



KMS Strategic Planning

June 11, 2018 Board Meeting



Strategic Planning Process - Mission



Our mission is defined by the original principles on which KMS was founded:

- Serious and Inspiring Communal Tefilla
- Sophisticated Limmud Torah
- Service to KMS and the Community
- Commitment to Youth
- Commitment to the State of Israel

The objective of the strategic planning process is not to revise these founding principles of KMS, but to reflect them throughout the strategic plan.



Strategic Planning Process - Vision



The vision statement developed by the Strategic Planning Committee reflects the founding principles of the synagogue. The vision statement is intended to reflect those aspects of the synagogue on which KMS will focus its energy and resources over the intermediate term.



Our Strategic Plan will build upon the defining characteristics of KMS and ensure that it is a place that inspires and uplifts us.

WE WILL FOCUS ON:

Engagement

We will ignite a passion in people to feel like they are part of a family in which individuals of all ages are valued, appreciated, and recognized.

Warmth

We will be welcoming and friendly to the shul's long-standing members, newer members, and visitors alike.

Religious Growth

We will rise together and grow as a community, in Torah, and Jewish life.

Financial Sustainability & Improved Physical Spaces

We will create financial security and enhance the physical spaces that we share together.



Strategic Planning Process - Goals



Task Force	Goals
Social & Cultural	<p>Make KMS a warm, welcoming environment.</p> <ul style="list-style-type: none"> -Improve quality and quantity of initial and ongoing social interactions with visitors and new members. -Increase community involvement and integration.
Spiritual	<p>Increase general ritual knowledge and observance.</p> <ul style="list-style-type: none"> -Increase Torah knowledge. -Increase participation in davening. -Enhance experience and decorum of all minyanim.
Youth	<p>Meet growing demand for quality youth services and programming.</p> <ul style="list-style-type: none"> -Improve quality of youth minyan experience. -Improve quality and quantity of activity programming offered -Integrate youth with rest of shul -Expand programming to include underserved segments.
Leadership	<p>Provide for strong Rabbinic and lay leadership underpinned by well developed institutional memory.</p> <ul style="list-style-type: none"> -Attract, manage, train, and retain quality staff. -Maintain stability of operations during periods of leadership transition. -Attract and mentor qualified future volunteers and leaders.
Development	<p>Fund expanding operating budget.</p> <ul style="list-style-type: none"> -Create gameplan to meet funding needs of KMS over next five years -Optimize dues structure to maximize due income.



Process Update



- Over 50 volunteers stepped forward or were recruited for the five Task Forces and four Support Teams assuring a cross section of the synagogue has representation in the planning process
- All Task Forces had initial meetings in April or May to brainstorm and collect ideas for achieving their assigned goals and reported back meeting results to the Coordination Team
- The Volunteer Support Team met to review individual task force meeting results and begin an assessment of overall volunteer needs and creating a survey
- The Facilities Support Team met to begin reviewing space needs
- The Coordination Team met to synthesize recommendations between the various Task Forces
- **The Leadership, Social, Youth, and Spiritual Task Forces came up with recommendations to accomplish the strategic goals.**



Recommendations



Recommendation	Originating Task Force(s)
Improve quality, quantity and focus of youth programming	Youth Social
Increased social programming	Social
Create Volunteer Corps	Social Leadership Youth
Broaden volunteerism	Leadership Social
New member on-boarding	Social
Optimize office staffing	Leadership Social



Recommendations - continued



Recommendation	Originating Task Force(s)
Review bylaws related to board structure and term limits	Leadership
Restructure gabbai system	Spiritual
Work on davening experience at 8:45minyan being more consistent and more spiritually uplifting	Spiritual
Branding 8:45 minyan as a place of both decorum and welcoming to children	Spiritual Youth
Gauge member interest in minyanim	Spiritual
Enhance learning and spiritual programming	Spiritual
Begin process of evaluating our space needs	Leadership Youth Social



Recommendation: Improve quality, quantity and focus of youth programming

Goals: engaging young families, leadership skills for teens, integrate youth with the rest of the shul, improve youth minyan experience

Staffing

- Hire Youth Director (Y)
- Visits to area day schools (Y)

