un, un pour tous All for one and one for all. d'Artagnan in Dumas' The Three Musketeers.*

History

The last comprehensive assessment of our future as a congregation was completed over seven years ago, in 2007, by the Growth Committee, which concluded that it was important for the synagogue to keep growing, focusing on two dimensions - outward or physical growth (more members, more money, more staff, etc.) and inward growth (more members who become involved, more learning, more spirit). Here are the eight recommendations from that report:

- TBZ should embrace growth along all dimensions.
- We need to pay attention to who we want to have as members, and make a special effort to fill holes.
- We need to continue to innovate as we expand the boundaries of how we educate and include the children in our community.
- TBZ should find ways to deepen and enrich the experience of community and intimacy among its membership.
- Build the active core.
- Create a path to leadership.
- It is time to add additional professional staff; we need to be thoughtful about how to do it.
- We should expect that, at some point, we will outgrow our space for the High Holidays, and should be creative about solving the problem.

Those recommendations led to many significant changes, including: hiring Rav Claudia; expansion of our children's and family programming; a major change in the structure of our Board and committees to create a path to leadership; undertaking a major renovation of our community room and kitchen area; and continued emphasis in all our activities on "building the active core."

The 2013 Survey

Our survey was designed in September and October 2013 by the STG with active input from both co-presidents, both Rabbis and the Executive Director. The survey went live during a three week period in November 2013 and 183 members participated – a significant portion of our membership. The timing of the survey allowed for its review with the Board and initial presentation at the Community Meeting in December. The survey data was combined with interviews, deliberations within the Board, building tour, and budget process in order to present our current report.

The majority of respondents had been members of TBZ for more than five years and one third of respondents had been members for two to five years. To the multiple choice question, "What activities/aspects draw you to TBZ the most?" three quarters responded 'being part of a community that shares common values', one quarter responded 'children's programs from birth through grade 12' and half responded 'adult programming'. More than half replied that they are in the TBZ building from one to four times per month. Just about half had children between the ages of newborn and eighteen. In response to the question "Over the years has the amount you've donated to TBZ increased, beyond your annual dues", 75 members report that it has gone up, 78 report that it has stayed the same and 20 report that it has gone down. At the same time 48 report that they would increase their annual contribution and 122 report that it would stay the same when responding to the question "In order to help finance changes that growth will bring do you anticipate that you will be able to."

As far as programming and building improvements, members are looking for more and better. Amongst these suggestions are: weekly Shabbat programming for families and including grandparents; more adult programming - movies, text study, social justice, Israel, Hebrew language; more singing; twice per week after school programming; and adding in more teenage programs. Members are hoping for a bigger space for their life cycle events with improvements that make the overall feel "friendlier" including the entranceway, coat rooms and restrooms. The third floor was frequently mentioned in need of upgrade for all ages, with a focus on classrooms for Beit Rabban, lounge and meeting space for adults, and activity area for teens.

A preliminary report of the results of the survey was shared at the Community Meeting in December 2013 and a more detailed report is available upon request.

Mission

TBZ's formal mission statement is below. This was approved by the Board as part of the 2007 Growth Committee report, and was recently reviewed and slightly revised by the Board at a meeting in early 2014 based on based on recommendations of the STG (changes are shown in italics):

TBZ is an independent, inclusive Jewish congregation whose members *of all ages* are committed to each other, to joyful participatory worship, to *meaningful Jewish learning*, spiritual growth and acts of social justice.

Vision

Based on the mission, the results of the survey, and our many conversations with each other, the Rabbis, the Board, and many members of the community, STG has proposed the following Vision for TBZ. This was presented to the community by David Chersonson in at the December 2013 Community Meeting, and has provided the basis for our work since then.

1. TBZ is a growing and evolving community. While the total number of household member units has remained about the same, the actual number of people, of all ages, who are members, attend services and programs, and spend time in the building has increased. At the same time, TBZ is an evolving community. We have welcomed many young families, with teens, younger children and babies, and we have established a flourishing Beit Rabban (house of study) program. These demographic trends create opportunities for growth and also challenges in terms of our identity, staffing, space and resources.
2. TBZ must remain a cohesive inter-generational family that serves the needs of all members. One aspect of TBZ that makes our shul different, and special, is that we are in inter-generational community. As we evolve, how can TBZ continue to serve the needs of all of its diverse groups (children, adults, seniors, families, singles, LGBT members, and others) without splitting into multiple groups that share one building? Maintaining our cohesive identify will require work by TBZ to meet the needs of all its members (for example, excellent educational programming for *both* adults and children) and also a commitment by its members to become and stay connected to each other.
3. TBZ can become an even more vibrant, responsive and innovative synagogue. We are an amazingly active synagogue, but we can always push ourselves to do more. Many of us attend services on Shabbat and the Holidays, and many of us also regularly participate in our rich programming – spiritual, intellectual, religious, cultural, and social. We should continue to “think big” about the exciting and enriching opportunities we can provide. Rather than simply continuing to do what we have been doing, we must strive to become even better. Of course, new projects will require more funding, and setting ambitious goals for TBZ means attending to long-term financial needs as well.

