



**Temple Beth El  
Tacoma, Washington**

**2013-2018 Strategic Plan**

**Table of Contents**

Remarks from Rabbi Kadden and Cantor Elstein.....4  
Remarks from Jim Friedman, Congregation President .....4  
Report from the TBE Strategic Planning Committee .....4  
Design Statement Goals & Objectives from TBE Committees .....14  
*Building and Grounds Committee*.....15  
*Education Functional Area: Religious Education Committee, Adult Education Committee,  
Scholarship Committee* .....17  
*Finance Functional Area: Budget & Finance Committee, Investment Committee, Legacy  
Committee* .....18  
*Fund Development Functional Area: Fundraising Committee and Endowment Committee* .....19  
*Membership Committee* .....20  
*Nominating/Leadership Development Committee* .....21  
*Personnel Committee* .....22  
*Temple Beth El Staff*.....22  
*Ritual Committee*.....23  
*Tikkun Olam Committee*.....24  
Appendices.....25

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## Remarks from Rabbi Kadden and Cantor Elstein

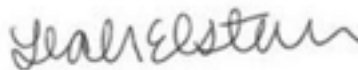
As your clergy, we have been inspired to participate in Temple Beth El's strategic planning process. We are delighted that so many of you took the time to attend one of the meetings and share your thoughts about our congregation and our future. It is wonderful that we have so many people who truly care about our community and want to see it prosper.

We are also grateful to have worked with a dedicated committee which designed the process, selected "Appreciative Inquiry" as the best approach, met with Temple committees to develop "design statements" and objectives, and created this document which will guide our congregation for the next five years.

This strategic plan envisions an exciting future for our community. But now it is up to us to turn these words into a reality by creating action steps and implementing those action steps to achieve the objectives and realize the design statements. We look forward to working with all of you to fulfill our overarching theme of "*Building Community and Creating Connections*," and create a vibrant, caring Temple family through Torah (study), *avodah* (worship), and *g'milut chasadim* (acts of kindness).



Bruce Kadden  
Rabbi



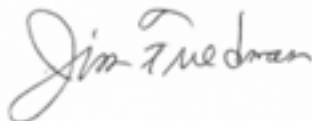
Leah Elstein  
Cantor/Director of Education

## Remarks from Jim Friedman, Congregation President

Many of you as members of the Temple Beth El family community have been involved with the process of developing this five-year strategic plan for Temple Beth El. You may have attended one of the Appreciative Inquiry sessions hosted by the strategic planning committee, including the community forums we held for the *Inquire* and *Imagine* steps, and/or the leadership training event we held for the *Innovate* step. The results of these sessions and the input we received from you have been used to develop specific forward-thinking action steps for Temple Beth El's committees and staff.

If you have been at any of the last three congregational meetings, you have heard explanations of the strategic process and significant benchmarks that have been accomplished in the strategic plan process. Contained in this strategic plan document is the blueprint of where we go from here. This is what is referred to as a *living document*. This means there will be new ideas and design statements that will be added as we accomplish the goals, objectives, and action steps outlined here.

I want to express my sincere appreciation to all of you for your participation and dedication to this process. Also, a huge thank you goes to all the members of the strategic planning committee, listed on the next page, for their unending commitment to creating our strategic plan.



Jim Friedman  
President, Temple Beth El Board of Trustees

## Report from the TBE Strategic Planning Committee

In 2011, the Temple Beth El Board of Trustees voted to form a committee to create a long-range plan for Temple Beth El (TBE). The 2010-12 president of the congregation, Kate Haas, announced the board's plan at the May 2011 congregational meeting. Long-time TBE congregant Shelley Rozen, a grantwriter and consultant to nonprofit organizations, volunteered to lead the committee, which met for the first time in August 2011.

The committee consisted of the following individuals, and included current and past TBE board members, current and past TBE presidents, both of TBE's clergy, a teen representative, and congregants with extensive experience in nonprofit organizations, business, and education:

Dave Alber	Sophia Keskey
Jacob Elstein	John Lasky
Cantor Leah Elstein	Suzanne Leichman
Jim Friedman	Andy Levine
Kate Haas	Lenny Reisberg
Jodi Herchold	Shelley Rozen
Rabbi Bruce Kadden	

The committee examined a number of different planning models during the fall of 2011, including the traditional SWOT (strengths, weaknesses, opportunities, and threats) approach, and elected to focus on a strength-based process called Appreciative Inquiry (AI). AI differs from other models in that it focuses on the positive and involves many contributors to the process. While AI has been used with success in corporations, non-profit organizations, and churches, there was little precedent for using the process in synagogues.