Programming

- Restructure/reenergize Shabbat groups and Bnei Akiva (Y)
- Institutionalize youth programs for all holidays (Y)
- Engaging after school activities (Y)
- More activities for younger kids on Shabbat afternoons (Y)
- Improve youth minyan kiddush food (Y)

Leadership

- Refresher course for davening/layning and assistance with divrei Torah (youth minyan and women's tefilla) (Y)
- Mentoring program for younger kids/older kids in Youth Minyan (Y)
- Create and manage GoogleDoc for youth minyan aliyot and honors for entire calendar year (Y)
- Restructure youth leadership board to make it more effective (Y)

Integration

- Engage the teens as active participants and volunteers in all areas – davening, chesed, social (Y,So)
- Selected times of the year when the ruach minyan moves to the sanctuary (Y)

Resources: money, space, volunteers, office support



Recommendation: Increased social programming

Goals: warmth, engagement, social connection, and attracting and integrating new members

Execution

- Create culture of positive interactions for volunteers to create, lead and run events (So)
- Institutionalize a calendar of social events (So)
- Software that eases scheduling and avoiding conflicts (So)

Diversification

- Provide programs at different price points – free, suggested donation, cover cost, fundraiser (So)
- Provide more social action programming (So)
- Increase social activities for special interest groups (So)
- Run programs for specific demographics and cross-demographics (So)
- New member events every year (So)

Resources: money, volunteers, office support





Recommendation: Create Volunteer Corps

Goals: Free up VPs to think strategically, ensure consistency/continuity/quality of programs, increase volunteerism, create a portal of entry and socialization of new members

We are creating a system of lay leaders who would be the set people, not on the Excomm, who would be responsible for running their same event year to year. This consistency will allow them to run events with more ease and less effort and ensure a consistency of programming and services in KMS. This will hopefully free up the VPs to think more broadly and strategically about the year as a whole and plan for other ad hoc event and programs.

We already utilize this model when it comes to HH. Our HH planning is done by a team with one leader who is not a VP. That leader sees through all HH plans from A-Z working with all relevant VPs, committees and volunteers from gabbaim, to ritual, to seating chart, to ordering chairs and tents, to youth, to childcare, to website and sign up to appeals and so much more.

We also have a similar model when it comes to Shiva. Our shiva team led by Richard Dine who is not a VP takes care of all needs A-Z. They take care of appointing people to set up the shiva house, to arrange meals, to get emails out to KMS members and provide minyanim and learning of Mishna etc. These lay leaders don't change every time the board changes and can take a big chunk on planning off the hands of the VP of Ritual.

Resources: volunteers





Recommendation: Create Volunteer Corps, continued

We want to expand this model to other programs as well. One example of this would be Shavuot. Planning for Shavuot takes a tremendous amount of time and focus for the Rabbi, the office, and the VPs of Youth, Kehilla and Limud Tora. In addition to all of that there is a lot of food to be purchased and set up at night and during the day and a lot of PR material to be crafted.

The team leader would oversee the operation as a whole from A-Z and would have documents detailing what needs to be done year to year so they don't have to reinvent the wheel each time. Other examples of leaders that will be appointed: Yom Haatzmaut, Chesed events, new member events, Gala Dinners, kiddush, Rosh Chodesh women's events, spirits, etc.

The easier these things become, the more smoothly they will run, the less time they will take, the more volunteers we will get to work on them, the less burnout we will have, the more time the leader will have to tweak and improve the program from year to year and the more the VPs will have the time to think long term and big picture.

These team leaders would be led and be overseen by the heads of the Volunteers Corps. It would be their job to ensure that the leaders are staying on calendar and on task and on budget. They can also think of new ideas and generate new programs as well. Of course, each team leader as well as the heads of the Volunteer Corps would work closely with the VPs relevant to their programs. The heads of the Volunteer Corps would be ex-officio on the board.

The second goal of the volunteer corps is to create and actively recruit a pool of volunteers that can be called upon to help with tasks that come up during the year. The heads of the Volunteer Corps would manage the pool having a sense of who likes to work on what and any VP could contact these heads and tell them they need support for a program. The heads would act as the communication channel from the shul to its volunteers.