Goals

The STG, working closely with the Board, believes that the following five goals are the specific items to focus on during the coming years so we continue to thrive as a Jewish community. In Appendix A at the end of this report, for each of these goals, we have proposed Action Items and a Timeline – specific activities for the staff, the lay leadership and the entire congregation.

1. To strengthen and deepen our COMMUNITY by preserving our large, inclusive and diverse membership, while also sustaining and building the active core of lay leaders and regular participants.
2. To provide excellent and innovative PROGRAMMING, including formal and informal education, which serves adults, children, families, and the TBZ community as a whole, and which also attracts non-members from the broader community.
3. To significantly invest in our BUILDING to address short, medium and long term needs, including space for expanded programming for Adults, Mishpachot and Beit Rabban.

4. To add STAFF to our current team, possibly including a full or part time Program/Education director to work with the Rabbis on both children's and adult programming.

5. To achieve FINANCIAL STABILITY, including a budget with a little positive margin so we are not always living on the edge, and reasonable financial reserves.

Throughout our work, two areas were frequently mentioned that deserve further mention and description: Programming (including children, family and adult programming) and Financial Planning.

Programming

Mishpachot, Beit Rabban

The goal of the Mishpachot program is to develop children's and family programming that aligns with the values and needs of the TBZ community as a whole. The Mishpachot committee, together with our Rabbis and talented educators, invites families to become part of the greater TBZ community by creating opportunities for children, parents, and the entire membership to learn and celebrate together. Beit Rabban (Hebrew School), Shabbat services, intergenerational programming, retreats, B'nei mitzvah education, teen programming, and youth group activities are just some of the ways we stimulate, educate, and celebrate the families and children in our community.

Currently, TBZ's Mishpachot program serves 194 children from TBZ families. TBZ's Beit Rabban provides education for 41 children in grades Kindergarten through 7th grade. In addition to Wednesday afternoon programming, TBZ piloted an optional eight-week intensive Hebrew program for Beit Rabban students in grades K-7. And through the new Madrichim program, teens are able to assist the Beit Rabban teachers in their classrooms.

Beit Rabban students and their families are strongly encouraged to attend at least one other family oriented event at TBZ per week. These events can include:

- Saturday morning children's Shabbat services (held twice monthly)
- Family education and holiday programming (approximately monthly)
- Friday night multi-generational Kabbalat Shabbat service held at 1550 Beacon Street (monthly)
- A monthly Rosh Hodesh program for girls in 8th and 9th grade
- Family dinners (twice per year)
- Community Retreat (annually)

Over the next three to five years, in response to a growing contingent of families TBZ would like to expand all aspects of Mishpachot programming. This expansion could include an optional second day of Beit Rabban that offers more targeted learning of Hebrew language, social justice, and prayer, with the possibility of this second day becoming a requirement for children in grades six and seven. In order to accommodate the growing numbers of children in each grade, the total number of Beit Rabban classrooms will likely increase from five to about eight. TBZ would also like to offer weekly Friday night and Saturday morning Shabbat services geared toward children and families (compared to current biweekly services on Saturday morning only).

In addition to expanding existing programs, TBZ will also introduce new programming for two segments of the Mishpachot population that to date have not been well served: teens and children aged zero to four. Teen programming could include Beit Rabban High

for 8th to 11th graders, a teen program for boys (similar to the existing Rosh Hodesh group for girls) and offer educational trips to NYC for 8th graders and Israel for 12th graders. We look forward to holding monthly social/service oriented events for teens and continue to host teen Shabbats throughout the year. We also hope to engage teens in leadership building experiences (e.g., leading younger children in prayer) as well as committee work at TBZ. For our youngest members, aged zero to four years, our plan is to implement a new welcoming system for newborn babies, and host monthly gatherings for parents and young children.

In the next three to five years, our staffing needs will likely increase considerably in order to manage the expansion in programming. Our needs will include: One Programming/Educational Director (responsible for Beit Rabban, Teen Programming, and activities for babies and toddlers); eight or nine Beit Rabban teachers plus two aides; four tfilah leaders; a Rosh Hodesh group leader (for girls and for boys); and leaders for Friday night Mishpachot programming, teen programming as well as the 2nd day of Beit Rabban.

Adult Programming

Adult Programming at TBZ is meant to nourish the mind, body and spirit, and to foster intergenerational connections within our community. TBZ's Adult Learning Committee is continuing to expand on the many topics that have been important and relevant to members of our community. We are blessed at TBZ with an outstanding group of experts and professionals who can lead us and inspire us along with our stellar rabbis as well as several presenters from the Boston Jewish area.

Adult program opportunities include a diverse array of offerings offered at all times of the day and evening on issues of concern to the TBZ and wider local community such as: a series of evening classes, post-Kiddush speakers on Shabbat afternoon, evening and daytime presentations that encompass social action, conversations on Israel, exploring the classical as more modern texts, the arts, Torah study, meditation sessions, feminist-oriented subjects, square and folk dance evenings, and film and books clubs and reviews.

In the next few years, programs and classes for all ages will be designed to promote deeper intergenerational connections will include holiday learning with preparations for deepening our enjoyment of the Jewish holidays and other commemorative and life cycle events during the year. Plans are under way to add new programs such as tips for "spicing up" your holiday cooking, activities for the Jubilee year, learning about current trends and issues in the Jewish communities of Poland, the African-American and Russia and in the scientific worlds that impact all of us. In addition, there will be continued planning and collaboration with both the Israel and Tikkun Olam committees, as well as with the Beit Rabban and Mishpachot members. Adequate staffing and comfortable spaces will be needed to allow for these programs to flourish and elevate TBZ to its fullest potential.

In other words, Mishpachot, Beit Rabban and Adult programming strive together to provide something for everyone to grow on and connect more deeply within our TBZ community.

Financial Planning

אם אין קמח, אין תורה. אם אין תורה, אין קמח. When there is no bread there is no Torah. When there is no Torah there is no bread. *Mishna, Pirkei Avot 3:21*

Financially, TBZ has operated on a generally break-even budget for many years, running small deficits in some years, and small surpluses in others. Although we continue to run a very “tight ship” with no fat, costs have continued to increase, with a current budget of approximately \$800,000 for the current (2013-2014) fiscal year. Of our total revenue, about 65% comes from dues, 15% from the annual appeal, 10% from other contributions, and 10% from program fees, rent, and other sources. The budget is currently under some stress, and the Board has implemented a modest dues increase for the next fiscal year. (Prior to this, dues had not been increased for the past 3 years.) We do not have an endowment other than our building, which is debt free, and we have only very modest reserves. In order to continue thriving, TBZ’s financial planning will need to look at income as derived from increases in donations, dues, fees, and grants.

In order to accomplish these goals and based on our research and meetings with the Treasurer, Executive Director and members of the Building, Development and Mishpachot Committees, we need to make a significant capital investment in our community, consisting of two parts, physical (building) and organizational (staff and programming). We have a wonderful, valuable building, bequeathed to us by prior generations, and it is our responsibility to maintain and improve it. The significant increase in the number of children in our community from around 100 in 2007 to nearly 200 today, and the success of our adult, children’s and family programming, is putting increasing strain on our facilities. To continue, we need to both (i) address some basic deficiencies in the building, and (ii) create new spaces within the building and find ways to creatively use the spaces we have. This will certainly include some renovation of the third floor and improving storage throughout the building, and may also include more creative ideas, such as finding a way to utilize at least one of the two rooms above the bima at the rear of the building or, literally, raising the roof to create more space. Our proposed capital budget for building needs, based on very rough estimates, is \$300,000.

In addition to physical work on the building, we need to invest capital to build our programming and our staff capacity. The current year’s budget projects a deficit, based on investment in additional staff capacity, and we expect deficits for several more years as we build our capacity. With modest membership increases and dues increases, these deficits could possibly be eliminated over several years, but we are now at a critical juncture. Our proposed capital budget for staff and programming needs, based again on very rough estimates, is \$200,000. We also need to find a way to create a healthier reserve, so that, going forward, we have more of a cushion.

Taken together, we are recommending the planning and execution of a three year TBZ Revitalization Campaign that will raise approximately \$500,000, over and above the amount of regular dues and regular annual contributions, and which includes building improvements and renovation as well as investment in staff and programming.

There have been three previous capital campaigns since the new TBZ got off the ground about 15 years ago, raising a total of about \$1,000,000, so this will be our most ambitious effort to date and, we think, in many ways the most important, because it is critical to our effort to insure Jewish continuity here at TBZ.

Implementation Plan

The STG grappled with how specifically to approach the implementation steps necessary to achieve the goals articulated in this report.

