

Temple Beth El

2013-18 Strategic Plan

Appendices

Our intent in providing these documents is to help other congregations with their strategic planning processes. If you use any of these materials, please credit "Temple Beth El, Tacoma, Washington."

The strategic plan itself may be found on TBE's website, <https://www.tbetacoma.org>

Appendix I – General

- Lessons learned and suggestions for other congregations
- List of references

Appendix II – *Inquire*

- Information for the strategic planning committee from Carolyn Cohen re: March-April 2012 *Inquire* sessions
- AI handout for March-April 2012 sessions
- Peak experience & wishes handout for March-April 2012 sessions
- *Inquire* survey (hard copy)
- *Inquire* survey (electronic)
- Summary of *Inquire* themes and photos of themes on flipchart pages

Appendix III – *Imagine*

- *Imagine* postcard/ad for June 2012 *Imagine* session
- Agenda for *Imagine* session
- *Imagine* question handed out to attendees at *Imagine* session
- Photos of posters created at *Imagine* session

Appendix IV – *Innovate*

- Slideshow for January 2013 leadership training session
- Design statement instructions handed out to groups at the January 2013 session for the three strategic areas
- Form used to track committee work on design statements for *Innovate* step
- Suggested meeting structure for *Innovate* committee sessions and how to use resources handout

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Tips for other congregations re: strategic planning
Temple Beth El – Tacoma, Washington
Prepared by Shelley Rozen, Strategic Planning Committee Chair
May 2013

Background of Temple Beth El

Temple Beth El in Tacoma, Washington, is affiliated with the Reform Movement, and is a member of the Union for Reform Judaism. The origins of the congregation date back to the late 1800s. Temple Beth El was formed in 1960 as the result of a merger between two Tacoma congregations—one Reform and one Conservative. We currently have approximately 275 member families. Tacoma is located about one hour south of Seattle. According to the 2010 U.S. Census, the population of Tacoma is 198,397, and the population of Pierce County is 795,225. With the exception of Chabad, there are no other synagogues in Pierce County, and members of Temple Beth El drive from rural parts of Pierce County and from neighboring counties (up to one hour of driving time) to participate in services, religious school, and other events. We have a full-time rabbi and a full-time cantor/education director, plus office support staff.

Recommendations for other congregations considering engaging in a strategic planning process

- Have two strategic planning committee co-chairs. Chairing the strategic planning committee at Temple Beth El was a great deal of work for one person, even in our smallish congregation.
- Recognize that you may lose committee members over the course of the process, so recruit enough people that you still have a strong committee by the end of the process.
- Recruit your committee members carefully; don't just advertise for participants. Ensure that your committee has adequate representation from different age groups and that it is as diverse as possible. We had a high-school student involved in the first year of our process (until she left for college). In addition, try to get strong representation from people familiar with the way nonprofit organizations operate.
- Ensure that you have strong support from the president of the congregation and from clergy. This support was one of the reasons our process was a success. Our process took almost two years, and in that time, a new president began his two-year term. We had the original president, the new president, and our next president all involved as strategic planning committee members. This means that strategic planning committee members have been/will be in the role of president for a total of six years, which will help to institutionalize the strategic plan.
- Another key to having a successful strategic planning process at Temple Beth El was that we were able to hire a consultant who was an expert in Appreciative Inquiry, thanks to two grants from the Jewish Federation of Greater Seattle and some matching funds from our board of trustees. We highly recommend having an outside expert help with the process. We maximized our consultant's time by having her train strategic planning committee members to lead subsequent congregational forums for the *Inquire* stage, and by having her train the strategic planning committee members, the chairs of TBE's other committees, and board members in how to create design statements for the *Innovate* stage.

**Resources we used for strategic planning
Temple Beth El – Tacoma, Washington
Prepared by Shelley Rozen, Strategic Planning Committee Chair
May 2013**

Electronic resources

Alban Institute materials: <http://www.alban.org/conversesearch.aspx?id=1410>

We especially found articles by Paul Chaffee and Mark Lau Branson to be quite helpful.

We also used materials from the Congregational Resource Guide, which is now defunct and is being archived by the Alban Institute.

Temple Beth-El, Providence, Rhode Island: <http://www.temple-beth-el.org/>

We adopted the format of their strategic plan, which also used Appreciative Inquiry. We also reviewed strategic plans from other synagogues and churches.

Union for Reform Judaism: <http://urj.org/>

We consulted with their staff early in our process.

Appreciative Inquiry Commons: <http://appreciativeinquiry.case.edu/>

We found materials by David Cooperrider to be particularly helpful.

“Claiming the Light: Appreciative Inquiry” by Paul Chaffee:

<http://appreciativeinquiry.case.edu/uploads/Chaffee,%20Paul-Claiming%20the%20Light%20-%20AI%20and%20Transformation.doc>

Books:

Memories, Hopes, and Conversations: Appreciative Inquiry and Congregational Change by Mark Lau Branson, Alban Institute, 2012.

Although this book describes the use of AI at a church, we used it extensively and found it quite helpful.

We used many of the appendices from the book to educate the strategic planning committee and the congregation. The appendices are available electronically for those who own the book.

The Thin Book of SOAR: Building Strengths-Based Strategy by Jacqueline M. Stavros, Sue Annis Hammond (Editor), Gina Hinrichs, Thin Book Publishing Company, 2009.

This book contained helpful information about the difference between SOAR (a strategic planning approach that uses Appreciative Inquiry) and the traditional SWOT method of strategic planning. Information was presented clearly and concisely, and we found parallels to our process.

The Thin Book of Appreciative Inquiry by Sue Annis Hammond, Thin Book Publishing Company, 1998.

The Power of Appreciative Inquiry: A Practical Guide to Positive Change by Diana Whitney and Amanda Trosten-Bloom, Berrett-Koehler Publishers, Inc., 2002, 2010.

- Do your best to involve as many congregants as possible in the strategic planning process. Recognize that the process may be just as important as the product—the strategic plan—that is developed as a result of the process.
- Most of the attendees at our *Inquire* and *Imagine* congregational forums came as a result of personal invitations from the strategic planning committee chair and other members of the committee. Had we personally called and emailed more congregants, we would have had an even greater attendance.
- Devote a minimum of six months to working with your congregation’s committees to develop design statements and objectives in the *Innovate* stage. Allocate additional months if you want the committees to also develop action steps.
- One of TBE’s committees was not very enthusiastic about participating in the creation of design statements and objectives. Even though two strategic planning committee members attended this particular committee’s design statement creation meeting, committee members responded that it wasn’t their job to plan, and their original design statements did not meet any of the stated design statement criteria. They tried several times to abdicate responsibility for creating their portion of the plan. The strategic planning committee chair spoke one-on-one with the chair of that committee, who accepted her offer to attend that committee’s next meeting to help them. The meeting went fairly well, and the committee members eventually came around. The strategic planning committee chair anticipated ahead of time that there might be push-back from this particular committee; she should have attended their original meeting herself. Our recommendation is to anticipate opposition from at least one committee and ensure that the strongest strategic planning committee member works with that committee from the beginning.
- Finally, we very much recommend using Appreciative Inquiry as your strategic planning model. It worked very well for us and got a number of congregants involved that may not have participated had we used a different model.

Temple Beth El
Inquire Notes and Protocol
Prepared for February 26, 2012 Strategic Planning Committee Meeting

Prepared on February 21, 2012

Following are some notes and suggestions that may be useful to you in preparing for the first phase of your Appreciative Inquiry experience. You will note that the structure is clearly laid out, with timing down to the minute. However, let's keep in mind that this is an organic process, and there may be times when fluidity is called for as well. The most important part is that, a) all of the participants' voices are heard, and articulated within the positive framework of this method, and b) everyone is open to whatever stories and wishes surface, as this is an inquiry process and we are excited to hear what might arise.