Recommendation: Broaden volunteerism

Goals: More help with programs, more people engaged with a sense of ownership of the shul, creating smaller social networks and more portals of entry

Recruitment

- More open calls for volunteers and increase publicity of volunteer opportunities (So,L)
- Targeted outreach to solicit areas of volunteer interest (So)

Retention

- Consistent appreciation mechanisms (So,L)
 - i.e. Volunteer Shabbat – highlight contributions and say thank you (So)
- Establish a network of ambassadors (So,L)

Resources: volunteers, office support





Recommendation: New member on-boarding

Goals: Engaging young families, Leadership skills for teens, integrate youth with the rest of the shul, improve youth minyan experience

Initial

- Welcome packet (So)
- Revised membership application (So,L)

On-going

- Establish a network of ambassadors (So,L)
- Yearly new member lunch (So)
- Active hospitality committee (So)

Resources: money, volunteers, office support



Recommendation: Optimize office staffing

Goals: ease burden on VPs, proactive building maintenance, streamline operations, satisfy member needs

Research

- Gather information on best practices from other synagogues on how they are staffed (L)
- Perform skills assessment of current office staff to see what they are currently capable of doing (L)
- Interview ExComm to determine what support they need/want from office staff (L)

Communication

- Create culture of positive interactions for volunteers to create, lead and run events (L,So)
- Better leverage social media channels to complement email communications (So)

Processes

- Create Standard Operating Procedures (L,So)
- Preserve all documentation (L)
- Modify membership applications to capture info on new members' skills and interests (L,So)

Resources: money, space, volunteers

Recommendation: Review bylaws related to board structure and term limits

Goals: Create consistency on the board, more targeted nominations, and allow for short-term and long-term planning

Roles

- Clearly articulate the role and responsibilities of the board (L)
- Define what we are looking for in each position – ExComm, Board, and committee chairs (L)
- Gather information on best practices (L)

Responsibilities

- Create institutional memory document for each VP (L)
- Increase terms of lay leaders (L)

Resources: volunteers

Recommendation: Restructure gabbai system

Goals: More consistency, more spiritually uplifting davening, more welcoming atmosphere

Warmth

- Appointing ambassadors that can help with welcoming and with decorum (Sp,So)
- Engagement of more members in the minyan (Sp)

Infrastructure

- Create new gabbai system that is consistent, tighter, and more deliberate (Sp)
- Create goals for 8:45 minyan in terms of style, pace, etc. (Sp)
- Create new mechanism for leyning sign up (Sp)

Quality

- Enhance the quality of baaley tefilla and varying the style with forethought (Sp)
- Rabbi Weinberg to speak more often and other slots that are not RBW are deliberately picked (Sp)

Resources: volunteers

Recommendation: Branding 8:45 minyan as a place of both decorum and welcoming to children

Goals: Make it a place of decorum and welcoming children

Children

- Get a group of parents of kids in one grade to buy in to bringing their kids to 845 minyan each week for a designated time and agreeing to maintain the decorum of the davening (Sp,Y)
- If that works, try other grades of kids (Sp,Y)

Adults

- Work on increasing decorum among adults (Sp)

Resources: volunteers

Recommendations and Actions



Recommendation: Gauge member interest in minyanim

Goals: Increase participation in minyanim

Data

- Formal and informal survey of membership about participation in all minyanim (Sp)

Experimentation

- Trial of ruach minyan in sanctuary occasionally (Sp,Y)
- Trial of summer early and bizman minyanim in bet midrash (Sp)

Resources: volunteers



Recommendation: Enhance learning and spiritual programming

Goals: Foster a sense of religious growth and community

Learning

- Use Seuda Shlishit as a time for particular messaging and divrei torah especially from Rabbi (Sp)
- More shiurim about davening and text of siddur (Sp)
- Create an Open Beit Midrash - either weeknight or maybe shabbat day or both (Sp)

Rabbi

- Rabbi should speak more about religious growth and push people (Sp)
- Work on the Rabbi-Ritual committee dynamic making sure Rabbi is setting the spiritual course and that they are working as a team towards same goals (Sp)
- Trips that enhance spirituality like going to Israel Day Parade or Jewish sites and tours - not Poland but USA and some local (Sp)

Programming

- Try once a month a special Friday night minyan (i.e. Maccabeats style). This would combine ruach and non ruach minyan (Sp)
- Winter Friday night adult “tiches” with singing and divrei torah – themed (Sp)
- Friday night dinners (Sp)
- Create opportunities once or twice a year for the whole shul to daven together (Sp)

Resources: money, volunteers, office support



Recommendation: Begin process of evaluating our space needs

Goals: We hope over the next 3-5 year we will increase our programming and membership through the efforts of this strategic plan. We would like to be prepared in 3-5 years to renovate/increase our space to meet those needs. Architectural and financial planning must be done at this stage so that we are not caught unprepared.

