



The Steering Committee is grateful to these individuals, and to many others who participated in the planning process, for their time, energy, and commitment to Beth Shalom’s future.

### **Previous planning work**

The starting point for the planning process was Beth Shalom’s 2010 Vision and Mission Statements (attached at Appendix “A”). The Committee also had the benefit of:

- Notes from 2010 Strategic Planning Session [Appendix “B”]
- *A Preferred Future for Beth Shalom*, a draft vision document prepared by Rabbi Kliel in 2014 [Appendix “C”]
- Final Report of the 2015 Vision Committee (review and comment on *A Preferred Future for Beth Shalom*) [Appendix “D”]

### **Overview of the planning process**

The Committee reviewed our demographics, our financial position, our membership history, and our past and current programming. We carried out interviews with Committee Chairs, undertook a Situation Analysis (Strength, Weakness, Opportunities, and Threats), participated in a visioning exercise with the Board, and conducted a congregational survey. We established 5 Task Forces to develop recommendations on different aspects of the emerging plan, and facilitated a community wide discussion (Town Hall Meeting) in June on the emerging recommendations of the Plan. Details of the planning steps taken are set out in Appendix “E”.

### **Key planning documents developed by the Steering Committee in 2015-2016**

- Factbook and additional Background Information [Appendix “F”]
- Committee Chair Interview Worksheets [Appendix “G”]
- Outline of programming currently offered in each of the priority planning areas [Appendix “H”]
- 2015 Congregational Survey Results [Appendix “I”]
- Situation Analysis and SWOT (Strength, Weaknesses, Opportunities, and Threats) analysis [Appendix “J”]
- Notes from Visioning Exercise with the Board [Appendix “K”]
- Task Force Terms of Reference [Appendix “L”]
- Task Force Final Reports [Appendix “M”]

### **Highlights of feedback**

The following key findings of the Beth Shalom 2015 Congregational Survey indicate general priorities of our membership. Note that there were 50 responses to the survey. (Percentages are rounded; complete Survey results are attached as Appendix “I”):

#### ***Why have you chosen to continue to be a member of our congregation?***

(Top 5 answers indicated by respondents as “very important”)

- Branch of Judaism (Conservative) (65%)

- Feel a sense of community (57%)
- Warm and welcoming (53%)
- Content and conduct of services (38%)
- Other family members belong (32%)

***Which do you agree with?***

- Maintaining tradition is very important (16%)
- Maintaining tradition while allowing change is very important (74%)
- Our times call for more focus on change (10%)

***Overall satisfaction with Beth Shalom Congregation***

- Very satisfied (23%)
- Somewhat satisfied (60%)
- Neither satisfied nor unsatisfied (8%)
- Somewhat unsatisfied (6%)
- Very unsatisfied (2%)

***I would enthusiastically promote Beth Shalom to a friend***

- Strongly agree (35%)
- Agree (47%)
- Neutral (12%)
- Disagree (4%)
- Strongly Disagree (2%)

***How likely are you to remain a member in 5 years?***

- Very likely (79%)
- Somewhat likely (13%)
- Unlikely (4%)
- Very unlikely (0%)
- Don't know (4%)

***Critical issues facing our congregation***

(Top 5 answers indicated by respondents as “very important”)

- Making the synagogue a place where everyone feels at home (85%)
- Giving youth a strong Jewish identity (74%)
- Attracting new members (70%)
- Giving adult members a sense of vision and purpose as Jews (67%)
- Providing inspiring worship experiences (66%)

***Commitment to Jewish and General Community***

- Feel it is essential to support Jewish causes (66% Strongly Agree)
- Feel it is essential to give to causes in general (57% Strongly Agree)
- Feel it is essential to support Israel (60% Strongly Agree)

The survey findings, the feedback from interviews and the Town Hall meeting, and other comments received, show that our members place an especially high value on (among other priorities)

- belonging to a Conservative kehilla where they feel welcome, at home, and part of a community
- giving youth and adult members a strong sense of Jewish identity, vision and purpose
- attracting new members
- beautiful, inspiring services

The most common response (to the 3<sup>rd</sup> and 4<sup>th</sup> questions, above) was that respondents were “satisfied” with Beth Shalom and “agree” they would enthusiastically promote Beth Shalom to a friend. The Committee feels it would be appropriate for the Board, over the next 5 years, to focus on moving most of these respondents into the “very satisfied” and “strongly agree” categories.

### **The Big Picture**

The overarching priority identified through the strategic planning work was the need to

*engage, care for, and empower our members by providing them with meaningful, well-communicated opportunities to grow as Jews and contribute to our community*

The Committee sees this priority as

- central to our continuing purpose as a Conservative synagogue
- critical to maintaining (and increasing!) membership and
- essential for ensuring the long-term financial viability of our congregation

### **Priority planning areas**

The process overseen by the Committee lead to the following priority planning areas:

1. Build a more socially engaged and welcoming community for families with children
2. Build a more socially engaged and welcoming community for adults
3. Enhance Jewish learning for youth
4. Enhance Jewish learning for adults
5. Build a more caring and just community

### **High Level Commitments**

Implementing the recommendations in this Strategic Plan (detailed in the chart below) will require action and oversight by the Board and religious staff in seven areas (not in order of priority):

1. Ensure newcomers and those seeking greater involvement in our community feel engaged, included and welcome. Make welcoming, inclusion, and hospitality a core aspect of our “brand”. Establish a Welcome Committee to oversee this with clear Board support and oversight
2. Enhance and increase ritual participation at shul and in the home
3. Ensure ill and isolated members, and mourners, feel supported and cared for. Re-establish a Bikkur Holim Committee to oversee this with clear Board support and oversight

4. Increase meaningful opportunities for members to improve the lives of others in and beyond our community. Re-establish a Tikkun Olam Committee to oversee this with clear Board support and oversight
5. Enhance and diversify programming
6. Improve communications with members
7. Hire one additional full-time staff person (or potentially two part-timers) with primary responsibility for 1) programming (including youth) and 2) communications
8. Dedicate one or more board members as responsible for overseeing implementation of the Strategic Plan

**Note on existing Beth Shalom Vision and Mission Statements (2010)**

The Strategic Planning Committee reviewed, but did not consider changes to, the Vision and Mission Statements approved by the Board in 2010 (attached as Appendix “A”). We recommend the Board establish a working group in 2017 to review whether any changes to these Statements are needed.

**Strategic Planning Recommendations**

The chart below sets out the Strategic Plan recommendations (Objectives and Actions). They are based on the work of the Task Forces, with feedback from the Town Hall meeting and further input from the Steering Committee. New ideas from the Town Hall Meeting are included in the chart as examples. The chart is organized by suggested area of responsibility, although the Board will ultimately decide what individual or group will be responsible for each of the recommended actions. The chart includes a suggested implementation timeline for each action (timeline is based on date of Board approval of this Plan).

Appendix “N” is a breakdown showing the same recommendations, but organized by Task Force.

For reference, the numbers referred to in the “objectives” column in the chart below (e.g. 1(3)) refer to the Task Force that made the recommendation and the priority that action was given by the Town Hall participants (relative to the rest of that Task Force’s recommendations).

The complete Task Force reports are attached at Appendix “M”.

Board/Executive		
Objectives	Actions	Timelines
<p>Task Force 1 (2) Improve communications with families</p> <p>Task Force 2 (3) Improve communications with membership</p> <p>Task Force 3 (2) Hire a full time or part time youth director with direct responsibility for youth group (e.g. <i>Kadima</i>), programming, and participation.</p>	<p>Hire new staff person with strong youth rapport and the strong social, motivational, communication, computer/web/media, and organizational skills to carry out the tasks assigned to the new hire (see below)</p>	<p>0-6 months</p>
<p>Task Force 1 (4) and 2 (1) Make welcoming and inclusion a core aspect of Beth Shalom’s “brand”</p>	<p>Establish and recruit a Welcome Committee dedicated to ensuring everyone feels welcome at Beth Shalom</p>	<p>0-6 months</p>
<p>Task Force 4 (2) Increase opportunities for Jewish learning that are convenient and single-event or mini-series format, yet offer substantial learning engagement</p>	<p>Recruit additional members to the Adult Education Committee</p>	<p>0-6 months</p>
<p>Task Force 5 (1) and (3) Enhance and expand our capacity to visit ill members of our community</p> <p>Enhance and expand support provided to our mourners</p>	<p>Re-establish and recruit a Bikkur Cholim Committee</p>	<p>0-6 months</p>
<p>Task Force 5 (2) Enhance and expand the social action of our kehilla</p>	<p>Re-establish and recruit a Tikkun Olam (Social Action) Committee</p>	<p>0-6 months</p>

Rabbi and religious staff		
Objectives	Actions	Timelines
<p>Task Force 2 (1) Make welcoming and inclusion a core aspect of Beth Shalom’s “brand”</p>	<p>With President, encourage members to celebrate Shabbat at home and to invite other members for Shabbat and holiday dinners in their homes (hospitality as a Jewish value). For example, in an address from the bima, messages in shul bulletin and newsletter, and in discussion and study groups</p> <p>With input from Ritual Committee, clarify and</p>	<p>0-6 months</p> <p>2-4 years</p>

	communicate Beth Shalom’s approach to intermarried Jews and interfaith couples and families. Consultation with membership is recommended. USCJ support is available	
Task Force 3 (1) Increase youth involvement in Saturday morning services on anniversary of Bar / Bat Mitzvah or birthday	Make phone calls to reach out to kids to ask them to participate in services (daven, torah or haftarah, ashrei, Kiddush, bentch, etc.) This could be delegated to the new hire  Recruit adult mentors, to assist youth in refreshing training one-on-one as needed	0-6 months  2-4 years

New Hire		
Objectives	Actions	Timelines
Task Force 1 (2), 2 (3) and 3 (3) Improve communications with families  Improve communications with membership	More effective and timely notice of Beth Shalom activities  More effective use of new media (website, ShulCloud, facebook, twitter, etc)  Create and maintain a modern, informative and welcoming website  Optimize use of ShulCloud computer software (which Beth Shalom now has)  Collect and update info on member demographics and interests to create current database of youth  Send out targeted reminder emails prior to youth events  Send “opt-in” reminders for parents based on child’s interest	0-6 months from hiring
Task Force 1 (3) Engage bar/bat mitzvah aged youth in Jewish social activities	Including: get Kadima up and running, and organize fundraising activities to send Kadima kids away to an annual event such as USY convention or Shabbaton	0-6 months from hiring
Task Force 2 (1) Make welcoming and inclusion a core aspect of Beth Shalom’s “brand”	Promote or create opportunities to socialize and HAVE FUN together. Examples: <ul style="list-style-type: none"> <li>- A weekly or monthly seniors’ social activity</li> <li>- A weekly Beth Shalom or community bowling league</li> <li>- Kids’ Table at community Shabbat dinner with games and supervision</li> </ul>	0-6 months from hiring

Task Force 3 (4)	Organize children to participate (sing) at Kabbalat Shabbat services at Beit Horim/OPH	6 months – 2 years from hiring
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Welcome Committee		
Objectives	Actions	Timelines
Task Force 1(4) Develop a “Welcome Program”	Develop a “Welcome Program” with a focus on new members and reaching out to new families	0-6 months
Task Force 2 (1) Make welcoming and inclusion a core aspect of Beth Shalom’s “brand”	<p>Examples:</p> <ul style="list-style-type: none"> <li>- Provide transliterations of all Hebrew prayers for Kabbalat Shabbat and Shabbat morning services</li> <li>- Offer ESL classes for newcomers</li> <li>-</li> </ul> <p>Ensure both the Rabbi and spouse have an opportunity to connect with as many congregants as possible after Shabbat morning services. Example:</p> <ul style="list-style-type: none"> <li>- Hire a babysitter, or involve Bnei Mitzvah class or other volunteers in providing child care as needed</li> </ul>	<p>6 months – 2 years</p> <p>0-6 months</p>

Rabbi/Religious staff and Programing Committee		
Objectives	Actions	Timelines
Task Force 1 (1) Develop and institute a SHABBAT PROGRAM to increase knowledge and participation in Shabbat rituals	Provide support for families to celebrate Shabbat at home including written resources, training from Rabbi/lay leaders, food and ritual items, informal potluck Shabbat dinners in park, monthly communal Shabbat dinner and service with family focus, annual Shabbat family retreat off-site with dynamic speaker	6 months – 2 years

Programming Committee		
Objectives	Actions	Timelines
Task Force 3 (5) Advertise or cosponsor PJ Library event / sub-event	<p>Coordinate and promote sign-up for PJ Library</p> <p>Budget for book costs, food and beverages for children</p>	0-6 months
Task Force 4 (3) and 4 (4) Combine educational events with a social element and a ritual observance, to promote community, learning and	Develop single topic events, e.g. Havdallah with shared stories about practices in other parts of the world, conversion stories, incorporating new traditions and practices, sharing meaningful Judaica, informal learning	6 months – 2 years

<p>engagement among diverse groups including those less able to attend programs at Beth Shalom</p> <p>Jewish cooking – help members learn the cuisine for central holidays, how to observe Kashrut at home, and cultural differences from Jewish traditions around the world</p>	<p>Including:</p> <p>Offer cooking class lead by individuals with significant knowledge and passion for Jewish cooking and Kashrut</p> <p>Focus is on adults, but look for ways to get kids involved</p>	
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Ritual Committee		
Objectives	Actions	Timelines
<p>Task Force 2 (2)</p> <p>Create opportunities and offer training for more members to participate in services</p>	<p>Diversify the pool of members who are given honours and invited to participate in services</p> <p>Regularly offer basic, informal training to newcomers and converts on how to take an aliyah</p> <p>Provide more resources/training for lay service participants and leaders to ensure <u>beautiful</u> services</p>	<p>0-6 months</p> <p>0-6 months</p> <p>6 months – 2 years</p>
<p>Task Force 4 (1)</p> <p>Increase congregational participation in services by developing confidence and skills in members. Improve davening and laying</p>	<p>Create small clusters to work together to learn specific parts of service or trope</p> <p>Provide training to lead morning minyan service as well</p>	<p>0-6 months</p> <p>0-6 months</p>

Adult Education Committee		
Objectives	Actions	Timelines
<p>Task Force 4 (2)</p> <p>Increase opportunities for Jewish learning that are convenient and single-event or mini-series format, yet offer substantial learning engagement</p>	<p>Plan for all adult ages, but be sure to consult with 20-35 year olds about what learning would inspire them</p> <p>As appropriate, use Beth Shalom website to post reading list or text. Coordinate with library displays and purchases</p>	<p>0-6 months</p> <p>6 months – 2 years</p>
<p>Task Force 4 (5)</p> <p>Increase knowledge of Jewish tradition among converts and refresh and deepen knowledge among those born into the tradition</p>	<p>Offer a high level course in blocs (e.g. on 3 consecutive Mondays, or weekly for 8 weeks, or bi-weekly for 3 months) during the academic cycle, to build upon the general intro to Judaism course currently offered. This should be done on a regular basis</p>	<p>2-4 years</p>

Bikkur Cholim Committee		
Objectives	Actions	Timelines
Task Force 5 (1) Enhance and expand our capacity to visit ill members of our community	Help organize visits (as appropriate) to the ill at hospital and at home	0-6 months
	Work with pastoral care units in hospitals, including arranging for security clearances (gives better access to sites, info and parking privileges)	6 months – 2 years
	Provide “effective visiting/comforting” training workshop with qualified counsellor for committee members and others who are interested	6 months – 2 years
Task Force 5 (3) Enhance and expand support provided to our mourners	Take all available steps to ensure a morning minyan for mourners. Work with religious staff to maintain up-to-date list of people available to attend minyan and contact them in a timely manner as required	0-6 months
	We recommend the following be considered further by the new Bikkur Cholim committee:	
	<ul style="list-style-type: none"> <li>- providing fruit baskets to mourners</li> <li>- expanding support beyond shiva. Consider partnering with other orgs e.g. JFS to provide a workshop from the Jewish perspective on the year of adjustment after bereavement</li> </ul>	0-6 months  2-4 years

Tikkun Olam Committee		
Objectives	Actions	Timelines
Task Force 5 (2) Enhance and expand the social action of our kehilla	Organize 3 donation drives per year on major holidays (Rosh Hashanah, Hanukah, Purim)	0-6 months
	Organize and volunteer for Bissell Centre lunch 2x per year and involve Bnei Mitzvah class	6 months – 2 years