



Report of Strategic Planning Group

TEMPLE SHALOM

Report of Strategic Planning Group July 14, 2020

BACKGROUND

In the Spring of 2020, President Daryl Sissman convened a Strategic Planning Group, chaired by Howard Solot and Dave Rutstein and charged them with a focused assignment: Provide the Temple's leadership with a set of straightforward, practical and executable strategic initiatives and recommended action steps which will (1) increase the Temple's financial stability; and capacity to serve our members; (2) enhance the congregants' Temple experience and (3) strengthen the role of the Temple in the Jewish community.

She purposely defined them as a "Group" (and not a committee) to avoid confusion so as not to usurp any of the authority or functioning of existing Temple committees. Instead, the Group's work was intended to be additive to the current administration of the Temple. In addition to the Chairmen, President Sissman and Executive Director, Deborah Fidel, the members of the Group were Susan Hager, Elliot Kaplan, John Little, Pam Lundborg, Rabbi Adam Miller and Don Shapiro.

Once convened, the group resolved to conduct a serious, organized and inclusive process with open discussions designed to be constructive and action oriented. Instead of seeking to carefully craft the lofty words of a theoretical "Mission" or "Vision" Statement, the group undertook to focus on realistic recommendations which the Board of Trustees could implement relatively quickly to produce some early positive results. Like so many other activities, COVID-19 has prevented us from receiving organized and meaningful comments from congregants. After its adoption, we recommend that the Board make this Report readily accessible to the congregation. This document is dynamic. Our intention is to create an ongoing and "living" set of recommendations which can be adapted depending upon congregational acceptance and changed circumstances.

The recommendations which follow reflect the Group's work.

THE PANDEMIC—COVID-19

The Group did its work at a particularly challenging time—while the Covid-19 virus was raging. At the time of this writing, the virus has created so many variables that peering into the future—never easy—has become more difficult. As the reader will see, the virus has already had a significant impact on all of the subjects we will be discussing. And, in our view, the repercussions will increase over time. If there are reasons to readjust our thinking, we will reconvene and update our recommendations.

A SUMMARY OF OUR RECOMMENDATIONS

1. Conduct a detailed analysis of projected needs for space, staff, clergy and technology utilizing various assumed levels of growth during the next 3-5 years.
2. Carefully project, monitor and track the pledges received from congregants and develop a Contingency Plan if revenue falls short of projections.
3. Reinstitute the previously successful Mentoring Program and create a more formal Leadership Training Program and a Succession Plan, all designed to develop more effective and sustainable Board leadership.
4. Create more opportunities for connectivity among existing congregants with enhanced feedback from congregants and develop new methods of evaluating the effectiveness of Temple programs and events.
5. Conduct an organized outreach to current and potential members who live in Bonita Springs and Estero by conducting worship, educational and social activities in those communities.
6. Create new and ongoing opportunities for congregants to have face-to-face interactions with the clergy.
7. Approve the Crisis Management Plan.
8. Continue to conduct a “talent search” to learn more about the skills, expertise and experience of congregants to recruit them to assist the Temple as volunteers.
9. Review the Temple's educational curricula with an emphasis upon innovation and creativity which should include more distance learning.
10. Strengthen the role of the Temple in the Jewish community by stressing collaboration, partnering and cost-sharing.
11. Appoint an Action Group to implement these Strategic Initiatives and to assist in refining and improving existing programs.
12. Develop and utilize metrics to evaluate progress in achieving these strategic initiatives.

STRATEGIC PLANNING - A NEW PARADIGM

Seven years ago—the last time the Temple engaged in formal strategic planning—the goals to be achieved were quite different. The Temple had experienced steadily declining enrollment, and the principal objectives centered on rebuilding the member base. Since then the Temple's leadership wisely created the “One Family” concept resulting in greater connectivity and communication with congregants. More recently, the Board boldly converted the dues system to a pledge-based membership system, called L'Shalom. The census has gone from a low of 495 to a high of 780.

As we approached our work, we anticipated that we would seek to answer these important questions:

- Because all or most of the Temple's space is currently being utilized, what new space will be required to accommodate further growth?
- Should the Temple add new staff to serve the Temple's growing needs?
- Is the current ratio of clergy to congregants still workable?

Then Covid-19 came. Now we must answer some very different questions:

- Will the membership grow as projected?
- Will the aggregate amount of congregant pledges decline?
- Will the Above and Beyond fundraising initiative meet its goals?
- Can we retain members at sufficient levels?
- On the other hand, will more Jewish people with interest in the Temple move to Naples from larger urban areas?

UNCERTAINTY

That is perhaps the best word to describe our current challenge in trying to predict levels of revenue and expenses and the size of our membership in the next 3-5 years. The virus has simply created too many new variables.

So, we recommend: That the Board of Trustees now create a matrix based upon the best available current data projecting the Temple's needs for space, staff, clergy and technology at various assumed levels of membership size. The Board should then utilize that analysis as it makes future decisions.

