

# TEMPLE BETH AM STRATEGIC PLAN: 2017-20

## Annual Meeting May 21, 2017: Comments on the Plan Framework

### PART I. VISION, MISSION AND VALUES

#### VISION

##### INSPIRING LIVES AND HEALING THE WORLD THROUGH POWERFUL JEWISH EXPERIENCES – 1 CHECK

###### Comments:

- ✓ Love idea of “Healing the World” during next 3 years (given current US administration)
- ✓ Vision might include something about Jewish life cycle – e.g. provide inspiration, meaning and comfort throughout Jewish lifetime (? Hard to read word)
- ✓ Tikkun Olam starts with us – do we have crucial (hard to read word) conversations or just stay silent?

#### MISSION

##### WE DEEPEN RELATIONSHIPS TO JUDAISM AND EACH OTHER THROUGH WORSHIP, LEARNING AND ACTS OF LOVING KINDNESS.- 1 CHECK, 1 HEART

###### Comments:

- ✓ Loving kindness – a good goal
- ✓ Love it
- ✓ Love “deepening relationships” language
- ✓ Like the current one better – less pretentious wording
- ✓ Might add to Mission: “We deepen relationships etc “through shared experience”
- ✓ Does this fit in or in any way counter any URJ mission?

#### FOUNDING PRINCIPLES – THERE WAS CONFUSION, PEOPLE SAID:

##### Approved by the Board of Trustees on May 12, 1966.

- ✓ Inform people what Founding Principles were!
- ✓ This is already good
- ✓ Perhaps add to/tweak descriptions, but Founding Principles are still excellent
- ✓ Founding Principles still relevant
- ✓ Does this really need to be replaced? Is the proposed better?

## VALUES – 2 CHECKS FOR EACH

- ✓ Love them
- ✓ Build on the past knowing that there are attributes that may seem unattainable but are worthy of pursuit. Religious, democratic, creative, relevant, learned, humility and humor
- ✓ The Founding Principles have proven to be a document that is timeless but also evokes a time in the Temple's life where community was less complex and more connected. Even humor was seen as a worthy attribute.
- ✓ Add a reference to creativity and community flexibility and re-inventing to serve our needs/goals

**Inclusive: We care for one another and welcome everyone into our community. We embrace diversity so that people feel seen and heard and everyone is invited to participate.**

- ✓ Clarify “diversity” – a word used a lot these days. Make sure it really means inclusion of all.
- ✓ Substitute “are seen” for “feel seen”
- ✓ Need work on “feel seen”
- ✓ Should specifically work with underserved (increased equity)
- ✓ Racial inclusion
- ✓ Economic diversity is a core value (history of carpet in the Social Hall) – addition: “very important”

**Genuine: We are real. We meet people where they are. We say what we mean, and we do what we say.**

- ✓ That's a good goal
- ✓ “Real” What does this mean?
- ✓ But are we as multi-generational as we should be

**Inspirational: We nourish mind, body, and soul to nurture lives of meaning and purpose. We cultivate kindness, we joyously celebrate, and we offer solace to heal pain.**

- ✓ Love this – 3 checks
- ✓ Good goal

**Intentional: We seek to make who we are and what we do count. Our actions are rooted in Jewish values, believing that we are all connected to something bigger than ourselves.**

- ✓ Please clarify core “Jewish values”

**Engaged: We are intellectually curious and enjoy learning. We get involved in issues that matter to us to make the world a better place. We take responsibility for the repair of the world.**

- ✓ We need to cultivate more adult learners
- ✓ We take responsibility for the repair of the world – need more emphasis on this
- ✓ Engagement with the land of Israel. This is a subject we often skirt.
- ✓ TBA should join other temples in being one of the sponsors of local events celebrating Israel.