The strategic planning committee chose Appreciative Inquiry for our process because members felt that the model would fit well with what we wanted to accomplish. In particular, we were attracted to AI for the following reasons:

- It is an inclusive process.
- It is a model that is collaborative.
- The process is respectful.
- It encourages listening to each other's voices.
- Appreciative Inquiry focuses on "what works."

To fund the committee's efforts, we submitted a grant proposal to the Jewish Federation of Greater Seattle in fall 2011 for their "Small and Simple" grant opportunity. In the proposal, we promised to disseminate the results of our foray into Appreciative Inquiry and to serve as resource people for other congregations wishing to investigate Appreciative Inquiry themselves. The proposal was successful, and we were awarded \$5,000 to hire a consultant who specialized in Appreciative Inquiry. This amount took us through the first step of our process. (The TBE board of trustees later allocated an additional \$1,700 to the committee to complete the second step.)

Committee Chair Shelley Rozen spoke with three different consultants, and the committee elected to contract with Carolyn Cohen of Cohen Research & Evaluation, LLC, in Seattle. Carolyn's work includes evaluations of K-16 academic and vocational education programs, community partnerships, volunteer endeavors, and civic capacity-building efforts. She was first introduced to Appreciative Inquiry in 2003,



Larger community (outside TBE) involvement	TBE offers opportunities for tikkun olam, and opportunities for interactive programs within the larger community.
Sense of community	Ownership within the community creates a sense of family at TBE through a welcoming, supportive, and inclusive environment.

By far, the concept that came up most frequently in the peak experiences and wishes was that of “community.” Because of this, we chose the “sense of community” theme to guide the next stage of the process: *Imagine*.

**Step 2: Imagine**

For the *Imagine* step of our process, we held an all-congregation forum for adults and teenagers in June 2012. Sixty congregants aged 12 to 85 attended the forum, working in multi-generational small groups to create a description of Temple Beth El in five years. The strategic planning committee developed a seating chart in advance to ensure that each table had a balanced and diverse group. We split up spouses and other family members to encourage conversations with new people.



Facilitated by Carolyn Cohen and members of the strategic planning committee, each group came up with a shared vision for Temple Beth El in 2018, and then communicated that vision with the whole group graphically and verbally. Discussion was focused on the themes articulated at the *Inquire* events, particularly “sense of community.” The purpose was to work together to create visions grounded in past successes.



Seven posters were created that illustrated the “sense of community” theme. While the style of the posters varied widely from group to group, there were a number of common concepts:

- Community engagement
- Inclusiveness
- Our Jewish home
- Shared responsibility
- Visibility within larger community
- Growth

One of the most repeated common concepts was that of an inclusive community, with posters using pie

charts, circles, and a Star of David to frame groups' visions. Another repeated concept was the idea of growth and the portrayal of our congregation as a living entity. Posters included flowers, trees, and community gardens.

In the fall of 2012, the strategic planning committee examined the themes and visions from the *Inquire* and *Imagine* steps and created an overarching theme to guide our strategic plan: *Building Community and Creating Connections*. From there, based on the overarching theme and the results of all the congregational forums, we created several overarching 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**.

The bolded words and phrases are those we heard most often in the Inquire and Imagine forums.

Design statements, also called “provocative proposals” or “provocative propositions” in some Appreciative Inquiry literature, are bold goals for the community that are stated in present tense and describe our vision of Temple Beth El in five years. Design statements must 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.

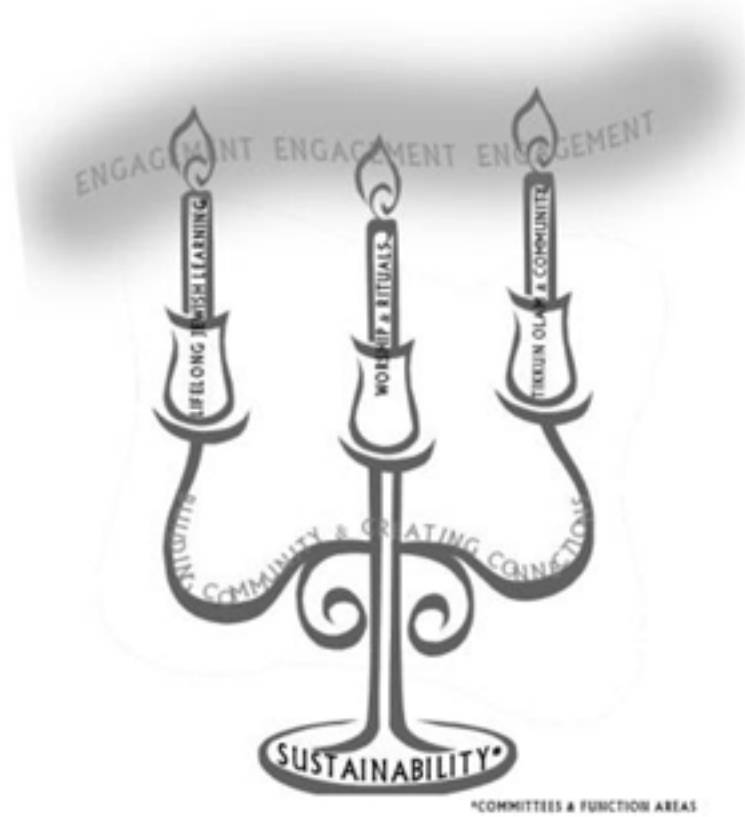
We used the overarching theme and our overarching design statements to inform our next step: *Innovate*.