A NOTE ABOUT STRATEGIC PLANNING

Have we reached a consensus as to which characteristics of our Temple are the most positive, and in turn, the most important for current and prospective members?

We suggest that agreement on those fundamental questions is a prerequisite for planning and forms the foundation upon which successful strategies can be built. Then we would be in the best position to attract new members and retain existing ones. So, we recommend that the Board identify:

1. Where we are strongest today.
2. Whether those elements are the ones which are most important to members.
3. Where we should make our most meaningful investments in the near term, and
4. How we can differentiate ourselves among Jewish institutions in Naples who seek to serve the same people.

The menu of potential choices is a long one. As a full -service Temple, we could choose among our programs of worship; education; pastoral outreach; social action; social interaction; music; our culture of gender equality and our inter-generational congregation. We might be tempted to say, “All of the Above”. But that would not be strategic planning. Effective planning requires choices. Those organizations which have the discipline to isolate a set of specific strategic initiatives—and then build the institution around those discrete elements---perform best in the long run. In fact, the best strategic planners often judge the worth of a plan on the basis of what the organization chose NOT to emphasize.

By using this framework, we will also be building “strength upon strength” in areas of demonstrated interest to our congregants. Our targeted activities would be aligned with our ability to perform. For each activity, we should ask ourselves a series of questions:

- WHAT should we do?
- WHEN should we do it?
- WHO is responsible and accountable to do it?
- WHAT RESOURCES do we need? and
- HOW will we communicate our strategy to our constituents?

THE IMPORTANCE OF THE PLEDGE SYSTEM

The Pledge System is the single most important element in achieving our revenue projections. Since inception, the average pledge has remained fairly constant. We do not yet know whether and to what degree congregants may soon choose to make pledges in lesser amounts.

We believe that the Board should stay ahead of this potential problem with real time information.

We recommend: That the Board carefully project and then closely monitor and track pledges (and collected amounts from pledges) received from congregants. Further, that the Board now develop a fundraising plan to be initiated if aggregate pledges significantly decline. That plan should include (1) communications with the congregation as to the importance of maintaining sufficient revenue; (2) creation of a set of persuasive talking points which (3) would also be used by a group of solicitors who would seek larger pledges from a select group of members.

LEADERSHIP DEVELOPMENT AND SUCCESSION

Temple Shalom, like all non-profit organizations, must continue to replenish its leadership group with new and properly motivated talent with the requisite skill sets and experience to face new challenges. All of the recommendations in this report will require dedicated and skillful leadership over time.

In 2013, the prior Strategic Planning Group recommended the creation of a Mentoring Program which proved to be very successful. Several current and former leaders of the Temple participated in that program.

It is time to repeat that program.

Briefly, those members of the congregation who have held important leadership positions (in or outside the Temple) should develop mentoring relationships with carefully selected members who are seen to have potential to become future leaders. On an informal basis, the mentors would take a personal interest in specific individuals by getting to know them and slowly over time encouraging them to expand their Temple participation. The mentors would be mindful of the time constraints being faced by the participants who are in

the process of building careers and their families. The mentors would seek to build connections with the Temple so that when the participants are ready to turn their attention to charitable endeavors, they would volunteer their time and talent to Temple Shalom.

Separately, on a more formal and structured basis, the Board should create a Leadership Training Program open to all-- with modules on many facets of the Temple's history and operations. This program would have the same objective: to develop a cadre of new Temple leaders.

We recommend: That the Board create a Mentoring Program and a Leadership Training Program, both designed to enhance leadership succession. The Board should seek to create a "Leadership Ladder" by which Board members acquire knowledge and experience on their way to serving in top Board roles.

MEMBERSHIP RETENTION

Membership at Temple Shalom continues to grow and stands at 868 members as of the end of June 2020.

The launch of the One Family initiative and the pledge based financial model resulted in an escalating influx of new members: 172 in 2018, 98 in 2019, and 87 to date in 2020. This growth was somewhat offset by resignations and deaths for a net change of +154 in 2018, +61 in 2019 and +62 to date in 2020.

All new members are warmly welcomed into the Congregation with wine and cheese reception, a welcome dinner, an opportunity to meet the Rabbis and Cantor, be blessed on the Bima, and be connected with a Havurah, the Sisterhood, Men's Club or one of the numerous volunteer opportunities at Temple.

Bobbie Katz, with help from other volunteers, has done a tremendous job welcoming newcomers. Additional volunteer resources, including members representing the diverse demographics of the congregation, are needed for the committee to continue this important work. It is recommended that the Board support the Membership Committee's efforts to recruit and welcome new members as well as retain them.

Keeping a large and growing group of members engaged is a challenge to meet their spiritual, educational and programmatic needs and interests. Their active participation in Temple life will depend on what we do once they are past their initial welcome period.