## PART II. GOALS AND ACTION STRATEGIES

### A. SPIRITUAL LIFE AND LIFE CYCLE CARE

*We create meaningful Jewish experiences through lifecycle rituals, personal prayer, and public worship, helping individuals connect with something larger than themselves.*

#### Action Strategies

- **Worship: Provide a variety of opportunities for alternative worship experiences, both inside and outside the building.**
  - ✓ Awesome, inclusive! – 3 checks; 1 “good”
  - ✓ Meditative practice – connect with alternative prayer
  - ✓ Small spiritual sharing groups
    - **Pastoral Care**
      - ✓ Keep up the good work, including shiva minyans
      - ✓ Include larger community services; visiting members outside
      - ✓ Rabbis and Cantor have been so supportive!!
      - ✓ Rabbi Levine does a great job
      - ✓ The pastoral care is very important on an individual community basis
      - ✓ Create a class or structure for people who would like support/training to be Torah readers – 2 checks
        - **B’nai Mitzvah**
          - ✓ Get new people to have B’nai mitzvahs
          - ✓ Work on length of service – 2 hours Max – 1 check
          - ✓ Library – develop relationships; foster relationships to each other
            - **Caring Community**
              - ✓ Reimagine/revitalize Project Hineyni -3 checks, 1 heart
              - ✓ Expand!
              - ✓ Yes, very important (2 comments)
              - ✓ Outreach in community
              - ✓ Healing challahs – 6 checks
              - ✓ Lifecycle response team (shiva, new baby, etc.) – 8 checks
              - ✓ Expand on the life part
              - ✓ Regional gatherings – neighborhood – 2 checks
              - ✓ Meal deliveries; coordinator should ask about diet/food allergies/restrictions
              - ✓ Visiting the ill? – 1 check
              - ✓ Brown bag/Sunday morning discussions for seniors – 1 check
              - ✓ I can’t believe we don’t have a Meal Train for ill congregants. Let’s set it up! – 1 check
              - ✓ Have participation be expectation of TBA membership (Ex: bring meal once a year) – 2 checks
              - ✓ Can we have PH throughout Temple life – get more folks involved; systems for info database?
              - ✓ Volunteer via web links on weekly E-happs
              - ✓ Will there be a Task Force to reimagine P.H.? (Project Hinenyi)

- ✓ Think about creating care teams, especially for congregants dealing with longer-term issues, i.e. dementia, cancer, mental health crises
- ✓ Village concept for supporting aging in community – for info NEST or PNA Village
- ✓ Emergency preparedness. In a major disaster (like earthquake) community will look to Temple. Could be a community-building process.

## B. STRENGTHEN COMMUNITY CONNECTIONS AND ENGAGEMENT

*We cultivate relationships by bringing people together in a variety of settings to engage in the primary sacred acts of Judaism: learning, prayer/worship, acts of loving kindness.*

### Action Strategies

- **Shift Temple’s Culture to be more relationship-based – 3 checks**
  - ✓ Small group opportunity!
  - ✓ Provide opportunities to celebrate both achievements and challenges. Could be (?), Bema announcement, other forms of communication. Ex: New job/need work, scholarship award, new volunteer position, need a ride, help, etc. These are what many knew when word-of-mouth was all that was needed. A much bigger congregation can be a relationship-based community
  - ✓ What does this mean – 50% members no children – what are they already doing? – 1 check
  - ✓ (Comments: ?, ?, Yes, Yes)
  - ✓ Spaces for sharing personally how God is moving in our lives, deeper internal spiritual questions we’re wrestling with
- **Engage Volunteers All Aspects of Temple Life – 2 checks/1 Yes**
  - ✓ Volunteers were the base/core of TBA – yet so much of the individual resources are gone – how do we get folks back into the role of volunteering? Where do I fit?
  - ✓ Create a communication space where significant accomplishments of TBA members in communities outside of Temple can be shared. (Other than tributes page in the Bulletin)
  - ✓ Are there volunteer opportunities with SEED? – 1 check
  - ✓ Not enough outreach to harness our energy and creativity and talent – 1 check
  - ✓ Let’s feature committee works – monthly feature? – 1 check
  - ✓ Ask for more support by volunteers
  - ✓ Event set-up/clean-up is an overlooked bonding opportunity. “Make friends stacking chairs” decrease staff
  - ✓ Expand opportunities for learning, perhaps through the arts, community service projects for adults
- **Explore Temple’s Congregation to Learn More about who we are (interests, passions, and skills). Know our community better so we can better connect and engage people. – 4 checks**
  - ✓ Bulletin is top-down – need to return some “space” to members
  - ✓ Perhaps spotlight members in the Bulletin? – 2 checks
  - ✓ Zip code co-chairs?
  - ✓ When we get to Numbers in the Torah do an in-depth demographic survey of our members including their interests, skill sets, family connection to Judaism – 4 checks
  - ✓ Use Library as 3rd space – “check out people.” Game shows – What’s my Line?
  - ✓ This needs to be carefully done to respect privacy – 1 check