### **Step 3: Innovate**

Step 3 of the Appreciative Inquiry process, *Innovate*, is where we actually created our strategic plan. To facilitate this, we applied for and received an additional grant of \$1,000 from the Jewish Federation of Greater Seattle, which was then matched by the TBE Board of Trustees. The funds enabled us to once again hire AI consultant, Carolyn Cohen.

Carolyn worked closely with Committee Chair Shelley Rozen to develop an experiential training session for Temple Beth El leadership, including clergy, committee chairs, board members, and strategic planning committee members. The session was held in January 2013 and was attended by approximately 30 individuals.

To illustrate how the committees' work, the overarching theme, and Temple Beth El's traditional strategic priority areas fit together, Strategic Planning Committee Chair Shelley Rozen created the following candelabra graphic.



1. Base of candelabra: The work of TBE’s committees forms the foundation of our plan; design statements, goals, and objectives at the committee level give TBE the tools to do what we do.

2. Support for candles: The work of the committees supports the overarching theme—*building community and creating connections*. Everything we do—including budget and finance, maintenance and improvement of our building, the work of the front office, membership, and our other work—will strive to *build community and create connections*.

3. Candles: These three areas—stated here at “lifelong Jewish learning, worship and rituals, and tikkun olam”—are the visible work of TBE: the candles supported by the work of the committees and the overarching theme.

4. Air: Vital to the work we do is the concept of engagement. At our *Inquire* and *Imagine* sessions, we heard over and over the importance of engaging congregants with each other, and with education, services, programs,

and the community. Engagement is the vital oxygen that keeps the flames burning.

At the January 2013 leadership training session, attendees worked together in three groups to develop design statements and objectives for each of these strategic priority areas we identified as key to Temple Beth El and to being a Jewish congregation: lifelong Jewish learning, worship and rituals, and tikkun olam. (Since these design statements and objectives were incorporated into the design statements for the committees related to each of these areas, we have not included them in this report.)

The learnings from the *Innovate* leadership training session were then applied to the work of individual committees. Each strategic planning committee member teamed up with one or more of Temple Beth El’s committees to help develop design statements and objectives for that committee’s work. Strategic planning committee members and committee chairs were provided with a number of written resources from the strategic planning committee chair, as well as individual consultation when requested.

Because some committees are closely aligned, several of the committees met in groups defined by functional area. These included the education area (comprised of the religious education committee, adult education committee, and scholarship committee); the finance area (budget & finance committee, investment committee, and legacy committee); and the fund development area (comprised of the fundraising committee and the endowment committee). All Temple Beth El committees participated in this *Innovate* process (with the exception of the bylaws committee, which has a very narrowly defined



function), and met 1-3 times to develop design statements and objectives for their committee or area. In some cases, the strategic planning committee asked committees to revise their design statements and objectives, and in other cases, committees' work was accepted as written. At the request of one committee that was struggling with the process, the strategic planning committee significantly revised that committee's design statements and objectives. TBE staff also met as a group and created their own design statements and objectives.

Many of the design statements and objectives created by the committees are quite transformative, and we anticipate that much of the work we do over the next five years will look very different from what we do today. Design statements are listed below, and all design statements and objectives may be found on pages 13 to 23. Most of the committees' design statements and objectives relate directly to the overarching theme and overarching design statements.

*Overarching Theme: Building Community and Creating Connections*

*Overarching Design Statements for Temple Beth El*

- 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.

*Building and Grounds Committee Design Statements*

1. Because Temple Beth El's building and grounds are effectively and efficiently managed, we are financially stable and enjoy continued congregational growth.
2. Use of the Temple Beth El facility and grounds is maximized, supports congregants throughout the lifespan, and also brings in members of the larger community.
3. Temple Beth El's building and grounds create a safe, secure, and welcoming environment.

*Education Functional Area Design Statements*

1. Through communal learning, the Temple Beth El family forges connections (kehillah), provides inspiration (kedushah), and strengthens both itself and the larger Jewish community throughout the journey from birth to death.
2. Temple Beth El is a welcoming center of Jewish learning for all individuals in our regional community.

*Finance Functional Area Design Statements*

1. We recognize and embrace that solid finances are a foundation of a vibrant and growing community.
2. Temple Beth El's financial management is clear, transparent, and accountable to our membership.
3. The legacy program and giving for endowment purposes is actively promoted and has been embraced by our membership.
4. Our budget is comprised primarily of sustainable income sources.

#### *Fund Development Functional Area Design Statements*

1. We have a culture of giving and tzedakah at Temple Beth El.
2. Fundraisers are events that deepen connections with people.

#### *Membership Committee Design Statements*

1. Temple Beth El welcomes people of all ages and backgrounds.
2. Temple Beth El encourages and supports individuals and families to become members of our congregation.
3. Temple Beth El creates an environment of belonging which encourages ownership and a strong personal Jewish identity.

#### *Nominating/Leadership Development Committee Design Statements*

1. Temple Beth El has a culture of involvement. We recognize that within an individual, leadership is a developmental process, and TBE's Nominating/Leadership Development Committee supports that process. We have a proactive, ongoing process of leadership development that identifies, orients, and trains new leadership at Temple Beth El.
2. The Nominating/Leadership Development Committee performs its duties on a year-round, ongoing basis. We are a diverse committee that recruits a diverse group of leaders that is broadly representational of the current and future Temple Beth El community.

(Note: As a result of this strategic planning process, the nominating committee, which traditionally has met for a limited time each year only to recruit potential board members, decided to change their name and broaden their focus. The new "leadership development committee" will now meet throughout the year and focus on leadership development on multiple levels.)

#### *Personnel Committee Design Statement*

1. Temple Beth El's personnel committee provides oversight that insures that building community and creating connections are the foundational components of the job responsibilities of all Temple personnel.

#### *Ritual Committee Design Statements*

1. Temple Beth El offers worship experiences which reflect both an appreciation of tradition and innovation.
2. Temple Beth El's approach to worship and ritual encourages active participation in services, nurtures religious journeys, fosters relationships among community members, and deepens connections to Torah and the Jewish people.

#### *Tikkun Olam Committee Design Statements*

1. Looking inward: Everyone who interacts with Temple Beth El feels part of our loving family.
2. Looking outward: Temple Beth El creates opportunities of social justice to inspire and engage the community in repairing the world.

#### *TBE Staff Design Statement*

1. Temple Beth El is a welcoming, positive, inclusive, open community. Temple Beth El welcomes diversity.

(Note: Temple Beth El's tikkun olam committee encompasses areas often addressed by two different synagogue committees: care for congregants and social justice. The design statements above reflect this dual focus.)

#### **Step 4: Implement**

The final step of the Appreciative Inquiry process is *Implement*. While the strategic planning committee's assigned task was completed at the close of the *Innovate* stage in May 2013, we worked with clergy and board leadership in the spring of 2013 to restructure the annual congregational meeting and we created recommendations for implementing the plan and institutionalizing the process.

##### *Individual participation in the overarching theme*

As a result of our input into the development of the May 2013 annual congregational meeting when we presented the strategic plan to the congregation, we began to implement the overarching theme at the meeting itself. Our annual meetings are typically rather mundane events held in the sanctuary. This year, in order to *build community and create connections*, we moved the meeting to the social hall, where participants could sit at round tables and interact with one another. In addition, we provided food and free babysitting, and the upbeat program included music and a slide presentation.

At the congregational meeting, we created opportunities for members to participate in the implementation of the strategic plan on an individual level. To do this, we asked those in attendance to think about 1-3 things they could do personally to help *build community and create connections*. Using Post-It notes, congregants affixed their personal commitments to the overarching theme to a large poster which will hang in the entryway rotunda of the synagogue from May through the high holidays. In addition, congregants wrote their personal commitments on a postcard provided by the strategic planning committee (attendees self-addressed the postcard). In September, immediately before the high holidays, TBE office staff will mail the postcards to each individual who created one. At the congregational meeting, we also had sign-up sheets available for each committee so that interested attendees could become involved in any parts of the strategic plan they found interesting.

##### *Recommendations from the strategic planning committee for institutionalizing the strategic plan*

Our recommendations to the Temple Beth El Board of Trustees for the institutionalization of the strategic plan include the following:

- The board should provide continuous oversight for the implementation of the strategic plan. A specific individual on the board, perhaps the vice president, should coordinate the process. The committees can be asked to report monthly or quarterly on their progress toward the strategic plan; this reporting (using the structure of design statements, objectives, and action steps) could perhaps take the place of the monthly reports the committees currently provide to the board.
- Because we ran out of time, we were not able to ask the committees to come up with the action steps they will take to reach their objectives. We recommend that the board ask each committee to come up with action steps in the fall of 2013 to guide their committee's work for the rest of the July 2013-June 2014 fiscal year. Prior to the May 2014 congregational meeting, we recommend that the committees develop action steps for the 2014-15 fiscal year. At the May 2014 meeting (and at subsequent annual meetings), committees should be encouraged to structure their annual reports in two parts: 1) a report on their progress toward meeting the objectives in their strategic plans, and an outline of the action steps they took to work toward their objectives, and 2) a plan for the action steps they will take in the upcoming 2014-15 fiscal year.

- One of the interesting outcomes of the committee design statement creation process was that different committees came up with a number of overlapping design statements and objectives. The strategic planning committee feels that this is a strength, and that committees should be encouraged to work together on shared objectives and projects rather than working independently on the same—or similar—issues.
- To help manage the process, we recommend that the board investigate Collective Impact, which is a collaborative framework recently introduced in the *Stanford Social Innovation Review (SSIR)*. Collective Impact can help to facilitate multiple nonprofit organizations working together in a city to address social problems and effect change. According to the *SSIR*, the five conditions of Collective Impact include a common agenda and shared vision for change, shared measurement that is consistent across all groups, mutually reinforcing activities and plan of action, continuous and open communication, and coordinating backbone support from a separate organization. If our TBE committees take the place of the nonprofit organizations in this model, the synagogue stands in for a city, and the board serves as the backbone organization and coordinates the whole process, the model presents some interesting possibilities.

#### *Additional recommendations*

After reviewing the TBE committees’ design statements and objectives, the strategic planning committee realized that many of them contain three consistent attributes:

- a) Wise utilization of resources.
- b) Leadership development.
- c) Use of available technological resources.

The strategic planning committee recommends that all committees incorporate these attributes in their strategic plans, in addition to focusing on the overarching theme of *Building Community and Creating Connections*.

In an earlier discussion of the use of technology, we looked at the evolution of communication at TBE over the years, including the welcome addition of technology. In the ensuing discussion about “high tech” approaches vs. “high touch” more personal approaches, one of our members coined a new term that could be considered in the future at Temple Beth El: “chai tech.” “Chai tech” would incorporate the best of “high tech” and “high touch,” and do so in a uniquely Jewish environment.

In addition, at one of our earlier meetings following the Inquire and Imagine sessions, the strategic planning committee discussed the need for increased communication and connections between individual congregants. While TBE staff, clergy, and lay leaders do a very good job of communicating with congregants, it is communication *between* congregants that is lacking. We recommend that TBE address this in a purposeful way.

*Respectfully submitted,*

*Temple Beth El Strategic Planning Committee  
Shelley Rozen, Chair*

*May 2013*

# Design Statement Goals & Objectives from TBE Committees

## *Introduction to TBE's design statements and objectives*

On the following pages are design statements and objectives from each of Temple Beth El's committees or functional areas (groups of committees). The design statements and objectives were created during the first half of 2013 and describe each committee's vision of what Temple Beth El will look like in 2018. As they were creating their design statements, the committees were asked to keep in mind Temple Beth El's overarching theme, which came out of the 2012 *Inquire and Imagine* congregational forums: *Building Community and Creating Connections*. Each committee's design statements and objectives form the strategic plan for that committee, and taken as a whole, form the strategic plan for Temple Beth El.

While design statements (also called "provocative proposals" or "provocative propositions") are similar to goals, they have been written to meet four criteria, and they are

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.

Some of the committees have also included the action steps they will take to reach their objectives. Committees will develop additional action steps later in 2013 for the 2013-14 fiscal year. Beginning in spring 2014, each committee will be asked to update their objectives and action steps, report on their progress toward their design statements and objectives, and create new action steps for the coming fiscal year.

In addition to each committee creating design statements, the Strategic Planning Committee also creating overarching design statements for the congregation based on the overarching theme of *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.

*Thank you to Temple Beth El in Providence, Rhode Island, whose strategic plan structure we adopted.*

## *Building and Grounds Committee* Strategic Plan

<b>DESIGN STATEMENT 1</b>		
Because Temple Beth El's building and grounds are effectively and efficiently managed, we are financially stable and enjoy continued congregational growth.		
<b>Objective 1</b> We focus on preventative maintenance whenever possible.		
<b>Objective 2</b> The Building and Grounds Committee is filled with knowledgeable and passionate people who work closely with TBE staff.		
<b>Action Step #1</b> Step up recruitment for committee members in order to grow the committee to 6-8 people.	<b>Resources / Who is responsible</b>	<b>Monitoring / Dates</b>
<b>Action Step #2</b> Meet quarterly to review TBE's building and grounds, the strategic plan, and any issues that have arisen.	<b>Resources / Who is responsible</b>	<b>Monitoring / Dates</b>
<b>Action Step #3</b> Meet annually with the TBE administrator.	<b>Resources / Who is responsible</b>	<b>Monitoring / Dates</b>
<b>Objective 3</b> Clear, accurate, and accessible records are kept of building/grounds repair, maintenance, construction, and growth.		
<b>Action Step #1</b> Consider use of cloud storage for these records.	<b>Resources / Who is responsible</b>	<b>Monitoring / Dates</b>
<b>Objective 4</b> The Building and Grounds Committee works with other TBE committees to explore facility updating/expansion to support Temple Beth El growth opportunities.		
<b>DESIGN STATEMENT 2</b>		
Use of the Temple Beth El facility and grounds is maximized, supports congregants throughout the lifespan, and also brings in members of the larger community.		
<b>Objective 1</b> Temple Beth El is a resource for meeting emergent and important community needs at our facility.		
<b>Action Step #1</b> Examine the feasibility of using the TBE facility during the week for non-faith-based early childhood education.	<b>Resources / Who is responsible</b>	<b>Monitoring / Dates</b>

<b>Objective 2</b>		
Temple Beth El’s facility is used to host events that attract young people from the larger community.		
<b>Action Step #1</b> Connect with Metro Parks Tacoma and Tacoma Community College to host community offerings and/or classes.	<b>Resources / Who is responsible</b>	<b>Monitoring / Dates</b>
<b>Objective 3</b>		
Temple Beth El’s facility is used to reach out to interfaith families.		
<b>Objective 4</b>		
Temple Beth El’s facility hosts events that meet the needs of senior citizens.		
<b>Action Step #1</b> Connect with Metro Parks Tacoma.	<b>Resources / Who is responsible</b>	<b>Monitoring / Dates</b>
<b>DESIGN STATEMENT 3</b>		
Temple Beth El’s building and grounds create a safe, secure, and welcoming environment.		
<b>Objective 1</b>		
We balance security needs with the need to be welcoming.		
<b>Objective 2</b>		
We employ security measures that are best practices and deliver a appropriate return on investment.		

**Education Functional Area:  
Religious Education Committee, Adult Education Committee,  
Scholarship Committee  
Strategic Plan**

<b>DESIGN STATEMENT 1</b>
Through communal learning, the Temple Beth El family forges connections ( <i>kehillah</i> ), provides inspiration ( <i>kedushah</i> ), and strengthens both itself and the larger Jewish community throughout the journey from birth to death.
<b>Objective 1</b> Temple Beth El offers continuing professional development and certification to recruit and support highly qualified educators.
<b>Objective 2</b> Temple Beth El boasts a high level of Jewish literacy among its temple family, including, but not limited to, Hebrew, Jewish texts, and ritual familiarity.
<b>Objective 3</b> Our facilities, materials, and resources are cutting edge and top-notch.
<b>Objective 4</b> Our educational committees, in conjunction with the cantor and rabbi, continually create and support relevant and responsive educational opportunities.
<b>Objective 5</b> Our Temple Beth El family is engaged in all educational opportunities, celebrating these offerings as a chance to both become better connected with their spiritual home and connect with their heritage.
<b>Objective 6</b> Family education is a priority at Temple Beth El. We see education as an opportunity for intergenerational connections.
<b>Objective 7</b> The Temple Beth El family supports and sustains its young people, consistently offering them opportunities to develop leadership skills.
<b>DESIGN STATEMENT 2</b>
Temple Beth El is a welcoming center of Jewish learning for all individuals in our regional community.
<b>Objective 1</b> Temple Beth El has sustainable funding for programming with no financial barriers to participation.
<b>Objective 2</b> Temple Beth El attracts and enables participation from within and outside our Temple Beth El family.
<b>Objective 3</b> Temple Beth El’s education program is inclusive of all learners with diverse needs and backgrounds.



***Finance Functional Area:  
Budget & Finance Committee, Investment Committee,  
Legacy Committee  
Strategic Plan***

<b>DESIGN STATEMENT 1</b>
We recognize and embrace that solid finances are a foundation of a vibrant and growing community.
<b>Objective 1</b> Dues commitments are set at a level that encourages and maintains membership.
<b>Objective 2</b> There is a high degree of additional voluntary contributions which support and sustain Temple Beth El.
<b>DESIGN STATEMENT 2</b>
Temple Beth El’s financial management is clear, transparent, and accountable to our membership.
<b>Objective 1</b> Our financial processes and oversight are simplified to help attract and retain members in financial leadership roles.
<b>Objective 2</b> The roles of staff and board oversight are clearly defined.
<b>Objective 3</b> TBE staff is trained and uses the appropriate financial tools and technology.
<b>Objective 4</b> The TBE board is educated in financial processes needed for fiduciary oversight.
<b>DESIGN STATEMENT 3</b>
The legacy program and giving for endowment purposes is actively promoted and has been embraced by our membership.
<b>Objective 1</b> 10% of our budget is covered by endowment-related revenue streams.
<b>DESIGN STATEMENT 4</b>
Our budget is comprised primarily of sustainable income sources.
<b>Objective 1</b> The committee makes periodic recommendations to the TBE board that help our budget become more dependent on sustainable income sources.
<b>Objective 2</b> The year-over-year net growth of TBE’s investment portfolios meets or exceeds the selected market benchmarks.