- Youth Director needs an office (Y,L)
- Executive Director needs an office (L)
- Youth Minyan has outgrown the space (Y)
- Increase attendance of Shabbat youth groups (Y)
- Provide opportunities for social or social action events that involve cooking (So)
- Encourage younger children to attend groups rather than playing in the hallways or outside (Y)
- Create warm and welcoming environment with space for everyone (Y,So,L)
- Increase number of Shabbat dinners and lunches (So)

Resources: money, volunteers, office support



Next Steps



- Task Forces will review and expand upon approved recommendations and revisit tabled recommendations. Task Forces will work with VPs to work on implementation plans.
- Development Task Force, with assistance from Finance Support Team, will assess financial impact and funding requirements of approved recommendations and report back to Coordination Team
- Strategic Planning Committee will review revised recommendations
- A draft of the Strategic Plan will be circulated to the members for feedback
- The final Strategic Plan will be delivered to the ExComm and Board for approval



Supporting information



Coordination

This team is the interface between the Strategic Planning Committee, Task Forces, and other Support Teams. Its role is to monitor the activities of the Task Forces and provide assistance as needed, and obtain information and data as requested by each of the Task Forces and Support Teams. The Coordination team will merge the deliverables of each Task Force and the 5 year financial planning model prepared by the Finance Team into a draft master document. This team will present the draft plan to the Strategic Planning Committee for review and comment and present any feedback back to the Task Forces for consideration and revisions. This team will prepare a final draft incorporating any revisions from the Task Forces and deliver to the Strategic Planning Committee for final review and presentation to the KMS Board for approval.

Social & Community Task Force

This task force will work toward fostering i) a warm and welcoming social environment for members and visitors of all ages and ii) engagement by KMS members with the broader community. The task force will suggest a variety of social events and programs that will cut across demographic lines and may include activities that contribute to the betterment of the Jewish Community at large and the local broader community.





Spiritual Task Force

This task force will maintain KMS's commitment to spiritual growth in Judaism, Torah, and Jewish life. The task force is charged with taking a fresh look at the current learning, worshipping, and public speaking styles of its members and determine whether any adjustments might be made to better align current practices with the goal of continued spiritual growth.

Youth Task Force

Children under the age of 18 is estimated to account for 50%-60% of the population served by KMS. This task force is charged with identifying and suggesting responsive, relevant, and innovative programs and approaches to tefilla through the examination of the best practices and program successes of other communities.

Leadership Task Force

This task force will examine and determine the rabbinic, professional, and lay leadership needs and resources required to accomplish the action steps recommended by the other task forces. This task force will also seek ways to incorporate leadership and skills development training opportunities.





House & Grounds Support Team

This team will be the subject matter experts in the areas of optimizing space usage and identifying alternative solutions to space needs. They will engage with the task forces to identify their various requirements and determine how to best optimize within the current space configuration and through the timing of events. This team will translate this compiled information into a master space usage plan.

Finance Support Team

This team will be comprised of members of the KMS Finance Committee and will be charged with preparation and maintenance of a 5 year financial planning model. This will be based upon the synagogue's current budget and integrate the spending and revenue projections presented by each of the various task forces. This team will make this model available on an ongoing basis to the Development task force.





Development Task Force

This task force will ensure that the strategic plan works from a financial perspective. The basic planning tool for this task force will be a 5 year financial planning model prepared by the KMS Finance Committee with input from the other task forces and the Coordination Team. This task force i) examine current fundraising approaches and suggest refinements and ii) work with the other task forces to identify new fundraising opportunities.

Communications Support Team

This team will be subject matter experts in the areas of creating and disseminating information about our community and generating awareness of programming, fundraising initiatives, and community events. The team will be available to help the Task Forces identify and select the most effective communications tools to accomplish their desired goals.

Volunteer Support Team

This team will engage with the task forces to help determine the volunteer resources required to accomplish their stated goals. The team will act as a resource for best practices concerning the attraction, training, and retaining motivated volunteers.