- ✓ Expense?
  - **Strengthen New Member Welcome and Orientation to Increase a Sense of Belonging – 4 checks/1 heart**
  - ✓ The key to feeling connected is to get involved/volunteer/travel with TBA, etc. How to get people to do this is the question. People are so shy and busy – so how to get them to take the first step? (3 Comments: Yes, Yes, Very Important)
  - ✓ Create cohorts! Make connections over time.
    - **Engage Young Families** -- Help preschool families feel more connected to each other and to the synagogue. (could also include SEED families)
    - ✓ Food is a good way to share and connect
    - ✓ Also intergenerational – i.e. seniors involved in SEED. Babysitting?
    - ✓ Young families may not have local family support and may welcome contact with seniors
    - ✓ Connections for Madrichim families?
  - **Engage School-Age Families -- Religious School Parent and Children Connections. Help Religious School families feel more connected to each other and to the synagogue -1 check/1 heart**
  - ✓ Engagement for parents with kids aging out of Religious School – 1 check
  - ✓ BAPA works on this. More advertisement and/or Temple support?!
  - ✓ Older folks and empty nesters – 6 checks (??)
  - **Create Cohort-based and Affinity-based groups that have shared interests - - 9 checks**
  - ✓ Let's get Shabbat supper clubs going again please! – 2 checks
  - ✓ And not just for welcoming new members. Maybe some at Shul before 8 pm services. – 3 checks
  - ✓ Neighborhood-based (dinner groups) would be a plus - 3 checks
  - ✓ Cohort-based Shabbat dinner – 2 checks
  - ✓ I miss having a community Seder.
  - ✓ Host topical online salons, then meet ups
  - ✓ Network small groups for larger agendas; learning, social action, financing and giving
  - **Support Small Group Opportunities to Create a sense of intimacy within the larger community – 13 checks**
  - ✓ Inventory Congregation RE desire for issues/affinity groups – 3 checks
  - ✓ Havurah groups help build community – 5 checks
  - ✓ Shabbat dinners at home – with several families. Yes may affect Friday night service attendance, but would strengthen TBA community – 2 checks
  - ✓ Create scale-based social justice cohorts – 1 check
  - ✓ More visibility in the greater community for social justice projects.
  - ✓ For young adults (w/o kids)
  - **Social Justice Community and Activities**
  - ✓ Need to consistently direct/encourage people into our existing committees or new ones – 1 check
  - ✓ Integrate social justice and worship and religious school education

- ✓ Tikkun Olan, social justice, social action – how does this integrate with overall engagement?
- ✓ How about an adult mitzvah day?
- ✓ Volunteer opportunities for youth
- ✓ Emphasize reaching out from Temple to larger community social justice groups
- ✓ Increase interaction with the Muslim community --1 check
- ✓ Book groups with other religious group(s)?
- **Enhance Intergenerational programming – 9 checks**
  - ✓ Creating a multi-generational family-like feeling
  - ✓ Leverage our members' knowledge for lectures and teaching – 1 check
  - ✓ Don't forget the broader community involvement – 1 check
- **Make Temple a Place Where Fun Happens – 1 check**
  - ✓ And where respect for elders, traditions are taught
  - ✓ Spaces for intimate spiritual conversations
- **Engage with Inactive Members – 4 checks**
  - ✓ And less active members
  - ✓ For inactive members, how do we know who they are, when they come, why they don't. Add sign-in sheet and program evaluation to our events. To help with this. – 1 check
  - ✓ Invite them in an individual, customized way – dinners are great
  - ✓ Instead of a top-down communication style -- how can we reach a more broad area of individuals? With technological communication
  - ✓ Have to be sensitive to some people not wanting to be contacted – 1 check