***Fund Development Functional Area:  
Fundraising Committee and Endowment Committee  
Strategic Plan***

<b>DESIGN STATEMENT 1</b>
We have a culture of giving and tzedakah at Temple Beth El.
<b>Objective 1</b> We understand that fundraising begins with engagement in the community, and that engagement creates a sense of belonging within TBE culture.
<b>Objective 2</b> We cultivate an understanding of the importance of tzedakah toward one another, Temple Beth El, the local community, and the world.
<b>Objective 3</b> Every donor at every level is appreciated, recognized, and valued.
<b>Objective 4</b> We make expectations regarding donations clear at the time of the donation.
<b>Objective 5</b> Temple members regularly donate to the endowment.
<b>Objective 6</b> Members of a younger generation at Temple Beth El are committed donors, and are taking leadership roles.
<b>DESIGN STATEMENT 2</b>
Fundraisers are events that deepen connections with people.
<b>Objective 1</b> Fundraisers are embraced by the community to generate funds for special purposes/needs.

## ***Membership Committee*** **Strategic Plan**

<b>DESIGN STATEMENT 1</b>
Temple Beth El welcomes people of all ages and backgrounds.
<b>Objective 1</b> Members take responsibility to welcome and include others under the guidance of the Temple Beth El board, clergy, and membership committee.
<b>Objective 2</b> We inform the community about our programming and opportunities through an extensive outreach plan by clergy, staff, and lay leaders.
<b>Objective 3</b> All programming includes opportunities for interaction so that those in attendance can connect with one another on a personal level.
<b>DESIGN STATEMENT 2</b>
Temple Beth El encourages and supports individuals and families to become members of our congregation.
<b>Objective 1</b> Individuals and families develop meaningful relationships and come to feel a sense of connection and belonging to our Jewish community.
<b>Objective 2</b> Prospective members understand the importance of making a financial commitment to sustain our house of worship, staff, and programming.
<b>Objective 3</b> Committee members, mentors, clergy, and office staff serve as navigators and provide information and a sense of familiarity to newcomers.
<b>Objective 4</b> Outside involvement in our Temple Beth El community is constantly increasing.
<b>DESIGN STATEMENT 3</b>
Temple Beth El creates an environment of belonging which encourages ownership and a strong personal Jewish identity.
<b>Objective 1</b> Temple Beth El members of all ages are involved and participate in services (Friday evening, Saturday morning, and holiday services), education, committees, and other temple events.
<b>Objective 2</b> The membership committee, in conjunction with other relevant committees, facilitates and encourages programming that allows new and/or prospective members to interact with current members in smaller, more intimate settings.

## *Nominating/Leadership Development Committee* **Strategic Plan**

<b>DESIGN STATEMENT 1</b>		
<p>Temple Beth El has a culture of involvement. We recognize that within an individual, leadership is a developmental process, and TBE’s Nominating/Leadership Development Committee supports that process. We have a proactive, ongoing process of leadership development that identifies, orients, and trains new leadership at Temple Beth El.</p>		
<p><b>Objective 1</b> We identify potential leaders at or before the time they join Temple Beth El.</p>		
<p><b>Objective 2</b> We identify the skills each member or potential member brings to our community.</p>		
<p><b>Objective 3</b> We recognize that leadership and involvement can take many forms (e.g. time available, skills, and interests), and we strive to match individuals with appropriate roles and with the needs of the synagogue.</p>		
<p><b>Objective 4</b> We provide formal orientation, including the sharing of expectations, for board members, committee members, and other leaders at Temple Beth El.</p>		
<i><b>Action Step #1</b></i>	<i><b>Resources / Who is responsible</b></i>	<i><b>Monitoring / Dates</b></i>
Create a formal vetting process for potential board members.		
<i><b>Action Step #2</b></i>	<i><b>Resources / Who is responsible</b></i>	<i><b>Monitoring / Dates</b></i>
Update board notebook and provide to new board members.		
<i><b>Action Step #3</b></i>	<i><b>Resources / Who is responsible</b></i>	<i><b>Monitoring / Dates</b></i>
Develop a formal orientation for new board members.		
<i><b>Action Step #4</b></i>	<i><b>Resources / Who is responsible</b></i>	<i><b>Monitoring / Dates</b></i>
Develop/obtain a leadership training curriculum for new board members and other TBE leaders.		
<p><b>Objective 5</b> We train interested individuals at Temple Beth El in leadership skills.</p>		
<b>DESIGN STATEMENT 2</b>		
<p>The Nominating/Leadership Development Committee performs its duties on a year-round, ongoing basis. We are a diverse committee that recruits a diverse group of leaders that is broadly representational of the current and future Temple Beth El community.</p>		
<p><b>Objective 1</b> The committee recruits members for board positions that are representative of the diversity and demographics of our Temple membership.</p>		