Format: We are assuming that the Inquire phase will consist of at least three gatherings, more if needed. The sessions could be hosted in congregants' homes, or perhaps one could be at TBE. It looks like each session will take about two hours for the "work". It would be nice to have it set up so folks can visit afterwards. It will disrupt the process if people come in late, so you will need to figure out how to make sure participants know to come on time. I would suggest that you wait and hand the questions out at the session rather than publicizing them, just so that they don't over-think this and it is a fresh experience for them.

Attendees: No one (except committee members) would attend more than one of these sessions. One session will be for the youth/post b'nai mitzvah crowd. For the others, it might be best to just set a couple of dates and locations, and then try to recruit a diverse group of members to attend one or the other.

Strategic Planning Committee Member Roles : We are assuming that several of the committee members will attend the first session, and participate by sitting with/interviewing folks they don't know. If possible, we should plan a little time to debrief after that session. Then, the committee members will facilitate the future sessions.

Supplies Needed: Flip charts and markers. One flip chart for each group. Copies of the questions—one per person. Paper with hard backing and pen so that each attendee can make notes for themselves.

Inquire Session Structure

- It will be good to have at least two facilitators. If there are 24 attendees, it would be great to have three, as that would allow one to sit in on each of the small groups.
- One person will introduce the session, and how it all works, and provide some simple instructions. See suggested bullet points for this below.
- Members will be asked to pair up. They will interview each other, using the question set below. They will be encouraged to use probes to draw out a complete story from each other.

- Each person will relate their partner's story to the group (depending on number of attendees, this will be a large or small group experience). You don't need to write the stories on the flipcharts, although you might want to make a note for yourself of some of them. These might be shared later when you tell your story to other audiences, perhaps through the URJ.
- The small groups will work together to identify overall themes and write them on the flipcharts. It would be good to have one committee member in each group to facilitate theme identification. The themes will be likely be drawn from the articulation of the three wishes.
- Finally, the group comes together as a whole and shares themes. The facilitators can note the overall themes on the flipchart as well.

What Happens After the First Session?

- Each successive session, including timing, may be tweaked, based on any lesson learned from the prior one.
- The committee will decide about making the surveys available electronically. You can just send out the same questions below. This might be best to do after the in-person sessions are completed.
- Themes will be collected, reviewed and analyzed by the committee. You can see in the newsletter description from Kol HaNeshamah that you will want to allocate sufficient time for this task. These findings will inform the next AI phase, "Imagine", currently scheduled for May.

Facilitator Talking Points and Inquire Questions

Introduction Talking Points: Introducing the AI experience

The facilitator(s) will need to watch the time carefully. See the agenda below. Here are a few talking point ideas:

- Welcome to the session. Thank you for coming! Introduce yourself
- The TBE Strategic Planning Committee member received a grant from Federation to develop a strategic plan based on AI
- AI is a way of systematically capturing what we have learned from successes. We focus on the best of what has happened, and study (inquire) what made it so good, and then craft a plan for ourselves to make more of that happen.
- It is a four-step process and this phase is the first step. We will take what we learn today and from subsequent sessions, and develop the collective findings into themes. Then, at a community meeting in May, we will use all of this information to develop a vision, and clear steps for how to get there.
- The committee will incorporate findings into developing a strategic plan, which will be implemented in the fall.
- We welcome your participation in other steps of the process. Let us know if you want to engage more with this work.

Interviewing Exercise Talking Points

We are going to ask you to pair up with someone you don't know well. And then we will divide you into (2 or 3) groups. Then, we will hand you a set of questions. You will each take 10 minutes to think silently about your answer. Please feel free to take notes. Then, you will interview each other for 10 minutes each. When all the interviews are completed, you will share your interviewee's responses with your group.

- AI Interviews are an exercise in deep listening.

- When you are the interviewee, it is appropriate to employ all of the probes that you see listed in your handout. Feel free to ask for clarifications.
- Although this will be difficult, do not share your own experience in any way. The interviews are not a dialogue. So, although it will be tempting to chime in, especially since you may have shared experiences, just keep asking questions.
- Facilitator then reads the question aloud.

PEAK EXPERIENCE

Think back on your involvement with Temple Beth El. When was a time when you felt the most sense of pride in being affiliated TBE? What exactly took place? Describe what you were doing and what others were doing. What factors contributed to the pride you felt? Tell the whole story about that experience.

- What happened?
- What was your role?
- What contributed to the value of this experience?
- Why does that memory stay with you?

WISHES

If you had three wishes for Temple Beth El, what would they be? If possible, try to think of wishes that make more exceptional experiences, like the peak experience you just described, possible.

Inquire Session Timing

Plan 1: Assuming 3 groups of 8; 24 people total

Task	Timing	Notes
Facilitator introduces the process	10	
Individual think through the questions and make personal notes	10	
Partner Interviews	20	10 minutes each
Summarize partner's story to small group	40	Assuming 8 people per group, 4 pairs
Small group identify themes	15	
Each group share themes with other	22	7-8 minutes each. Need to assign one facilitator/reporter per group
Total minutes	117	

Plan 2: Assuming 2 groups of 10—20 total

Task	Timing	Notes
Facilitator introduces the process	10	
Individual think through the questions and make personal notes	10	
Partner Interviews	20	10 minutes each
Summarize partner's story to small group	50	Assuming 10 people per group, 5 pairs
Small group identify themes	15	
Each group share themes with other	16	7-8 minutes each. Need to assign one facilitator/reporter per group
Total Minutes	121	

APPRECIATIVE INQUIRY AT TEMPLE BETH EL

Understanding Appreciative Inquiry

- Use the power of story telling
- Listen to each other, ask clarifying questions
- Focus only on what worked
- Identify “the best”
- Draw on our collective imagination to envision “what might be”
- Innovate and create the future

Today’s Agenda

- Consider your own peak experience and wishes
- Interview your partner/Be interviewed
- Summarize your partner’s peak experience and positive wishes; share them with your group
- Work with your group to identify common themes
- Discuss themes with the larger group

“While a story can put one to sleep, it can also wake one up.”
Rabbi Nachman of Bratslav

PEAK EXPERIENCE

Think back on your involvement with Temple Beth El. When was a time when you felt the most sense of pride in being affiliated TBE? What exactly took place? Describe what you were doing and what others were doing. What factors contributed to the pride you felt? Tell the whole story about that experience.

- What happened?
- What was your role?
- What contributed to the value of this experience?
- Why does that memory stay with you?

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If you had three wishes for Temple Beth El, what would they be? If possible, try to think of wishes that make more exceptional experiences, like the peak experience you just described, possible.

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PEAK EXPERIENCE

Think back on your involvement with Temple Beth El. When was a time when you felt the most sense of pride in being affiliated TBE? What exactly took place? Describe what you were doing and what others were doing. What factors contributed to the pride you felt? Tell the whole story about that experience.

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WISHES

If you had three wishes for Temple Beth El, what would they be? If possible, try to think of wishes that make more exceptional experiences, like the peak experience you just described, possible.

Temple Beth El members,

You may have heard about the recent “Inquire” sessions that were conducted by the TBE Strategic Planning committee so that the general membership could share their fondest memories of Temple Beth El as well as their wishes for where we should be going in the future. This is the important first step in a process called Appreciative Inquiry, which we will be completing in order to develop a long term plan for our synagogue. If you were unable to attend one of the in person sessions, we still want your input, and you can provide it by either completing an online or paper inquire session.

The online inquire session can be accessed from the following link:

<http://www.zoomerang.com/Survey/.....>

It will be active at this address through April 30th.