To support the already successful new member initiatives, we recommend that the Board take a leadership role in retention through their visibility and efforts to make personal connections with members at services and Temple events. We recommend that the Board and Membership Committee also consider complementary activities that build connections among members as well as retain members. A few suggestions:

- Have the Board make semi-annual outreach calls to new member(s)/families starting at the end of their first 6 months and sharing the results with the rest of the Board, Membership Committee, and clergy.
- Provide frequent opportunities for feedback on the membership experience and participation in Temple classes and other activities.
- Focus on what is needed to keep families involved following a lifecycle event such as a b'nai mitzvah, confirmation, wedding or baby naming.
- Continue to look for new ways to offer religious school families the opportunity to connect with the clergy, other Temple members, and events.
- Include an opportunity for members to meet and get to know one another at every meeting, event, program, or service, for example, the "greet your neighbor" break during Shabbat services. These

socialization opportunities should also include encouraging members to wear their name tags, starting off all meetings with introductions, and utilizing breakout groups whenever possible.

- Develop a plan for 3-4 congregational dinners with a post dinner program throughout the year and ensuring that Board and Membership Committee members are seated amongst the tables.
- Building on the success of the online offerings during the pandemic, continue to encourage a focus beyond the Temple building for services, programs, and activities including Lee as well as Collier County.

BONITA SPRINGS AND ESTERO

A Proposition: The Temple should conduct a targeted outreach to the Jewish residents of Bonita Springs and Estero.

What We Know: In the last two decades there has been a dramatic increase in the population of those communities.

Lee County planners project significant future population increases there in the next decade. As the Greater Naples community has grown, vehicular traffic has materially increased; residents are less willing to drive long distances.

What We Don't Know: The belief that the Jewish population in Southern Lee County has significantly increased is based only on anecdotal evidence; there is no in-depth current data.

Rather than engage in an academic debate as to whether those communities are underserved, we believe that the Board might want to consider doing the following:

1. Consult with Temple members who live there to seek their opinions.
2. Arrange for those same Temple members to introduce their friends to the Temple. Networking can be effective.
3. Conduct worship, educational, social and "life cycle" events and programs there to test the level of interest among those residents.

We recommend: That the Board engage in due diligence to determine whether there should be a special initiative to attract new members and to retain current members who live in Bonita Springs and Estero

THE CLERGY'S ROLE

It is well accepted that in any Jewish congregation the Clergy becomes collectively the "public face" of the institution. Many congregants welcome (and actively seek) "face time" with the Cantor and the Rabbi's. Anecdotally, attendance at events and programs increases when one or more members of the clergy are expected to attend. Active participation by Rabbi Miller and Cantor Azu materially added to the success of the One Family campaign. The question is not whether we should strive to achieve more personal interaction, but how?

When Rabbi Miller first arrived, he conducted a series of informal visits with his new congregants in members' homes. Those introductions were very successful. They have not been held since on a regular basis. When asked recently about reinstating those visits, Rabbi Miller said, "Personal contacts with congregants are among my highest priorities. I am eager and chomping at the bit to resume the 'coffee times' which we first conducted shortly after my arrival some years ago. The strategic initiatives which you are creating will also give me the opportunity to personally communicate what's ahead for the membership." That speaks volumes.

Of course, the congregation rightfully expects participation at lifestyle events such as a bris, baby naming, B'nai Mitzvah, confirmations and weddings. In addition, because personal contacts are so important, we suggest that the Board and management create other mechanisms to increase the proportion of their working hours that the clergy spends with congregants. We are sympathetic to the rigors of their schedules but consider personal interactions to be a high priority.

We recommend: That the Board work closely with the clergy to create opportunities for more frequent personal interactions with congregants wherever they live.

CRISIS MANAGEMENT PLAN

Winston Churchill famously said, “Never let a good crisis go to waste.”

Along with all other institutions in Southwest Florida, the Temple has come through crises caused by hurricanes, acts of bigotry or the current pandemic. The leaders of the Temple have met those challenges well largely through using sound judgment and a sense of urgency. We suggest that as further protection, the Board approve and communicate a Crisis Management Plan which would incorporate the lessons we have learned, and best practices gleaned from others.

We recommend: That the Board read the Crisis Management Plan written by Executive Director, Deborah Fidel, discuss and revise it if necessary; the plan may then be approved by a vote.

VOLUNTEER CORPS

We have an advantage in Naples. We have congregants who have spent much of their lives in other cities where they gained valuable experience in their careers and by volunteering for non-profits, including other temples and synagogues. Many of them are retired or have reduced work schedules and have free time to volunteer. They are an important, but hidden resource for the Temple.

Even before the virus struck, because of the significant recent growth in the congregation our staff was being stretched. Now, it becomes an imperative to augment their work with volunteers.

Months ago, a talent search was begun to learn more about the characteristics of our members. We sought to categorize, as best we could, the expertise, skill levels and experience of individual congregants which could be most valuable to the Temple. Our assumption was (and is) that members would be willing to spend some time and energy on the Temple’s behalf. Some might help with budgeting and finance; some might bring advice in marketing and others might help with governance and management. