



**Strategic Plan  
2018 – 2021**

**Adopted by the Board of Directors  
November 16, 2017**



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## PURPOSE OF THIS STRATEGIC PLAN

This Strategic Plan is intended to guide the focus of Temple Beth Am over the next three years. As the nature of participation in religion and religious organizations is changing, and as the demographics and diversity of our community expand the range of Jewish experience, synagogues must examine what it means to be relevant and provide meaning.<sup>1</sup> Rather than being a road map of *what* we do to get from Point A to Point B over the next three years, this Plan is a guide to the *why* and the *how*. By not prescribing specific implementation steps, this plan encourages us to experiment, adjust, and adapt so that we can be ready to meet the future.

Over the past decades, synagogues have often made “membership” synonymous with “community,” and thus come to focus on sustaining the institution, rather than investing in the community for its own sake. While it may seem like a subtle difference, congregations that are thriving today make a clear distinction between the two. At each step along the way of implementing this Plan, we will ask ourselves, “is this in service of the community or the institution?”

And while organizational sustainability is a major focus of this Plan, it also recognizes that the beating heart of our community is the people who make up our congregation. Seen in that light, the purpose of sustainability is not to perpetuate the institution for its own sake, but to continue to meet the needs and priorities of our congregants.

This Plan envisions a congregation that embraces connection, and that works explicitly to build a strong, meaningful, and engaged Jewish community. We will prioritize relationships and shared Jewish values as our foundation. We strive to be a congregation where everyone feels a sense of ownership and responsibility for each other and our community, and will feel empowered to contribute their ideas, energy, and resources to achieve our collective vision.

With this plan, some things will stay the same and some things will change. There is risk in change, but we also know that given the changing demographics and nature of the community in which we live, there is risk in *not* changing. Over the course of implementing this Plan, we will learn to take appropriate risks - when to be bold and when to be more restrained. To encourage experimentation, this Plan defines *strategies* to help us achieve our mission, while suggesting but not prescribing the *specific actions* we will take. Once the board adopts this plan, the board, staff, and other lay leaders will create implementation plans with timelines, measures, and specific actions tied to specific people to achieve the priorities.

We will use the next three years as a time to reflect on what we are doing now and to practice new ways of working; we will test new approaches in order to learn what works and supports

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<sup>1</sup> See Trends Report, available at [http://www.templebetham.org/images/BoardofTrustees/TBASPTrendsReport-FINAL\\_2.pdf](http://www.templebetham.org/images/BoardofTrustees/TBASPTrendsReport-FINAL_2.pdf).

our mission. Some of our experiments may not work out as expected - such is the nature of experimentation. We define “failure” as failing to learn from what didn’t go well. Over the next three years we will till the soil with new ideas about what it means to build Jewish community in this generation, preparing us to grow and thrive for many years to come.

Over the next three years we will strengthen our adaptive leadership<sup>2</sup>, let go of ways of working that no longer serve our goals in favor of new approaches, and invest in leadership development to empower current and emerging leaders with the skills and knowledge from which we will all benefit well into the future.

We will align our operations with the vision of this Plan. We know this will mean new ways of doing things and will promote new forms of collaboration. The structure of this plan, quite intentionally, organizes goals and strategies thematically rather than departmentally. While structural adjustments may be difficult, research across the nonprofit sector points to the importance of this kind of realignment, and we believe Temple Beth Am is well positioned to take on this work over the next three years. Further, this plan recommends investments, such as increased data analysis and technology sophistication, to facilitate collaboration and exchange of ideas across departments, to improve community connection, and to implement key strategies.



## **GRATITUDE**

We would like to thank all the people who contributed to the creation of this strategic plan: Bonnie Berk, Greg Berkman, Shelly F. Cohen, Lisa Colton, Barbara Green, Jeremiah Isgur, Abbi Kaplan, Andrea Lieberman, Betsy Maurer, Robin Shapiro, and Rabbi Ruth Zlotnick – and the hundreds of Temple Beth Am members who responded to the community survey, participated in focus groups and individual interviews, and gave us feedback at the 2017 annual meeting. We could not have done this without all of you.

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<sup>2</sup> Adaptive Leadership is a practical leadership framework that helps individuals and organizations adapt and thrive in challenging environments. It is being able, both individually and collectively, to take on the gradual but meaningful process of change. See, e.g., <http://digitalcommons.andrews.edu/cgi/viewcontent.cgi?article=1054&context=jacl>.

## VISION, MISSION, AND VALUES

The vision, mission and values of an organization form the foundation of a strategic plan. All other elements of the plan are derived from this foundation.

The **vision** is an aspirational statement of what we hope will be accomplished as a result of our work; its focus is on the future.

The **mission** is the reason the organization exists; in an effective organization, every action and decision that the organization makes is in service of its mission. For a nonprofit organization, which has no “owner” in the traditional sense, it can be said that the mission “owns” the organization.<sup>3</sup>

The **values** are deeply held beliefs that guide our behavior, or how we do our work. Unlike the vision, they are not aspirational. They may, however, change over time as our community evolves. Our founding **principles** define the historical foundation of Temple Beth Am; they are the link from our past to our future, *l'dor v'dor* - from generation to generation.

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<sup>3</sup> <http://www.congregationalconsulting.org/who-owns-a-congregation/>

## VISION

Inspiring lives and healing the world through powerful Jewish experiences.

## MISSION

We deepen relationships to Judaism and our community by engaging the soul, heart, and mind.

## VALUES

**Inclusion: We welcome everyone into our community.** We embrace diversity so that people feel seen and heard and everyone is invited to participate. We honor all levels of Jewish knowledge.

**Inspiration: We nourish the soul, mind, and body.** We affirm Judaism's belief that life is a gift from the Divine. We nurture our capacity for gratitude and blessing.

**Purpose: We believe that every individual's life has meaning and what we do matters in the world.** Our actions are rooted in Jewish values, texts and traditions.

**Engagement: We get involved in issues that matter to us to make the world a better place.** We contribute to one another's lives by cultivating kindness, joyously celebrating, and offering solace to heal pain.

**Curiosity: We are inquisitive, eager to learn from our successes and our mistakes.** We strive to continually improve our communication and enhance our organizational health.

**Responsibility: We participate in a web of relationships within and beyond our congregation,** and fulfill our obligations to others locally, nationally and globally. We recognize our special commitment to Am Yisrael, the Jewish people here, in the State of Israel and throughout the world.

## THE TEMPLE BETH AM “DNA”

The one thing that we know won't change is the essence of Temple Beth Am. While the specific articulation of our values and the ways we live them will continue to evolve over time, we still hark back to the founding principles adopted in 1966. We refer to this as the Temple Beth Am “DNA” - something that is in the essence of every aspect of Temple Beth Am, but which may be expressed differently at different times and in different contexts.

### PRINCIPLES

*(approved by the Board of Trustees on May 12, 1966)*

#### **What should a Reform Congregation be?**

***It should be religious.*** We are not primarily a social organization or a cultural association or a political forum. We are here to serve an Intelligence higher than human, a Love greater than our own.

***It should be democratic.*** Our congregation has a splendid tradition of member participation. Let us encourage this tradition. Judaism is not for the Rabbi alone, or the Board alone, or the children alone; it is for all of us. A congregation does not belong to any one person or group.

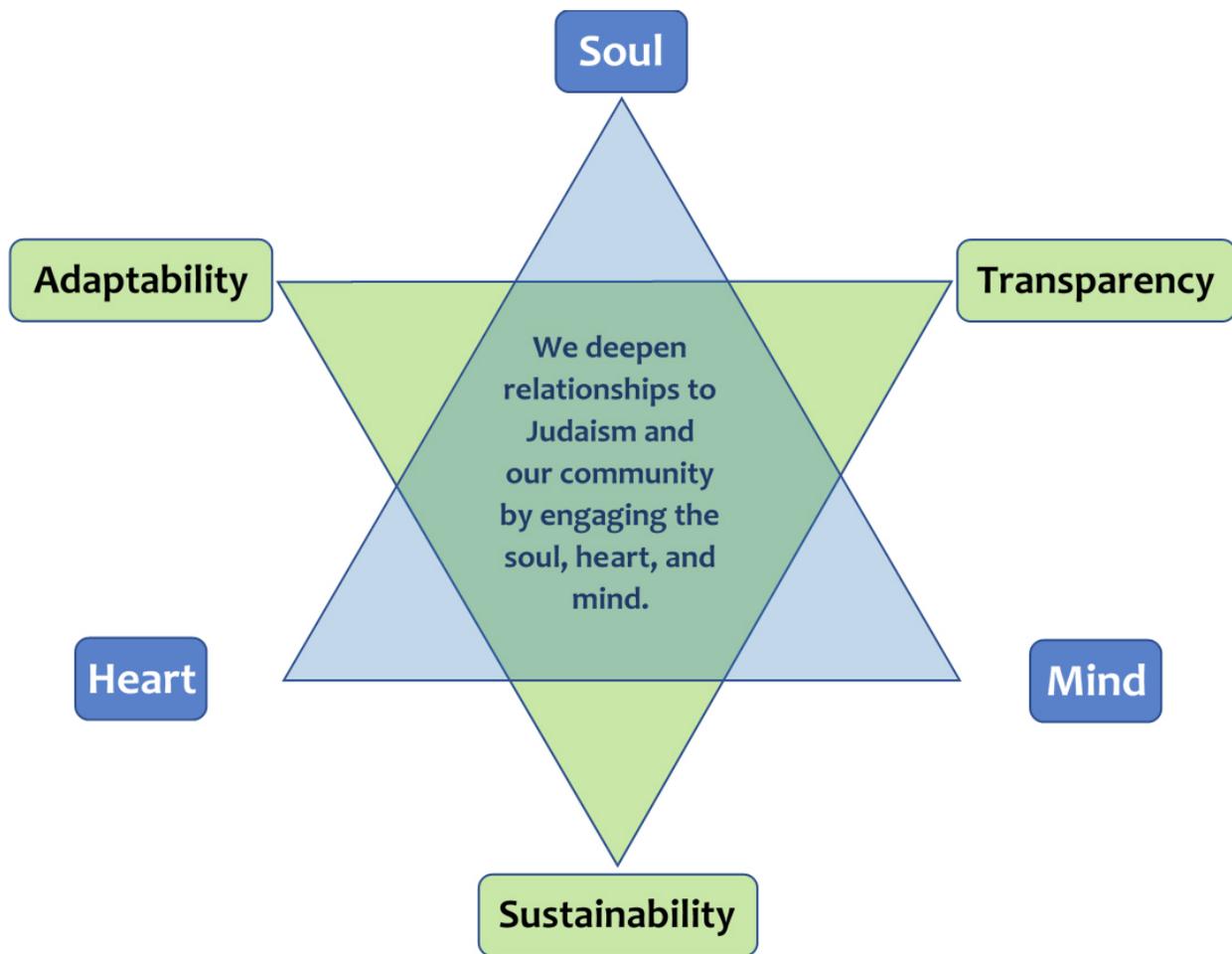
***It should be creative.*** We need new answers for new times. Let us be bold enough to experiment. We are highly blessed in this congregation with intelligence and vision. Let us seize our opportunity, think anew, and extend the frontiers of Jewish life.

***It should be relevant.*** It must be relevant to the needs of society. A synagogue is an oasis for the world, not from the world. Wherever human beings are persecuted or oppressed, it is our concern. Heirs of the prophets, guardians of the moral tradition, we must be unalterably hostile to injustice.

***It should be learned.*** Let difference of opinion abound among us! Only let that opinion be informed. A people who have championed the mind certainly cannot be ignorant about their own religion. And surely in our congregation adults as well as children should be eagerly in pursuit of Jewish knowledge. Let our congregation be religious, democratic, creative, relevant and learned. But let us be all these things without self-righteousness, redeemed by humility and saved by a sense of humor.

## STRUCTURE OF THIS STRATEGIC PLAN

After listening to our community, understanding the environment in which we're working, and studying best practices and leading research in our field, we identified six major strategic priorities for Temple Beth Am for the next three years. These priorities cut across sacred Jewish experiences ("why we do what we do"), as well as culture, operations and leadership ("how we do it"). We believe both are critically important to grow into a more visionary and sustainable 21st century synagogue. These six priorities are not free-standing; they support and amplify each other. We can think about these six priorities not as separate silos but as interdependent principles. We have chosen to present them as points of a Star of David – each important on its own, and exponentially more powerful when combined with the others to create a healthy, holistic Jewish community.



While we have structured this plan around these six priorities, we acknowledge that many of the strategies that follow do not fit neatly into one category or the other. Indeed, we believe they necessarily are integrated with one another, which is why collaboration will be a major theme in the coming years as we align our operations with these priorities.

## **PRIORITY #1: SOUL: Together we will create powerful Jewish experiences that touch the soul.**

Regardless of our background or upbringing, in today's world we are all Jews by choice, seeking to derive meaning from traditions both ancient and modern. A synagogue provides a Jewish context for understanding the world around us, and it also provides a haven from the outside world. We will use personal prayer, public services, life cycle rituals, lifelong learning, and acts of lovingkindness and social justice, to foster powerful Jewish experiences that help us navigate our lives and connect with something larger than ourselves.

### **Strategies to become a platform for and catalyst of powerful Jewish experiences:**

We will honor our congregants as active agents in being *creators* of powerful Jewish experiences, not just *consumers* of Judaism. Thus, we will seek to empower our community with education, opportunities, and support to create such experiences for themselves, their families and their communities. In this way, "Temple Beth Am" becomes a state of mind, an openness to the spiritual dimension of Judaism, that can be experienced within and outside the synagogue walls.

#### **I. Inspire members to deepen their involvement with Judaism.**

- a. Strive to create an active, reflective and personal component to Jewish experiences, enabling people to share their stories and connect on a personal level with other participants.
- b. Invite people to learn more about and take an active role in ritual (whether within or outside Temple Beth Am), and encourage them to expand and deepen their participation as they become more comfortable.
- c. Learn about what makes for a powerful experience, and create and/or redesign engagement opportunities based on what we learn.
- d. Engage congregants in ongoing reflective conversations about what experiences are meaningful and powerful to them.

For inspiration:

- ["Social Sermon"](#) by Rabbi Paul Kipnes

- II. Encourage more people to become active leaders of communal experiences.**
- a. Provide training for congregants who want to lead services, lead music, or read/chant Torah so that we can expand the number of congregants (e.g. youth, seniors, Jews by choice) who know how to lead prayers and/or read Torah.
  - b. Empower these lay leaders to take their skills outside the building – e.g., leading minyan services, havdalah, or other home-based ritual in neighborhoods or retirement homes.
  - c. Provide training for congregants to be active hosts of events outside the synagogue for various ritual experiences (Shabbat dinner, havdalah, holiday celebrations, etc.)
- III. Explore the diversity of Jewish prayer and spiritual practice to find new ways to engage the soul and deepen congregants’ relationship to Judaism.**
- a. Identify congregants with expertise in spiritual disciplines (e.g. yoga, mindfulness meditation, life coaching, etc.) to partner with clergy to expand our spiritual practices.
  - b. Experiment with different models for services to allow for a variety of religious experiences.
- IV. Provide Jewish experiences outside of the synagogue walls, including in people’s homes, in nature, and in the world, that are values-driven, spiritual, supportive and/or celebratory.**
- a. Diversify the ways in which current members make social connections within our community, and learn about and become involved in Jewish spiritual experiences.
  - b. Create a diverse array of “on-ramps” for those who are not members to build relationships with and learn about the value of being part of the Temple Beth Am community.
  - c. Create spaces with more intimacy and/or creativity and/or personalization.
  - d. Support “doing Jewish” (for example, taking families to Home Depot to buy sukkah supplies and help each other build sukkot; cooking classes prior to key holidays; etc.)

For inspiration:

- [Shabbat Connections](#), Congregation Beth Israel, Charlottesville, VA
- [Sukkah at Home Depot](#)
- Jewish cooking at [The Pantry](#)
- [OneTable](#)

**V. Use technology to enhance participation and access.**

- a. Educate congregants about and implement the use of visual t'filah and/or other appropriate technology in the sanctuary to enhance the spiritual experience.
- b. Explore live-streaming of services so that those who are unable to attend in person can still worship with their community.
- c. Become a “concierge” introducing congregants to apps, websites and online learning that can enhance their prayer lives.

## **PRIORITY #2: HEART: Together we will make strengthening community the “heart” of Temple Beth Am.**

Being part of a community means taking mutual responsibility for one another through *g'milut hasadim* (acts of lovingkindness), and our Jewish tradition teaches us the myriad ways we must act on this responsibility – in our congregation, in our local community, and worldwide. Further, we know that for younger generations, *tikkun olam* (repairing the world) is a major defining factor of Judaism and how they express their Jewish values in the world. While individuals can undertake these actions on their own, we are all strengthened when Jewish values and community form the basis for the work.

**Strategies to make acts of *g'milut hasadim* (lovingkindness) a defining attribute of our congregation and our congregants' experience of Judaism:** We will reaffirm *g'milut hasadim* as a major organizing principle of our congregation, encouraging congregants to engage in these activities at whatever level speaks to them. We will work to help congregants take care of themselves, each other, our Temple Beth Am community as a whole, and the broader communities to which we belong. Over the next three years, we will create opportunities for people to connect with one another over shared interests and passions, and support more small group programming.

### **I. Create a network and structure to facilitate our community members supporting each other in times of need.**

- a. Clarify various kinds of opportunities for connection (e.g. new babies, sickness, transportation, visiting elderly, etc.).
- b. Clarify roles for leaders of each team.
- c. Develop clear communications and protocols for identification of communal needs.
- d. Establish guidelines and systems for managing requests and support. Where possible, match support where there is potential for relationship building and relevant connections.
- e. Identify a continuum of communal/pastoral needs and create a system for referring congregants to peers or clergy, as appropriate.

For inspiration:

- Washington Hebrew Congregation – [condolence list](#)
- [Temple Beth Elohim](#), Wellesley, MA
- [Temple Kol Ami Emanu-El](#), Plantation, FL

**II. Enhance our *tikkun olam* work – whether direct service or advocacy – by broadening opportunities for congregant involvement and expression of Jewish values.**

- a. Establish a structure to coordinate current and emerging *tikkun olam* activities so that they are aligned with the priorities of this strategic plan, and so that *tikkun olam* remains a defining attribute of our community.
- b. Manage *tikkun olam* activities to maximize opportunities for involvement by congregants who are seeking places to “plug in” in ways that are meaningful to them.
- c. Use the small group framework described in section III below to guide the structure of *tikkun olam* project groups.
- d. Build relationships with other local communities to create opportunities for people to engage Jewishly in *tikkun olam* within the communities where they live and work, and to deepen our understanding and support of marginalized communities Jewishly.

**III. Strengthen relationships by providing small group opportunities to add meaning, support, and purpose to congregants’ participation in our community.**

- a. Support creation of small groups across the synagogue, including forming around study interests, affinities, life-stage issues, *tikkun olam*, Shabbat-based, neighborhood based, and other spiritual needs. Provide opportunities for intergenerational groups.
- b. Create peer-leadership guidelines to provide structure and support to such small groups, including weaving Jewish content into the groups.
- c. Recruit and train potential leaders to help launch small groups and as a leadership development pipeline.
- d. Use data to facilitate creation of opportunities for congregants to connect in mutually meaningful ways with each other, across segments or hubs of the community.
- e. Learn from best practices in synagogues and other religious institutions about the role and function of small groups.

For inspiration:

- Temple Emanu-El, Dallas - [Sh’ma Emanu-El](#)
- Temple Isaiah, Lexington, MA - [Isaiah Together](#)
- The Temple, Atlanta - [Temple Connect](#)
- Central Synagogue, New York - [CORE Groups](#)
- Larchmont Temple, Larchmont, NY - [LT Connects](#)

**IV. Lower barriers to participation to make it easier for prospective members to connect with our community.**

- a. Integrate SEED families into synagogue life, provide incentives for membership, and encourage social connections with TBA families, teachers and clergy.
- b. Support our current young families to engage their networks with Temple Beth Am.
- c. Actively welcome and encourage those who are not members to build relationships with and learn about the value of being part of the Temple Beth Am community.

**V. Actively welcome new congregants and integrate them into the fabric of Temple Beth Am.**

- a. Design and implement a new congregant welcoming process that covers the first two to three years that will (i) enable us to get to know them and their interests; (ii) connect them with other people/families with similar interests (e.g., same age kids, same neighborhood, same hobbies, etc.); and (iii) connect them with relevant opportunities to become more involved in community activities.
- b. Publicize new member activities in multiple ways, ranging from social media to personal invitations.
- c. Track new member participation in various activities and reach out proactively if low level of engagement.
- d. Create a new member guide to TBA with information about whom to contact, how to get involved, etc., and make it easily available in multiple formats (hard copy and online).

For inspiration:

- Congregation Rodef Shalom in San Rafael, CA, has a “Moreh Derech” team that follows new members through their first year with calls and emails and invitations to attend programs or services with them. In addition there are a few new member events that they are invited to attend. They are realizing that though the welcome is very important most congregants are much more receptive to getting "involved" or "connected" during their second year, and they are coming up with a new plan to address this.

## **VI. Facilitate members moving from the periphery of the community towards the center.**

- a. Use data to identify congregants who are less connected and prioritize increasing their sense of “belonging” and integration into the community in ways that are meaningful and relevant to their lives.
- b. Pay particular attention to SEED and religious school families to ensure adults are connected around their own interests, not only those of their children.
- c. Train staff and volunteer leaders to create opportunities at all events/gatherings for people to share their stories and connect on a personal level with other participants, and encourage staff and lay leaders to learn from evolving best practices.
- d. Learn about network theory and the role it plays in program design, data collection and use, and skills needed within the Temple Beth Am staff and volunteer leadership.

For inspiration:

- [Designing for Social](#), from Connected Congregations
- Rabbi Ari Moffic’s [ELITalk on Community](#)
- [Network Weaving URJ Social Media Boot Camp](#)

## **VII. Embrace and Design for Audacious Hospitality**

- a. Download and study the Audacious Hospitality Toolkit and the Becoming a Connected Congregation Workbook (beta) (Staff and Board).
- b. Create an Audacious Hospitality working group representing key segments of our community (great opportunity to engage new people in a leadership role) to create and implement an action plan. Areas for this working group and/or other synagogue leadership should include (but may not be limited to):
  - i. Create formal and informal learning opportunities for the congregation to learn skills and practices, and to begin to establish new cultural norms.
  - ii. Create mechanisms to help new members or those less connected be welcomed and integrated at key moments (e.g. matching people for Passover seder or other home-hospitality with relevant people)
  - iii. Evaluate Temple Beth Am culture, policies, and communications with respect to inclusion of our diverse community, and develop recommendations for improvement.

For inspiration:

- [Audacious Hospitality](#) in eJewishPhilanthropy
- Many Faces-One Community, [Stacey Aviva Flint's ELITalk](#)
- [Audacious Hospitality Toolkit](#)

**VIII. Upgrade our technology infrastructure and use it strategically to support community building and engagement, utilizing what we have learned from millennials to serve the needs of all generations.**

- a. Upgrade the synagogue's CRM (constituent relationship management) system to collect and report on more nuanced data more easily to empower staff and volunteer leadership to use data for better design and engagement. The CRM should be an engine for our relational (not just transactional) engagement with members. This may include capturing new kinds of data and establishing new regular reports, as well as making some data and reports transparent to the community (e.g., member directory that can be sorted by neighborhood and grade of kids in religious school).
- b. Use data to facilitate personal connections within our congregation, e.g., connecting parents in Religious School classes, building small groups, or supporting home-based neighborhood programming.
- c. Use data to better reach and engage the periphery of our community, including members who are minimally connected and involved, and those who may be socially connected to our community but are not (yet) affiliating with the congregation.
- d. Create a social media plan and community guidelines to better empower volunteer leaders to convene and engage community members around shared interests. (For example, this may mean more than one Facebook group with more specific purpose.)
- e. Make it easier for congregants to see who has RSVP'd for events and for those who have registered to invite their friends.
- f. Create and implement a plan for mobile communication with our community for last minute alerts, emergency communications, and opt-in event reminders.
- g. Create regular feedback mechanisms to evaluate programming and gather input from congregants.
- h. Use data to understand giving patterns, interests and capacity to support a culture of philanthropy.

For inspiration:

- [A guide to synagogue management software](#) (from Idealware and UJA Federation of NY). (Published 2014, so features may be out of date, but report will be useful general education)
- [Social Media Policy Workbook for Jewish Organizations](#), by Darim Online

### **PRIORITY #3: MIND: Together we will transmit Jewish values and traditions through relevant, challenging, and diverse learning experiences for people of all ages.**

Judaism and Jewish culture place a high value on learning – in fact, it is considered as sacred as prayer or *gemilut hasidim* (lovingkindness). Whether we are a novice or an expert, Jewish learning is inexhaustible and there are always more opportunities for enhancing our Jewish knowledge and deepening our sacred wisdom. The *V’ahavta* instructs us to teach our children; therefore, Jewish learning is cross-generational. The Haggadah and Passover Seder inform us about the Exodus through asking questions and re-enactment; therefore, Jewish learning is active and experiential. According to Jewish tradition, we learn in order to do: that is, when we apply the values of Jewish learning to our daily experiences, our actions can transform the world.

**Strategies for creating diverse learning experiences:** We understand that Jewish learning is not only a programmatic component to synagogue life; it is a sacred dimension integrated into all aspects of Jewish living. Over the next three years at Temple Beth Am we will work towards creating lifelong learning as a fluid continuum of experience that begins in infancy and continues through our senior years. Our learning strategies will embrace both conventional educational approaches (classroom and informal education), and unconventional approaches, where learning enhances and deepens other Jewish activities not explicitly intended to be educational. The goal is to awaken a love of Jewish learning both within and beyond the walls of Temple Beth Am.

- I. Create a culture of lifelong Jewish learning in ways that are meaningful and interesting to a wide range of people.**
  - a. Establish an annual learning theme that can be woven throughout the activities and communications of the synagogue to help everyone have a shared learning path.
  - b. Invest in creating opportunities for “applied Jewish wisdom”, such as small groups on caring for elderly family members or parenting teenagers, where Jewish learning and wisdom can be woven into the content and rhythm of the group. Provide professional support and/or online resources for lay-led groups as needed.
  - c. Invite congregants to propose topics or activities that might interest them to influence the menu of educational offerings. If a critical mass of people want to

explore a topic, help make it happen. This may mean providing space, resources, expertise, data and contact info, publicity, etc.

- d. Integrate Jewish learning into small group experiences in a variety of ways. (See small group examples, above.)

For inspiration:

- [One Book](#), Chicago.
- [Applied Jewish Wisdom](#), from Lippman Kanfer Foundation for Living Torah
- [#MakeltHappen](#) from the Schusterman Family Foundation

## **II. Connect our community to local, regional, national and international powerful Jewish experiences.**

- a. Compile and amplify opportunities that might be of interest to our community members. Specifically reach out to individuals for whom we think these might be a particularly meaningful opportunity. Encourage attendance by “delegations” so that people can share the experience together.
- b. Explore online learning opportunities through [HUC-JIR](#) and other institutions of Jewish learning.
- c. Celebrate and invest in storytelling about/by those who have participated in such powerful Jewish experiences to share the impact, normalize the experience, and encourage others to do similar things.

For inspiration:

- [Bringing Biennial Home](#)
- [URJ Biennial](#)
- [Limmud Seattle](#)
- [4th Annual Great Big Challah Bake](#)

## **III. Invest in service learning as a tool to activate our values, repair the world and build relationships**

- a. Integrate service learning into youth programming.
- b. Create congregation-wide local opportunities for action infused with Jewish learning.
- c. Align service learning activities with annual learning theme.

For inspiration:

- [L'Taken Seminars](#)
- [Mitzvah Corps](#)

**IV. Assess the current model of the religious school**

- a. Engage diverse constituencies to get feedback on how current Religious School is meeting the needs of congregant families.
- b. Research existing alternative models of religious school to understand how those models might support our strategic goals.
- c. Create a pilot program to explore and assess alternative models.

**V. Continue integration between SEED and Religious School curricula**

- a. Identify areas of curriculum that could be changed to reflect TBA learning and rituals in order to create an onramp from SEED to TBA.

## **PRIORITY #4: SUSTAINABILITY: Together we will ensure the organizational sustainability of Temple Beth Am.**

*“Im ein kemach, ein Torah”* – without flour, there is no Torah. Temple Beth Am’s work over the next three years and beyond must balance implementing the strategic priorities laid out in this plan with ensuring financial security. In building the community we want to be part of, we will also build the community we want to support.

**Strategies to ensure the sustainability of Temple Beth Am:** We will adapt the infrastructure, policies, and procedures of our synagogue to become excellent stewards of our communal resources. This will entail making hard choices, taking on only as much as we can realistically support, possibly leaving behind longstanding programs that no longer align with our current priorities. We will plan for the long-term financial health of Temple Beth Am in addition to focusing on funding for the current fiscal year.

- I. Incorporate long-term financial sustainability into the budgeting process.**
- II. Embrace a culture of shared responsibility that inspires board, staff, lay leaders, and congregants to be mutually accountable to each other in achieving Temple Beth Am’s goals.**
  - a. Employ community organizing and community building principles to help congregants contribute (time, energy, wisdom and/or money) to shared goals to increase buy-in and commitment.<sup>4</sup>
  - b. Invest in professional development for staff, board, and other lay leaders around community organizing, volunteer management, leadership development, and network weaving (helping connect the right people purposefully with one another to build relationships to accomplish the work of this plan).
- III. Create a culture of philanthropy built on relationships**
  - a. Educate congregants and staff about philanthropy and the impact of different types of gifts (e.g., general vs. restricted; operating vs. endowment).
  - b. Develop legacy giving program

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<sup>4</sup> We know that sometimes this is less efficient in the moment, but stronger in the long term, and makes use of our staff in different ways as organizers in addition to being do-ers.

For inspiration:

- [Grinspoon Foundation Life & Legacy program](#)
- c. Focus on donor stewardship
- d. Use data to help understand donor interests and giving patterns.

**IV. Review and evaluate congregational dues system to express the meaning and value of membership for the 21st century**

- a. Research other dues models
- b. Engage members in conversations about the meaning and value of membership that will build a much more sustainable funding model.
- c. Increase transparency of TBA financial status

For inspiration:

- [Connections, Cultivation and Commitment: New Insights on Voluntary Dues](#)

**V. Be a responsible steward of communal resources by ensuring timely facilities maintenance**

- a. Update facilities plan and develop a timeline and associated costs to catch up on deferred maintenance
- b. Budget adequately to keep current with maintenance needs
- c. Develop a capital plan for maintenance and replacement of facilities and equipment and explore ways to adequately fund the plan on an annual basis

**VI. Protect our community from potential financial crises by building a three to six month operating reserve fund**

- a. Executive Director and Board work together to develop a long-term plan to fund the reserves.

**PRIORITY #5: TRANSPARENCY: Together we will increase transparency and effective communications to provide information, solicit feedback, and deepen engagement with congregants.**

The Book of Proverbs teaches that “Truthful speech abides forever.” (Prov. 12:19) A synagogue is based on relationships of trust where individuals know they can rely on the information they receive and feel confident that they can engage in honest conversations when clarification is needed. In order to enhance our relationships, and therefore strengthen our community, we must effectively engage in open and ongoing critical conversations.

**Strategies to increase transparency:** We will model transparency by engaging the congregation in ongoing conversation about the progress of this plan. We will have frank and open discussions with congregants about Temple Beth Am’s finances and the costs of running the synagogue sustainably. We will communicate clearly with congregants about our sources of revenue and the impact of their continuing support. We will ensure that communications regarding other aspects of congregational life are also conveyed with clarity, maintaining opportunities for asking questions and for open dialogue.

**I. Increase transparency and accountability in operations and governance.**

- a. Simplify our financial reporting to make it easier to understand.
- b. Regularly review and update internal controls policies.
- c. Give staff more responsibility for monitoring departmental expenditures.
- d. Make board minutes, budgets, and other relevant information more easily accessible to congregants.
- e. Clarify who is responsible for which decisions.

**II. Use mission-driven budgeting to ensure that the budget is an accurate financial representation of our values and priorities.**

- a. Review staff compensation and benefits to ensure that these accurately reflect our values.

**III. Develop a strategic communications plan.**

- a. Clarify the roles and value of each current communication medium (e.g., eHapps, Bulletin, web site, e-mail, etc.) and explore new methods of communication to better meet congregants’ needs.

- IV. Develop roles and clarify authority for decision making authority between staff, board and congregation, and clarify how to identify and navigate any grey zones.**

**PRIORITY #6: ADAPTABILITY: Together we will create an organizational structure that is nimble, responsive, collaborative, and values-driven.**

We will focus on becoming more agile so that we learn how to successfully navigate the changes that will inevitably come over the next decades. We will keep the mission in mind and create a culture of experimentation that enables us to learn fearlessly.

**Strategies for becoming a more nimble, responsive, and adaptable organization:**

**I. Provide resources to enable staff, board, and lay leaders to stay abreast of current trends and best practices, and foster the sharing of this information.**

- a. Invest in professional development opportunities for staff.
- b. Allocate time to ongoing board learning.
- c. Conduct an annual board assessment
- d. Develop a pipeline of lay leaders.

**II. Integrate teens and young adults into the leadership structure of the synagogue.**

- a. Explore ways to create ties between BATY and other synagogue leadership (board and committees).
- b. Recruit young adults into the leadership pipeline.

**III. Increase capacity to more effectively lead and govern TBA**

- a. Strengthen leadership pipeline by providing training in governance and adaptive leadership for current and prospective lay leaders.

For inspiration:

- [Network Weaving URJ Social Media Boot Camp](#)

- b. Update board skills and characteristics matrix annually, and use the matrix to guide recruitment of future board members and development of lay leadership pipeline.
- c. Conduct annual board assessments and develop and implement annual board training plan accordingly.

- d. Work with committees and groups to create charters and workplans that are aligned with strategic plan, provide resources accordingly. Clarify reporting relationships and expectations.

**IV. Develop and strengthen staff capacity to implement this strategic plan.**

- a. Review staffing structure to align positions and functions with the strategic plan.
- b. Provide ongoing professional development for staff.
- c. Enable staff to develop annual workplans that are aligned with the strategic plan.
- d. Provide ongoing support and feedback to staff and conduct annual performance assessments that are aligned with workplans, mission, and organizational values, including the importance of innovation and experimentation.
- e. Develop shared leadership model for Senior Rabbi and Executive Director.

**V. Employ technology to make informational resources available to staff and congregants who are interested in deepening their knowledge of issues facing congregations and the Jewish community.**

For inspiration:

- [Data Maturity for Synagogues :Incorporating Data into the Decision-Making culture \(from Idealware and UJA Federation of NY\)](#)

**VI. Develop new measures of success, both subjective and objective, to gauge how well we are increasing connection and a sense of meaning.**

For inspiration:

- [Measures of Success](#)