If you prefer to fill out a paper version, you will find a copy in your May bulletin. You may drop it off at or mail it to the Temple Beth El office through May 4th. If you participated in one of the in person sessions, you do not need to complete another version.

For more information, please contact Jacob Elstein (jacobelstein@gmail.com) or Shelley Rozen (shelleyrozen@comcast.net).

Thank you so much for your participation,
The TBE Strategic Planning Committee

Temple Beth El - Paper Inquire Session

Temple Beth El's strategic planning committee is using the Appreciative Inquiry process in order to gather input from congregants regarding TBE's strengths and how we can build upon them.

For more information, please see articles on [pages x and x](#).

"While a story can put one to sleep, it can also wake one up."

- Rabbi Nachman of Bratslav

****We prefer that you complete these questions online; however, if you do not have Internet access, please use this printed form and return it to the Temple office by May 4th.*

Feel free to type or write your responses to these prompts on a separate sheet of paper. Simply attach them to this sheet before turning them in.

PEAK EXPERIENCE

Think back on your involvement with Temple Beth El. When was a time when you felt the most sense of pride in being affiliated with TBE? What exactly took place? Describe what you were doing and what others were doing. What factors contributed to the pride you felt? Tell the whole story about that experience.

1.) What happened?

2.) What was your role?

3.) What contributed to the value of this experience?

4.) Why does that memory stay with you?

Please turn over ⇨

WISHES

If you had three wishes for Temple Beth El, what would they be? If possible, try to think of wishes that make more exceptional experiences, like the peak experience you just described, possible.

The strategic planning committee wants to thank you for helping us with our planning process, and we encourage you to attend the next phase, "Imagine," on June 3rd from 10:30 – 12:30 at TBE with a free lunch to follow.

Please return your completed questions to the TBE office by Friday, May 4th.

TBE Strategic Planning Committee Meeting May 14, 2012

Review of themes from Inquire sessions

We sorted the themes from all the March and April inquire sessions, as well as from the questionnaires, grouped them together under five topic areas (see photos below), and summarized the main theme from each of the topic areas in the following way:

Sustainability

**Worship & rituals
Education**

**Larger community (outside TBE) involvement
Sense of community**

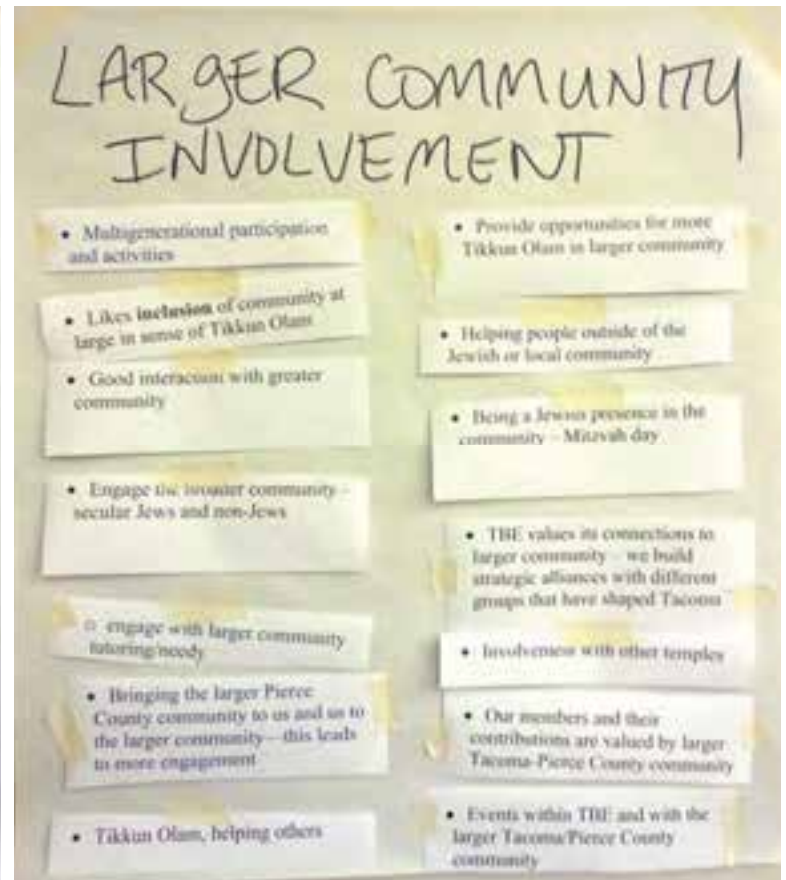
TBE is a welcoming place that is financially stable and its members have a sense of community.

TBE creates opportunities for innovative worship that involves people of all ages.

Lifelong learning and connecting people through formal and informal education are important at TBE while creating a variety of creative avenues to learn.

TBE offers opportunities for tikkun olam, and opportunities for interactive programs within the larger community.

Ownership within the community creates a sense of family at TBE through a welcoming, supportive, and inclusive environment.



SUSTAINABILITY

- Ensure financial solvency
- Provide a physical facility that is multipurpose, functional, attractive, and well run.
- Financial viability
 - raise endowment
- Finances
 - remain free of debt
 - each member pay something
 - fund dresses with capital campaigns
- Finances: no worries about budget, and THE is accessible
- Environment conducive for involvement in temple activities
- Solvent, free of debt
- financial stability
- members have sense of ownership
- welcoming
- ownership attitude
- Willingness to be creative
- Board transparency – more communication

WORSHIP + RITUALS

- Provide opportunities for supportive and celebratory rituals
 - children in services
- Quality with services & events
 - H'nai Mitzvah to attend Saturday mornings
 - student involvement in Saturday service
- We value different traditions in Judaism [i.e. when temples were combined]
- Children's choir and/or other arts/creative outlets for youth
- Saturday services
 - Sunday school involvement
 - more people participating
- Other services/Friday
 - music/instruments
 - yoga/meditation
 - pizza and dancing
 - more congregational participation/reading prayers
- Services
 - regular h'nai mitzvahs, including parents with bar/bat mitzvah students
 - minyan for Saturdays-- promote more Saturday mornings
 - involve children in Rock Shabbat--such as having a variety of instruments
 - Kol Nidre stringed instrument--viola or cello
 - more creative services such as at the beach during the summer
- Willingness to be creative

SENSE OF COMMUNITY

- Welcoming (over) presence in synagogue community-- all ages, genders, etc.
- We do best when we do things together!
- Community support in life cycle events
- Some of community within THE that provides welcome, acceptance, and understanding, of diversity, of traditions, background, and abilities.
- Opportunities for participation and bonding with other Jews
- "Tag" program outreach
- Staff works well to respond to needs of Jewish community [i.e. prep for bar/bat mitzvah, of life cycle events]
- Building community
- Connections of the entire community, across grade levels
- Connection
 - belonging
 - Tradition + connection to all Jews = Jewish identity & pride
 - What you have to offer is recognized
- Collective memory/history/tradition are sustained especially with youth
- Developing the THE community
- pride of ownership, with responsibility, beyond even the leadership program (community members that work with our difference and create together and more together)
- Strong youth program
 - Being with friends
 - Kabb in all flavors-- Tag, Suk, multi-generational, events
 - Ownership attitude
- Community
 - fun
 - not just to do work at temple (volunteering)
- Participation in small group activities and larger congregational events
 - Connection
 - Energy
- Congregation as family (for example, people attend h'nai mitzvah celebrations)
 - drives to bring people to services
- Events and tags for all ages, not just high schoolers



Sunday, June 3rd, 10:30 a.m.

Come together with your fellow congregants to envision Temple Beth El's future.

Join us at "Imagine," the second phase of TBE's Appreciative Inquiry strategic planning process. All adults and teens are welcome at this creative session! The event will be followed by a free lunch, and free babysitting is available.