TBZ has a committee process and it is through the committees, and the staff and Rabbis assigned to the committees, that much of the community's work gets executed. Also, the goals are interdependent (for example, enhancing adult and children's programming depends on the building, staff capacity and finances) and it is only through the Board, and the relatively new Vice President system, that a mechanism could be developed to ensure that the work gets done and the different committees coordinate and communicate and appropriately report to the Board.

Therefore, it is the STG's recommendation, that each of the previously described five goals be assigned to key staff and Rabbis (when appropriate), Vice Presidents and committees and agreed upon time frames be developed within the committees. The STG describes in Appendix A the key players necessary to achieve the results articulated in this report including: membership strengthening and support; building programming capacity for adults, children and families; ensuring financial stability; strengthening administrative support; and upgrading and enhancing our building.

The STG further recommends that the Co-Presidents (or their designees) be responsible for ensuring that the various committees are working through the steps necessary to implement the goals of this report, ensure coordination between committees, and keep the Board apprised of progress and challenges.

In Conclusion

Our task has been to think about where TBZ has been, where it is right now, and where it might be headed, and to do so in strategic ways. In a way, we have been archaeologists, data collectors and futurists. TBZ has such a rich history and has already touched so many people in so many ways. We hope that this collection of data and suggestions for actions help to continue our success story for us and the next generation. With a great deal of poetic license, we continue to be guided by the concept described in Leha Dodi at Kabbalat Shabbat *סוף מעשה במחשבה תחילה* *that thought precedes creation*.

Respectfully submitted,
TBZ Strategic Thinking Group
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APPENDIX A **Proposed Action Plan**

Keeping in mind that our study has focused on the four areas of Programming – Demographics – Staffing – Building, we suggest the following preliminary Action Plan, to be reviewed and refined by the Board and the respective committees. There are two elements for our recommended Action Plan. First, there are a series of specific activities that we suggest be undertaken immediately and completed by June 2015; these range from making sure we use entry and exit interviews to better understand our members, to exploring and possibly implementing a new dues structure. These are working lists, arranged based on each of the five goals above, with specific assignments to particular TBZ staff members, vice presidents, and committee members, and a time frame for each activity. As mentioned earlier in this report, each of these areas is intertwined one with the other. Our suggested Action Plan came out of our efforts to think strategically about meeting the needs of the whole TBZ community.

AREA: COMMUNITY, KEY PLAYERS: MEMBERSHIP COMMITTEE

- Perform gap analysis to determine if/where TBZ could be more inclusive. June - December 2014
- Methodically build the core of active members. Ongoing
- Examine ways to use our exit and entry interviews. June - December 2014
- Thoughtfully nurture relationships between members. Ongoing

AREA: PROGRAMMING, KEY PLAYERS STAFF, MISHPACHOT COMMITTEE, ADULT EDUCATION COMMITTEE

- Develop an holistic approach to programming that aims to serve the needs of the many overlapping segments of TBZ, including adults, children, families, and the entire community - June 2014 – March 2015
- Provide quality staff and adequate space for Beit Rabban, Mishpachot, Adult, and Community programming. Ongoing
- Ask current staff of Beit Rabban to complete growth plans for staffing and space, assuming (i) natural growth and (ii) marketed growth. June - November 2014
- Consider the possible need for a full or part-time education/programming director. March 2015 – December 2015
- Better publicize programming to the broader community. Immediate/ongoing

AREA FINANCIAL STABILITY KEY PLAYERS STAFF, FINANCE AND DEVELOPMENT COMMITTEES

- Explore new dues structure and, if approved by the Board of Directors, be prepared to implement. June 2014 – January 2015
- Design and implement an approach to solicit donations from Mishpachot parents and grandparents. June - August 2014
- Identify and cultivate major donors and sustainers. Ongoing
- Design a shopping list of financial needs and implement an approach for specific requests to potential donors. June - December 2014
- Consider the feasibility of an events model to generate additional revenue. Ongoing
- Research and apply for grants. June 2014 – June 2015

AREA ADMINISTRATIVE SUPPORT KEY PLAYERS VP ADMINISTRATION AND EXECUTIVE DIRECTOR

- Analyze the support needs of the Rabbis and lay leaders and assess the current capacity to meet those needs. June 2014 – November 2014
- Promptly implement a plan that is designed to provide quality support. Immediate - Ongoing

AREA PHYSICAL PLANT KEY PLAYERS EXECUTIVE DIRECTOR AND BUILDING COMMITTEE

- Assess and report on current and on-going needs to maintain the building. Immediate – August 2014
- Invite three architects to provide plans, both for renovation and possible expansion. Immediate – November 2014
- Make inquiries to town officials concerning renovation and expansion. Immediate