## C. NURTURING LIFELONG LEARNING AND JEWISH EDUCATION

*We transmit Jewish values and traditions through relevant, challenging, and diverse learning experiences for people of all ages.*

### Action Strategies

- **Lifelong Learning**
  - ✓ Teach adults about different religions too!
  - ✓ Talmud study – 1 check
  - ✓ Talmud study –do differently; some don't like this word by word
  - ✓ Meaningful movies
  - ✓ Small group study – Torah partners? Other?
  - ✓ Study group with Yes magazine – Positive Futures
  - ✓ TBA Reads – common book for all
  - ✓ Medieval/modern Jewish philosophers – 2 checks
  - ✓ Modern, more Hebrew
  - ✓ Library – more money, budget
  - ✓ Kabbalah
  - ✓ Yiddish

- ✓ Singing
  - ✓ Connection to the land of Israel
  - ✓ The word/country Israel is not on any board anywhere. Not mentioned once?!
  - ✓ Israeli dancing
  - ✓ Connecting with other ethnic and faith communities; mutual learning
  - ✓ Make these ongoing; i.e. book group
  - ✓ Connect with other Jewish movements to share learning – Orthodox, conservative, Reform
  - ✓ Continuing education on worldwide Jewish cultures and language!
  - ✓ Jewish ethics, including medical/end of life issues – 3 checks
  - ✓ Start a hiking group
  - ✓ Make a room that has blackout shades, good seats and technology (sound system; hard of hearing assist, etc.) for lectures/presentations for all levels of learning – 1 check
  - ✓ We need opportunities for serious adult learning – in addition to Torah study
  - ✓ A more in-depth Torah study maybe once a month, for a whole evening or Sunday afternoon, like 4 hours
  - ✓ More on: Sayings of the Fathers; Spinoza, modern Jewish philosophers; History of the Jews [ancient – up to destruction of Temple in Jerusalem; during early Christianity; relationship to Muslims; during Rome; from fall of Rome to Renaissance; Jewish mysticism; impact of Reformation on Judaism; modern history (development of Reform, etc)] – 1 comment: Concur with all
  - ✓ More emphasis on adult learning and bringing outside scholars into the community
  - ✓ Recognize that elder members are important components in Congregational learning and teaching – 3 checks
  - ✓ Agree on dues sliding scale especially for senior. What about offering to volunteer to help cover operations costs?
  - ✓ Congregation should not vote on the budget – that is the Board’s job
  - ✓ Add film library
  - ✓ Theme night social event
- **Youth Learning**
  - ✓ Engage youth more – do not show movies! Meet youth where their interests are. 2 checks
  - ✓ Cooking classes for youth
  - ✓ Yes – teach cooking – 1 check
- **Religious School. Reinvigorate the Religious School curriculum to meet the needs of 21st Century families.**
  - ✓ Teach generational values – wisdom and respect
  - ✓ Provide support (curricula, training) to teachers – 3 checks
  - ✓ Also for Madrichim and parents
  - ✓ Mixed age discussion groups – 1 check
- **Youth Engagement**
  - ✓ Help find youth opportunities to volunteer – not just in Seattle – 2 checks
  - ✓ Involve “alum” kids in college
  - ✓ Create more youth-focused and led services

- ✓ Consider Youth Religious School Board to offer engagement and leadership for youth and Religious School
- ✓ Think about developing pipeline to 20-something members and engagement

- **Travel for Learning and Community-Building – 3 check**

- ✓ Don't forget learning about the community beyond your Jewish community
- ✓ More frequent trips to Israel
- ✓ More frequent trips to other places with Jewish history/connection – 3 checks
- ✓ Ask travelers to “report back” to community with impressions – not all of us can travel
- ✓ More trips – Yes!

- **SEED**

- ✓ Allow elders to volunteer (story tellers, book readers) – 5 checks
- ✓ Provide intergenerational opportunities
- ✓ More education – ongoing about relationship between TBA and SEED – opportunities for multigenerational, tzedakah
- ✓ Library – 2 checks, 1 heart

## **D COMMUNICATIONS AND TECHNOLOGY**

***Create a culture of transparency and engagement by communicating clearly, consistently and effectively with our members***

- ✓ Need more transparency
- ✓ Institutional memory – how to maintain, coordinate and get the right people together to help – provide access

### **Action Strategies**

- **Develop a Strategic Communications Plan – 1 check**

- ✓ Communication between committees and members (not just top-down) – 6 checks
- ✓ Personalize communication by interest areas
- ✓ Board representation from most committees
- ✓ We need a “new initiative implementation” group or coordinator to make these great ideas Launch and Happen

- **Improve transparency of financial information – 13 checks**

- ✓ Absolutely. Earlier meeting interactive, not fed to us as a done deal.
- ✓ Please provide feedback on status of each fundraising effort/ Also please identify goals for each effort.
- ✓ 2 disagree. Access to financials yes, but this is work one delegates to a BOD.
- ✓ What does my commitment support – short-term/long term

- **Storytelling: Create a culture of storytelling, sharing and Celebration**

- ✓ Storytelling – Absolutely! Start with members here for a while and also spotlight story and photo of new members to be archived for sure!
- ✓ Yes! Hear more member stories!



- ✓ Get members to author articles in Bulletin. Either a personal story or a “from where I sit” or??
- ✓ Reactivate library as a center of learning. 3 checks
- ✓ Yes and fund it. Update its tech
  - **Technology Systems for Connection and Efficiency – 4 checks**
  - ✓ Yes
  - ✓ Yes, but be careful not to switch over to electronic communication and forget personal meetings -- - 2 checks
  - ✓ Yes, but be careful not to abandon hard copy entirely – 1 check
  - ✓ Careful not to make technology a solution for strategic and tactical shortcomings. Solve tech last. 1 check
  - ✓ Chaverware is inconsistent and flawed – need improved system.
  - ✓ Use technology for live streaming services for the sick and or in nursing homes. Archive education programs. Secure licensing!

## E. ENSURING FINANCIAL SUSTAINABILITY

*Achieve financial sustainability to help TBA thrive now and in the future*

### Action Strategies

- ✓ Financial Culture and Management: Transparency and Accountability – 3 checks
- ✓ Spend based on what we actually have
- ✓ Balance the budget every year! – 1 check
- ✓ No more “make it sound ok” – honesty about \$
- ✓ Policies – documentation, access, continuity
- ✓ Budget process needs to get input from members committees. It’s too top down.
  - **Continue to Reflect Costs in the Dues Model to Ensure Sustainability**
  - ✓ Be very clear about what it really costs to do everything here!
  - ✓ How much does it cost per member?
  - ✓ Agree on dues sliding scale, especially for seniors
  - ✓ Back to sliding scale
  - ✓ Change “dues” to annual commitment – 4 checks
  - ✓ Review all families on dues adjustment annually.
  - ✓ Move outside of the retired or soon to be retired members to solicit donations/gifts
  - ✓ Recognize the constraints of those of us on fixed incomes with no COLA-- 1 check
- **Nachshon Campaign -- “Retire the Debt”**
  - ✓ Make this more visible – 1 check
  - ✓ Fundraising and the Development Committee
  - ✓ Fiscal sustainability
  - ✓ Need more volunteers, organization of this – 2 checks
  - ✓ Need more creative fundraisers to appeal to more types of congregants – 3 checks
  - ✓ Yes! Gala is not appealing to all

- **Build a Culture of Philanthropy based on Relationships – 2 checks**

- ✓ Yes!
- ✓ Build on small group discussions
- ✓ Encourage more volunteerism – leads to relationship building
- ✓ Ask!!
- ✓ Planned giving – 100 members are over age 80 – no time to waste! – 4 checks
- ✓ Yes! (2x)
- ✓ Workshop to explain concepts of tax and long-term planned giving
- ✓ Frame giving to Temple as more immediate and vital than all the other places that view for money
- ✓ Grow the endowment
- ✓ Emphasizing engagement with larger community needs

## F. GOVERNANCE AND LEADERSHIP

*Develop a pipeline of skilled lay leaders and staff to guide TBA to successful future (1 Check)*

### Action Strategies

- **Collect and Use Data Collection to Inform Decision-making – 5 checks**

- ✓ Very important – evaluate and recalibrate regularly
- ✓ Privacy
- ✓ Good metrics RE: engagement.

- **Permanent Executive Director Search**

- ✓ Initiate search
- ✓ Or how long can we keep an “interim”?
- ✓ Keep Barbara! – 8 checks
- ✓ Clarity on function of ED – Role and Responsibility re member relations, finance.
- ✓ Hire a permanent Executive Director who deeply understands that their role is to support Rabbi Ruth’s vision. The balance between ED and senior Rabbi is critical and has not been “right” for many years (maybe ever!)

- **Financial oversight – 5 checks**

- ✓ Policy documentation and access

- **Board Development [and Committees]– 3 checks**

- ✓ Clarify responsibilities, expectations and process – 2 - checks
- ✓ Get more governance rock stars on the BOD
- ✓ Attend classes/seminars from URJ and other resources
- ✓ Let’s reach out beyond the “usual suspects” for Board membership. What about a “pre-Board” development program.
- ✓ Recruit board members with prior board experience and expertise in board governance
- ✓ Provide training for board leadership if necessary

- ✓ Big need for more transparency – what about Board minutes?
- ✓ More Board interaction with Committees
- ✓ A lot of various TBA committees – overlapping goals?! Can consolidate for better results. Does left hand know what right hand is doing? -- 2 checks
- ✓ Strengthen Committee structure. Have a leadership development program to put chairs in Board pipeline and move committee members into Chair positions
- ✓ Gestalt meaning data and gut – work with feelings as well
- ✓ We need more attention to maintaining and /or organizing access to institutional history – where we came from, policies, institutional memory – this overlaps with different areas

- **Lay leadership recruitment and development – 4 checks and 1 heart**

- ✓ Start by asking people to lead specific things
- ✓ Or participate on committees/projects
- ✓ Invest in a leadership development program to create a cohort of leaders
- ✓ Needs to be easier to find out how to get in – only happened for me because I personally knew gatekeepers – How about a tab on the website?
- ✓ Big need here. Sense that there is a cabal. Not open to new blood.
- ✓ Tying through relationship of committee leadership to Board leadership

- **Staffing**

- ✓ Do we need a different staff configuration to meet member needs – do we know
- ✓ !!!
- ✓ Talk to staff – Listen to their ideas.

#### **ADDITIONAL COMMENTS**

- ✓ May I suggest a nurse on the staff? Confidential. Goes with Rabbi/Cantor on Bikur Holim trips. Takes time with caregiver. Called Parish Nurse in some Christian congregations. Good idea!
- ✓ Strategic planning for library – learning, engagement, etc. Interested? Ad hoc committee forming, call Toby or email
- ✓ Finance the library
- ✓ Control the library advocates; it is one program of many! 1 check
- ✓ The Plan needs to be extended to 2021 as it won't come out until 2017 is 2/3 over
- ✓ Please cultivate a respect for our elders and for the infirmed. At post-Bar Mitzvot Onegs, teenagers are first in line, while the elders are at the very end (or worse, sitting in the lobby waiting for the line to go down.) The teens are finished eating before the elders get anything at all. This is of course a problem in itself, but it is also a manifestation of a much larger attitude of lack of respect...L.L. Karp
- ✓ Comments on Today's Process: We did not have time to think. Recommendation: provide in advance so we can reflect. Good first step – having a budget meeting early, but it was not interactive – needs to be

### **PART III. IMPLEMENTATION AND MONITORING PLAN**

- ✓ Love the entire strategic planning process – Bravo!
- ✓ Action steps clearly communicated – keep things moving!