Please contact Rebecca in the Temple office to RSVP by May 31st.
rfarley@templebethel18.org or (253) 564-7101.

**Agenda for June 3rd, 2012 Imagine Session
 Internal Version: for Strategic Planning Committee Members**

Task	Time	Notes
Check-in	10:15	Participants enter, get coffee, nametags, and sit at assigned tables.
<u>Welcome</u> . Strategic Planning Committee welcomes, acknowledges all members, introduces purpose, introduces facilitator. Cantor Holland leads song.	10:30-10:45	Craft language to manage expectations. Each SPC member sits at a table, takes notes as seems appropriate.
<u>Instructions</u> . CC describes protocol for today	10:45-10:50	
<u>Individual Reflection</u> . Distribute Imagine Question. Individual takes own notes on response.	10:50-11:00	Participants silently reflect and make their own notes.
<u>Share Stories</u> . Each person tells his/her highlights to others at table.	11:00-11:35	8 people per table, about 4-5 minutes per person. SPC members might take their own notes to share later with committee as stories are being told.
<u>Capture big ideas</u> . Each participant notes down 1 “big idea” that they feel should be included in the collective vision. It could be their own idea or someone else’s. They write out their ideas on a piece of paper and post it on the flipchart or wall.	11:35-11:40	½ page sticky notes would be great, otherwise half page paper with tape. Facilitators: we want this to move very quickly.
<u>Collective Vision</u> . Table works on vision together, draws it out.	11:40-12:00	Using paper and markers at tables.
<u>Share out</u> . Each group comes to mike to share out.	12:00-12:35 (or so)	Each group presents with mike at front. Assuming 8 tables presenting. CC write down high level themes as they go.
<u>S.P. Committee shares next steps</u> . Takes questions on process. Review purpose, manage expectations. Invites others to join/review in that process, notes clipboards	12:35-12:40	Shelley will share next steps and also make the request regarding

<p>with options. etc.). Notes two more tasks:</p> <ol style="list-style-type: none"> 1. Using note cards on table, write down anything you think was missed in the discussion that you want to make sure the committee hears. 2. Discuss during lunch: <i>What did you discover today that you didn't know before?</i> 		<p>the note cards. They can use the cards for two purposes: 1) to record any thoughts they want to make sure the committee sees 2) To respond to the lunch discussion question.</p>
<p><u>Closing</u>. Cantor Holland leads closing song. Rabbi Kadden says closing words and leads hamotzi.</p>	<p>12:40</p>	
<p>Lunch</p>	<p>12:45 (or so)</p>	

Purposes of Imagine Session

- The overall purpose is to inform the strategic planning process.
- This session allows the community to dig in and flesh out the themes that arose in *Inquire*.
- This event should also be community-building. People will hear each other's perspectives, meet congregants they don't know, and work collaboratively to describe a common vision.

Supplies

- Nametags
- Flipcharts for tables (consider using walls as well)
- Handout on table ahead of time. This could list the AI process, but also is an opportunity for the committee to lay out a short statement on how the findings will be used, and to manage expectations
- Handouts of questions (to be given out just prior to exercise)
- Microphone
- Paper and pens for each participant to take notes
- Long strips of paper and markers or crayons for each table.
- Basket for note cards

*A story is a fact, wrapped in an emotion that compels us to take an action that transforms our world.**

Imagine what TBE could look like five years from now! Temple Beth El’s strategic planning process is using the Appreciative Inquiry strength-based approach to define the future. The first step in our inquiry asked you to identify the necessary ingredients for our success. The themes we’ve heard from you to date centered around: Sense of Community, Sustainability, Worship & Rituals, Education, and Involvement in the Greater Community. Today we will draw on your collective imagination to envision “what might be”. The Strategic Planning Committee will use these possibilities to inform the development of the new TBE strategic plan.

Today’s Agenda

- | | |
|--|--|
| 1. Welcome and instructions for the day | Strategic Planning Committee |
| 2. Individual reflection on the “Imagine” Question | Take notes on your own responses. |
| 3. Table discussion of highlights | Tell each other your story of what TBE looks like in 2017; identify “big ideas” and put them up on the wall or charts. |
| 4. Develop a collective vision | Use your stories and “big ideas” to develop a picture of the future. |
| 5. Share it out | Each table presents its vision to the whole group |
| 6. Closing | Next steps for strategic planning
Rabbi Kadden closing remarks |

* Richard Maxwell and Robert Dickman, *The Elements of Persuasion*, p.5

Imagine TBE in 2017

Imagine it is five years from now, and Temple Beth El has been honored at the Union of Reform Judaism (URJ) biennial meeting with the Belin Outreach and Membership Award. TBE received the award for its innovations in engaging members and fostering a strong sense of community. In particular, the awards committee noted TBE for its welcoming atmosphere and inclusiveness. They cited comments from congregants who referred to TBE as “like a family”. They also recognized TBE’s role and strong alliances with the greater Tacoma community.

You are being interviewed for the feature story in *Reform Judaism*. What are the highlights that you want to make sure are shared in this article? What exactly is going on at Temple that characterizes the engagement and strong sense of community? Feel free to consider any of the following questions:

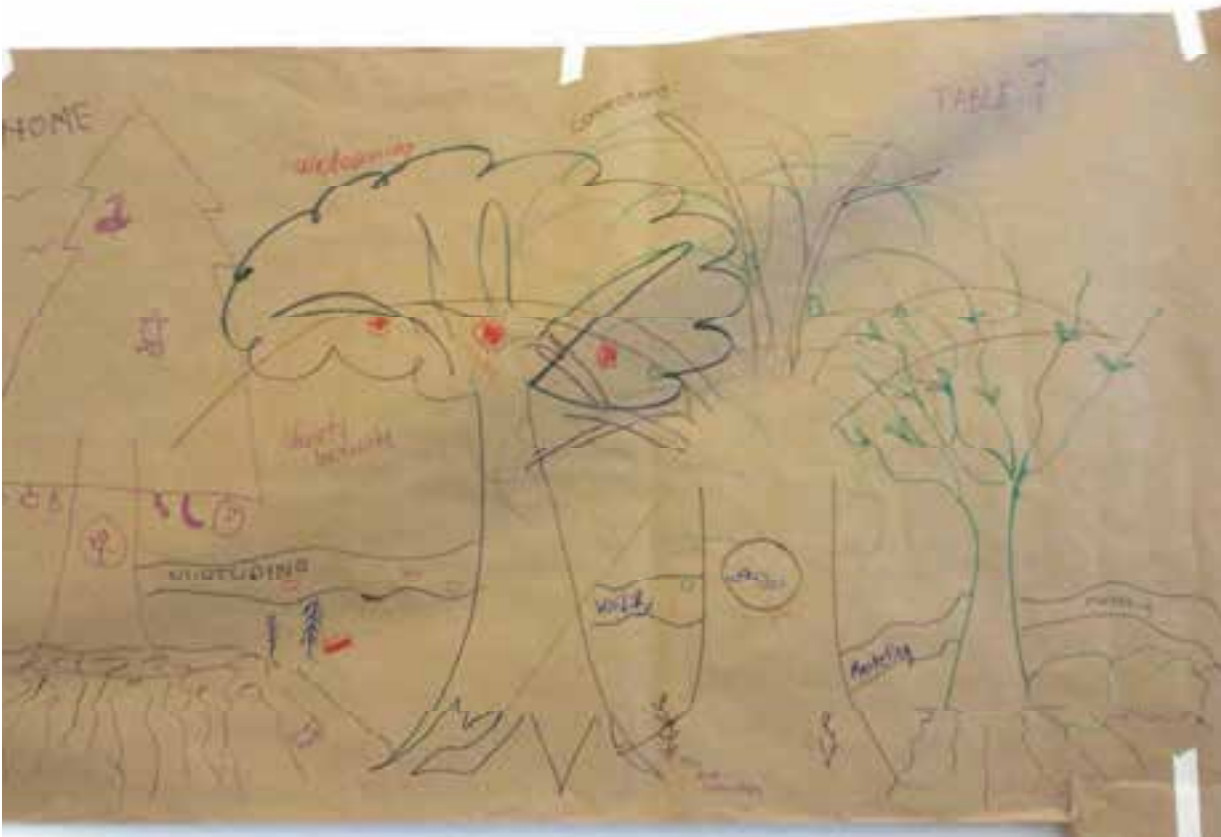
- What are the significant innovations and creative strategies that you are most proud of?
- Who is engaged? (e.g., different groups, committee members, TBE staff)
- What is the buzz in the greater Tacoma community about TBE? E.g., if someone asks you if you are affiliated with a religious institution, and you say you belong to TBE—what is their response?

Drawing Exercise

As a group:

1. Take a look at the “big ideas” you have each posted on your flipchart.
2. Now, using these ideas, and the stories you just told, work together to draw a vision of what TBE looks like in five years (2017), and how you got there. You might want to include some of the activities or milestone events that happened along the way.
3. Designate one person to share your collective vision with the whole group.

Imagine Session – June 3, 2012 – Temple Beth El



2012
 ESTABLISH A COMMITTEE TO FURTHER
 BEING Jewish Education
 PLAN for TSE
 - Education Center Investment
 - Higher Quality Standards
 - GAN Growth
 - Temple Membership - [INTERACTIVE MEMBERSHIP PROGRAMS

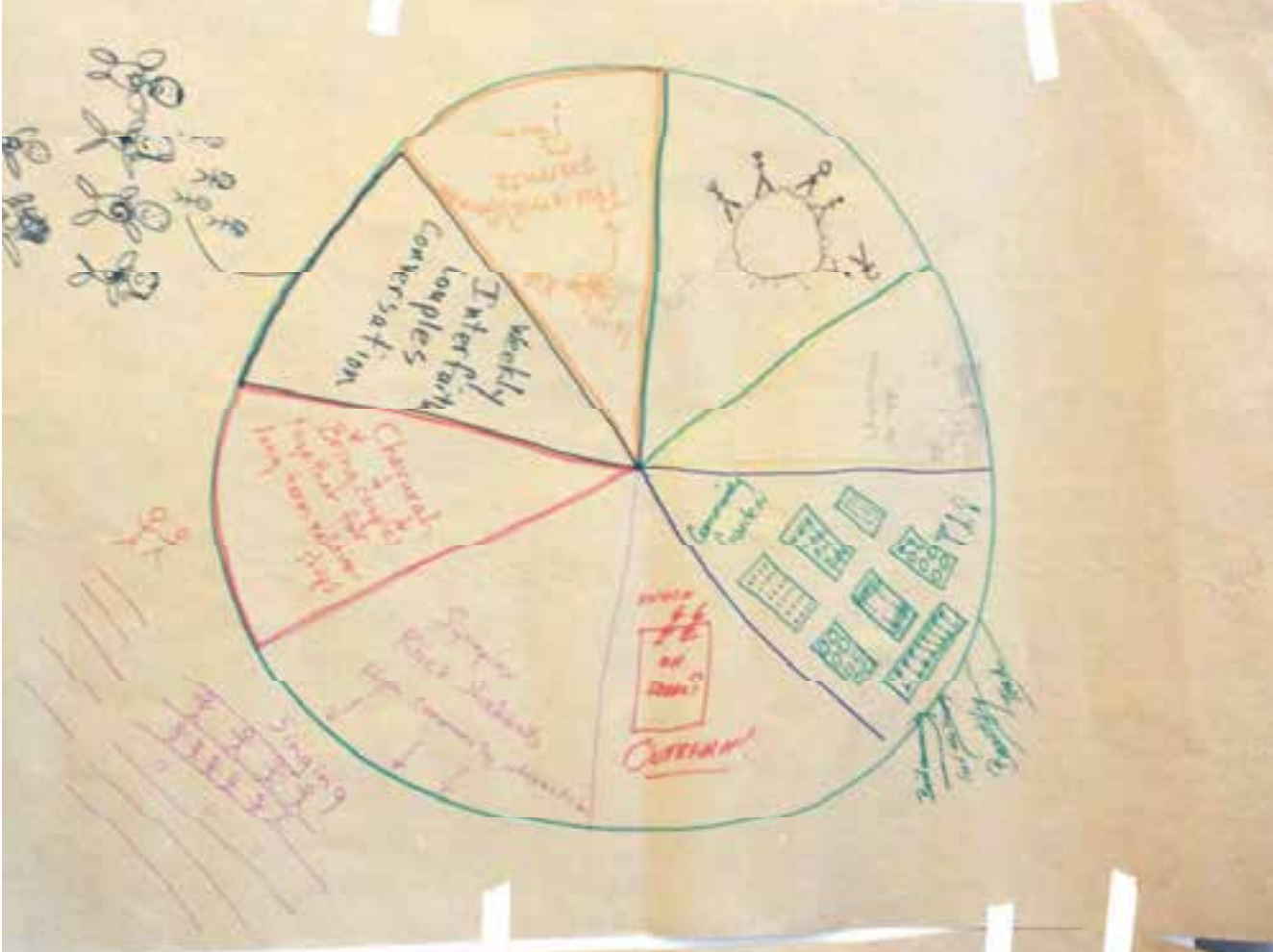
2013
 Fund Raising
 Curriculum Development
 DEVELOP BUSINESS PLANS
 INTERACTIVE MEMBERSHIP PROGRAMS

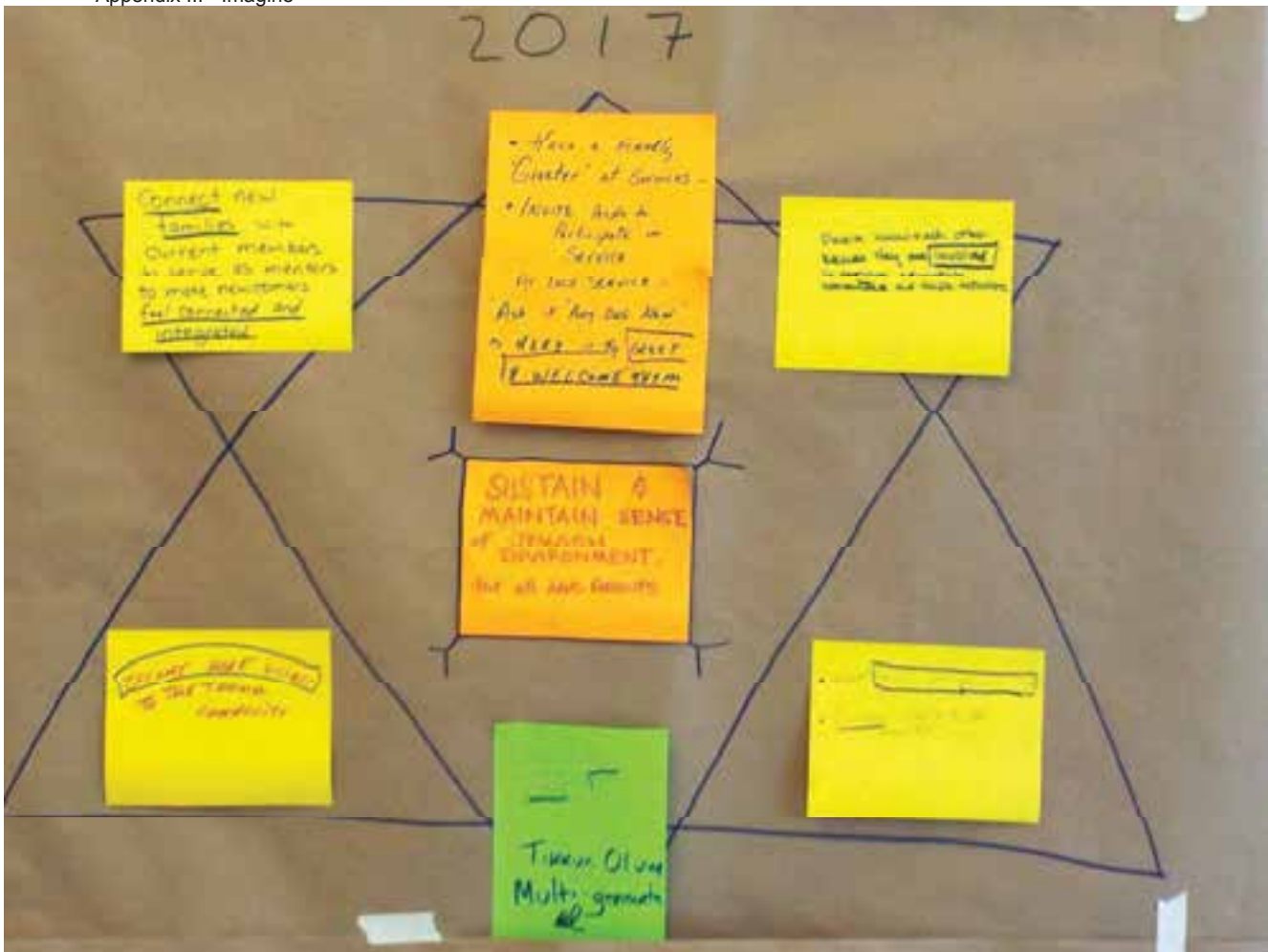
2014
 ENGAGE COMMUNITY
 SEEK DONATIONS OR SPECIFIC FUNDS FOR GAN TRANSPORTATION SYSTEM