## *Personnel Committee* Strategic Plan

<b>DESIGN STATEMENT 1</b>
Temple Beth El’s personnel committee provides oversight that insures that building community and creating connections are the foundational components of the job responsibilities of all Temple personnel.
<b>Objective 1</b> As an essential component of their leadership, temple clergy (i.e. the rabbi and cantor) engages temple office staff in a process that allows them to fully incorporate the principles of building community and creating connections into the performance of their job duties and responsibilities.
<b>Objective 2</b> The personnel committee supports the ability of temple staff to operationalize the principles of building community and creating connections into their daily work.
<b>Objective 3</b> The execution of annual evaluations for temple clergy and temple office staff incorporates a review of the implementation of the principles of building community and creating connections into individual job performance.

## *Temple Beth El Staff* Strategic Plan

<b>DESIGN STATEMENT 1</b>
Temple Beth El is a welcoming, positive, inclusive, open community. Temple Beth El welcomes diversity.
<b>Objective 1</b> Temple Beth El staff builds strong and lasting relationships with our Temple Beth El family.
<b>Objective 2</b> We respond to the larger community in ways that lay the foundation for lasting connections.
<b>Objective 3</b> We identify ways for the Temple Beth El community to be more inclusive and diverse.
<b>Objective 4</b> We promote an atmosphere of respect and tolerance in accordance with Reform Judaism’s values and beliefs.
<b>Objective 5</b> Staff works with Temple Beth El lay leadership to clearly define roles and responsibilities to support the work of the community.
<b>Objective 6</b> Staff works to build relationships with one another through social functions and character-building exercises.
<b>Objective 7</b> Staff works to provide continuity for the ever-changing world that is Temple Beth El.

## ***Ritual Committee*** **Strategic Plan**

<b>DESIGN STATEMENT 1</b>
Temple Beth El offers worship experiences which reflect both an appreciation of tradition and innovation.
<b>Objective 1</b> Temple Beth El provides a variety of worship experiences both inside and outside the synagogue to meet the diverse needs of the community.
<b>Objective 2</b> Worship services and rituals renew connections with Judaism and the Jewish people.
<b>Objective 3</b> Worshippers come away from services challenged, inspired, motivated (tikkun olam), and with greater knowledge.
<b>DESIGN STATEMENT 2</b>
Temple Beth El's approach to worship and ritual encourages active participation in services, nurtures religious journeys, fosters relationships among community members, and deepens connections to Torah and the Jewish people.
<b>Objective 1</b> Worship services and rituals help community members progress along their individual spiritual journeys.
<b>Objective 2</b> Temple Beth El inspires community members to develop and embrace Jewish rituals as part of their daily life.
<b>Objective 3</b> Temple Beth El instills a sense of responsibility among community members to support life cycle events.
<b>Objective 4</b> Temple Beth El creates opportunities for post-b'nei mitzvah students and adult congregants to lead the community in worship.
<b>Objective 5</b> Community members come away from services uplifted, renewed, and at peace.
<b>Objective 6</b> Community members create new life cycle rituals and feel a sense of responsibility and ownership for their life cycle events.

## ***Tikkun Olam Committee*** **Strategic Plan**

<b>DESIGN STATEMENT 1</b>
Looking inward: Everyone who interacts with Temple Beth El feels part of our loving family.
<b>Objective 1</b> We actively welcome and engage all participants from the beginning to the end of each service/event.
<b>Objective 2</b> We develop a culture where everyone is responsible for welcoming and promoting inclusiveness.
<b>Objective 3</b> We support our community members who are in need by providing programming, projects, and services.
<b>DESIGN STATEMENT 2</b>
Looking outward: Temple Beth El creates opportunities of social justice to inspire and engage the community in repairing the world.
<b>Objective 1</b> We provide instructional programming for our community to help in understanding the pursuit of social justice.
<b>Objective 2</b> We encourage our community to actively advocate for social justice.
<b>Objective 3</b> We create opportunities for our community to participate in social justice.
<b>Objective 4</b> We partner with groups to repair our greater community, our country, and our world.

# Appendices

The appendices listed below may be found in a separate document called “Temple Beth El 2013-18 Strategic Plan, Part 2,” available on TBE’s website, <http://templebethel18.org>. 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.”

## Appendix I – General

- Timeline of our strategic planning process
- 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
- Postcard for individual congregant commitment to the overarching theme