2015 - 2016
 HIRE GAN DIRECTOR
 EXPLORE/CREATE INTERACTIVE/VIRTUAL ADULT EDUCATION MODELS
 INCREASE ADULT RITUAL PARTICIPATION
 USE SEED MONEY FROM EXISTING #

2017
 LAURENCE RELIGIOUS SCHOOL +150
 FULL DAY GAN ± 12 (AGES 3-5)
 TRANSPORTATION AVAILABLE
 SENIOR ACTIVITIES IN PLACE DAILY (TRANSPORTATION AVAIL)
 BUILDING UTILIZATION
 FAMILY RITUAL PARTICIPATION IN
 B'NAI MITZVOT
 ADULT EDUCATION BOTH IN PLACE + VIRTUAL





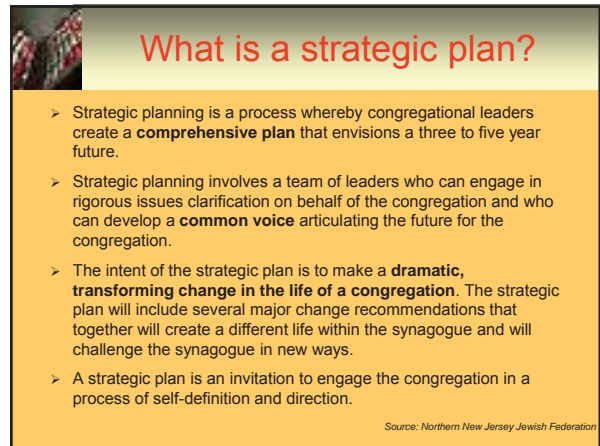


Slide show used at Innovate committee chair & board training session



Temple Beth El Strategic Planning Workshop January 13, 2013

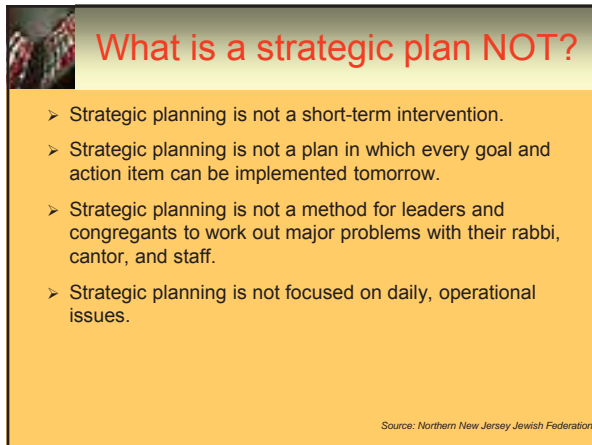
Shelley Rozen
TBE Strategic Planning Committee Chair
Carolyn Cohen
Cohen Research & Evaluation, LLC



What is a strategic plan?

- Strategic planning is a process whereby congregational leaders create a **comprehensive plan** that envisions a three to five year future.
- Strategic planning involves a team of leaders who can engage in rigorous issues clarification on behalf of the congregation and who can develop a **common voice** articulating the future for the congregation.
- The intent of the strategic plan is to make a **dramatic, transforming change in the life of a congregation**. The strategic plan will include several major change recommendations that together will create a different life within the synagogue and will challenge the synagogue in new ways.
- A strategic plan is an invitation to engage the congregation in a process of self-definition and direction.

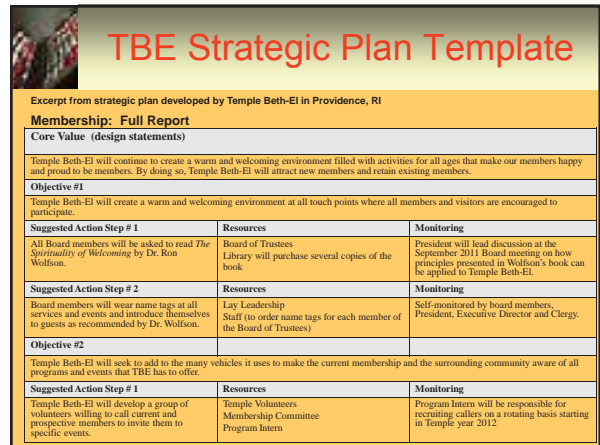
Source: Northern New Jersey Jewish Federation



What is a strategic plan NOT?

- Strategic planning is not a short-term intervention.
- Strategic planning is not a plan in which every goal and action item can be implemented tomorrow.
- Strategic planning is not a method for leaders and congregants to work out major problems with their rabbi, cantor, and staff.
- Strategic planning is not focused on daily, operational issues.

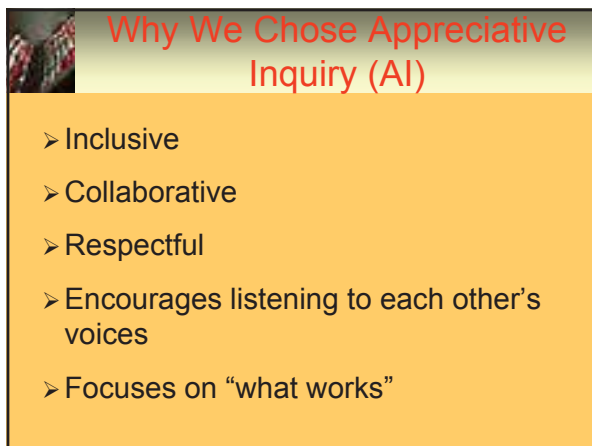
Source: Northern New Jersey Jewish Federation



TBE Strategic Plan Template

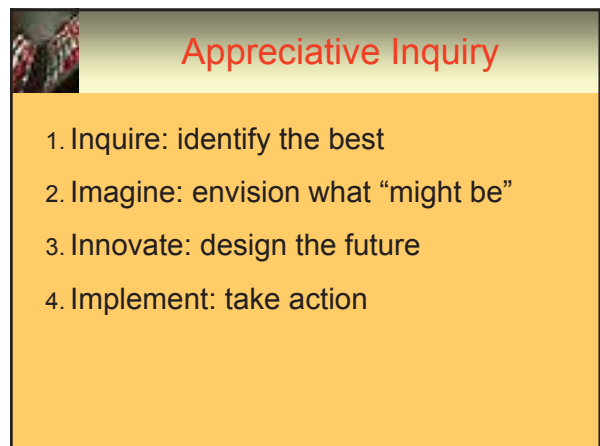
Excerpt from strategic plan developed by Temple Beth-El in Providence, RI

Membership: Full Report		
Core Value (design statements)		
Temple Beth-El will continue to create a warm and welcoming environment filled with activities for all ages that make our members happy and proud to be members. By doing so, Temple Beth-El will attract new members and retain existing members.		
Objective #1		
Temple Beth-El will create a warm and welcoming environment at all touch points where all members and visitors are encouraged to participate.		
Suggested Action Step # 1	Resources	Monitoring
All Board members will be asked to read <i>The Spirituality of Welcoming</i> by Dr. Ron Wolfson.	Board of Trustees Library will purchase several copies of the book.	President will lead discussion at the September 2011 Board meeting on how principles presented in Wolfson's book can be applied to Temple Beth-El.
Suggested Action Step # 2	Resources	Monitoring
Board members will wear name tags at all services and events and introduce themselves to guests as recommended by Dr. Wolfson.	Lay Leadership Staff (to order name tags for each member of the Board of Trustees)	Self-monitored by board members, President, Executive Director and Clergy.
Objective #2		
Temple Beth-El will seek to add to the many vehicles it uses to make the current membership and the surrounding community aware of all programs and events that TBE has to offer.		
Suggested Action Step # 1	Resources	Monitoring
Temple Beth-El will develop a group of volunteers willing to call current and prospective members to invite them to specific events.	Temple Volunteers Membership Committee Program Intern	Program Interns will be responsible for recruiting callers on a rotating basis starting in Temple year 2012



Why We Chose Appreciative Inquiry (AI)

- Inclusive
- Collaborative
- Respectful
- Encourages listening to each other's voices
- Focuses on "what works"



Appreciative Inquiry

1. Inquire: identify the best
2. Imagine: envision what "might be"
3. Innovate: design the future
4. Implement: take action

Step 1: Inquire

Describe 'peak experience' at TBE
Share wishes for Temple

- **4 congregational forums –**
 March and April 2012
 3 adult & 1 teen session (65 congregants)
- **Electronic survey** (12 congregants)

Inquire session themes

1. **SUSTAINABILITY**
2. **SENSE OF COMMUNITY**
3. **WORSHIP & RITUALS**
4. **EDUCATION**
5. **LARGER COMMUNITY (OUTSIDE OF TBE) INVOLVEMENT**

Inquire session themes


- **SENSE OF COMMUNITY -**
 Ownership within the community creates a sense of family at TBE through a welcoming, supportive, and inclusive environment.



Step 2: Imagine session



Imagine session



Imagine: Overarching Theme

CREATING CONNECTIONS & BUILDING COMMUNITY

- Community engagement
- Inclusiveness—everyone is part of the circle
- Our Jewish home
- Shared responsibility
- Visibility within larger community
- Growth



How our strategic plan fits together

Design statements will be created at 3 levels

Step 3: Innovate

Create design statements

All design statements are

- **Provocative:** Challenge the status quo
- **Grounded:** A real possibility for TBE
- **Preferred:** Desired for the future
- **Bold:** Stated affirmatively and in present tense

"Sense of community" design statements

- Temple Beth El is a **welcoming, positive, inclusive, open** community. TBE **welcomes diversity** (traditions, backgrounds, and abilities).
- Participation in small group activities and large congregational events creates **intergenerational connections** and **energy**.
- We have a community that **transcends our differences**, and comes together and stays together. Our congregation **feels like family**.

Today's Work

Create AI design statements for 3 Areas

1. Lifelong Jewish learning
2. Worship and rituals
3. Tikkun Olam

Next steps

- Strategic planning committee members team with TBE committees or function areas to create design statements for committees/functions
- Committees meet in February to create design statements
- Design statements due to strategic planning committee by beginning of March
- Strategic planning committee will incorporate design statements into strategic plan (presented to congregation at May 2013 congregational meeting)
- Committees develop objectives and action plans to further design statements by May 2014
- Periodic check-ins by strategic planning committee and board

Next steps

January 2013	February	March	April	May
<ul style="list-style-type: none"> - January 13th: board, committee chairs, SP committee members learn how to create design statements - SP committee members sign up to work with individual committees 	<ul style="list-style-type: none"> - Committees or function areas meet with SP committee member in attendance to develop design statements 	<ul style="list-style-type: none"> - Committees may begin to develop objectives & action steps - SP committee works on written strategic plan 	<ul style="list-style-type: none"> - SP committee works on written strategic plan & finishes first draft - Plan presented to board before monthly board meeting - Changes & suggestions go back to SP committee 	<ul style="list-style-type: none"> - SP committee finishes final draft of plan - Plan presented to congregation at annual meeting May 21st - Jewish Federation report written - SP committee decides on follow-up

Innovate Committee Chair Training - Design Statement Instructions: Worship and Rituals

Please develop at least one “design statement”. You are welcome to develop more if you wish. The design statement describes your vision about what should happen in a particular strategic priority area (lifelong Jewish learning, ritual and worship, tikkun olam). As you develop your statements, please keep in mind the overarching congregation-wide design statements for “building community and creating connections”:

- Temple Beth El is a welcoming, positive, inclusive, open community. TBE welcomes diversity (traditions, backgrounds, and abilities).
- Participation in small group activities and large congregational events creates intergenerational connections and energy.
- We have a community that transcends our differences, and comes together and stays together. Our congregation feels like family.

Each design statement should meet the following four criteria:

1. **Provocative:** Challenges the status quo
2. **Grounded:** A real possibility for TBE.
3. **Preferred:** Desired for the future
4. **Bold:** Stated affirmatively and in the present tense

If your group has time, please also develop some objectives related to one of your design statements. The objectives are broad statements of what is needed in order to reach the vision expressed in your design statement. (You can see examples in the handout from the Rhode Island temple).

A later step in the strategic planning process will be developing action steps tied to specific objectives. We will not be working with action steps today. They are simply provided as an example of a finer level of detail that will be addressed in the future.

Here are some responses related to your planning area which were derived from the TBE Appreciative Inquiry process to date. We have sorted congregant feedback into language relating to design statements, objectives, and action steps. These findings are shared in the interest of informing your work in developing design statements and objectives.

Worship and Rituals

Language that could be included in Design Statements

TBE creates opportunities for innovative worship that involve people of all ages

Language that could be included in Objectives

- Provide opportunities for supportive and celebratory rituals
- Creativity with services and events
- More congregational participation

Information that could inform development of Action Steps. These are shared as examples of strategic planning work that will take place once Design Statements and Objectives are finalized. Please do not go to this level of detail today.

- Music, instruments, yoga, meditation
- Pizza, dancing
- B’nai mitzvah attend on Sat mornings, student involvement on Sat mornings
- Children’s choir, creative outlets for kids
- Rock Shabbat
- Services at the beach in summer

Innovate Committee Chair Training - Design Statement Instructions: Tikkun Olam

Please develop at least one “design statement”. You are welcome to develop more if you wish. The design statement describes your vision about what should happen in a particular strategic priority area (lifelong Jewish learning, ritual and worship, tikkun olam). As you develop your statements, please keep in mind the overarching congregation-wide design statements for “building community and creating connections”:

- Temple Beth El is a welcoming, positive, inclusive, open community. TBE welcomes diversity (traditions, backgrounds, and abilities).
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Tikkun OlamLanguage that could be included in Design Statements

TBE offers opportunities for tikkun olam and opportunities for interactive programs within the larger community
 Be a Jewish presence in the community
 TBE values its connections to the larger community

Language that could be included in Objectives

- Our members and their contributions are valued by the larger Tacoma-Pierce County Community
- We build strategic alliances with different groups that have shaped Tacoma
- Good interaction with greater community
- Engage the broader community—secular Jews and nonJews
- Bring the larger Pierce County to us, and us to the community
- Help people outside the Jewish or local community

Information that could inform development of Action Steps . These are shared as examples of strategic planning work that will take place once Design Statements and Objectives are finalized. Please do not go to this level of detail today.

- Tutoring/needdy
- Mitzvah Day
- Involvement with other Temples
- Events within TBE and in larger community

Innovate Committee Chair Training - Design Statement Instructions: Lifelong Jewish Learning

Please develop at least one “design statement”. You are welcome to develop more if you wish. The design statement describes your vision about what should happen in a particular strategic priority area (lifelong Jewish learning, ritual and worship, tikkun olam). As you develop your statements, please keep in mind the overarching congregation-wide design statements for “building community and creating connections”:

- Temple Beth El is a welcoming, positive, inclusive, open community. TBE welcomes diversity (traditions, backgrounds, and abilities).
- Participation in small group activities and large congregational events creates intergenerational connections and energy.
- We have a community that transcends our differences, and comes together and stays together. Our congregation feels like family.

Each design statement should meet the following four criteria:

1. **Provocative:** Challenges the status quo
2. **Grounded:** A real possibility for TBE.
3. **Preferred:** Desired for the future
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If your group has time, please also develop some objectives related to one of your design statements. The objectives are broad statements of what is needed in order to reach the vision expressed in your design statement. (You can see examples in the handout from the Rhode Island temple).

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Lifelong Jewish Learning

Language that could be included in Design Statements

Lifelong learning and connecting people through formal and informal education are important at TBE while creating a variety of creative avenues to learn.

Language that could be included in Objectives

- Continuity of programs for very young to very old
- Larger market drawing people in
- Learning the why of Judaism

Information that could inform development of Action Steps. These are shared as examples of strategic planning work that will take place once Design Statements and Objectives are finalized. Please do not go to this level of detail today.

- Re-establish Gan
- Day camp, summer programs
- More extracurricular activities, cooking, art, dance etc.
- Hebrew High time change
- Conversational Hebrew, Advanced Hebrew
- Torah study during week
- Continuing education on Sunday mornings, adult forum.

Temple Beth El strategic planning process winter/spring 2013
Strategic planning committee assignments and committee contact info
 (We used this form to facilitate the *Innovate* stage of our AI process)

Functional area	Committee	Chair	Contact info for chairs (phone & email)	Usual meeting day & time	Will meet singly or with other committees in function area?	Strategic planning committee members already on committee	Strategic planning committee member who will help lead process with contact info	Meeting date(s) to work on design statements
Facility	Building & Grounds				Singly			
Office & Personnel	Office & Personnel				Singly			
Bylaws	Bylaws				Singly			
Board Development	Nominating				Singly			
Membership	Membership				Singly			
Fund Development	Fundraising*				Function area			
	Legacy							
	Endowment							
Tikkun Olam	Tikkun Olam				Singly			
Education	Religious Education*				Function area			
	Adult Education							
	Scholarships							
	Ritual							
Finance	Budget & Finance*				Function area			
	Investment							

* Lead committee for each functional area

Please report back to Shelley Rozen, Strategic Planning Committee Chair, when your meeting has been scheduled. Please send design statements to Shelley by the end of February. Shelley is also available to provide any additional help or to answer questions.

**Working with Temple Beth El Committees
Strategic Planning Process
Suggestions for agenda and how to use resources**

Goal for this meeting: To develop design statements and objectives for your committee or functional area that support the overarching theme (Building Community & Creating Connections) and will guide the work of your committee over the next five years

Agenda Item	Suggested time	Objective for this part of the agenda	Person(s) responsible	Documents available as resources
<p>Brief overview of Appreciative Inquiry (AI):</p> <ul style="list-style-type: none"> • We chose AI because it is inclusive, collaborative, and focuses on what works • 10 assumptions about AI • 4 steps—Inquire, imagine, innovate, implement 	10 minutes	All committee members present understand the basics of Appreciate Inquiry and its value.	Strategic planning committee (SPC) member assigned to your committee	<ul style="list-style-type: none"> • PowerPoint: Slides 2-3 • AI list of 10 assumptions from <i>Memories, Hopes & Conversations</i> (MH&C)
<p>Overview of TBE’s strategic planning process to date:</p> <ul style="list-style-type: none"> • Inquire (asking questions about peak experiences)—March & April 2012 congregational forums • Imagine (imagining TBE’s future in 5 years)—June 2012 forum • Innovate (creating strategic plan, beginning with design statements & objectives)—January 2013 session & today’s meeting 	10 minutes	All committee members present understand TBE’s strategic planning process to date and how their meeting today fits into the process.	Committee chair and SPC member	
<p>Review themes developed at Inquire and Imagine sessions, including overarching theme (Building Community & Creating Connections)</p>	20 minutes	Committee uses this information as a foundation for today’s work.	SPC member	<ul style="list-style-type: none"> • PowerPoint: Slides 4-5 • TBE summary of inquire themes • Imagine session posters • Overview of posters
<p>Review 4 criteria for design statements: provocative, grounded, preferred, and bold</p>	5 minutes	Committee members understand what makes a good design statement.	Committee chair	<ul style="list-style-type: none"> • PowerPoint: Slide 6 • Provocative proposals (design statements) info from MH&C
<p>Review TBE design statements created to date; have committee members discuss one of the design statements for the overarching theme and how it fits the 4 criteria for design statements</p>	10 minutes	Committee members are able to articulate what makes a good design statement. Committee members understand how committee work fits into strategic plan.	Committee chair and SPC member	<ul style="list-style-type: none"> • Design statements as of 1-13-13 • PowerPoint: Slides 7-12

Agenda Item	Suggested time	Objective for this part of the agenda	Person(s) responsible	Documents available as resources
Create design statements to support overarching theme (building community & creating connections—focus on “engagement” as much as possible) and themes related to your committee from the Inquire & Imagine sessions	40 minutes	Committee creates design statements to guide work of this committee or area of TBE for next 5 years. Committee members understand how design statements will work in strategic plan (design statements will be supported by objectives and action steps).	Committee chair, SPC member, committee members	<ul style="list-style-type: none"> • Design statement worksheet • Design statement instructions • Beth-El RI strategic plan (look for the section that most closely resembles the work of your committee—note that the RI temple calls design statements “core values”)—we are using the Rhode Island plan as our template • PowerPoint: Slides 12-13
Create objectives (objectives are broad statements of what is needed in order to reach the vision expressed in your design statements)— <i>objectives are not action steps</i>	20 minutes	Committee determines what needs to happen to support achievement of design statements in five years.	Committee chair, SPC member, committee members	<ul style="list-style-type: none"> • Design statement instructions • Design statement worksheet • Beth-El RI strategic plan (look for the section that most closely resembles the work of your committee)
If time, begin creating large action steps (optional for today—you will be working on creating these over the next year)	?		Committee chair, SPC member, committee members	<ul style="list-style-type: none"> • Beth-El RI strategic plan (look for the section that most closely resembles the work of your committee)
Next steps and thank you for participating	5 minutes		SPC member	<ul style="list-style-type: none"> • PowerPoint: Slides 14-15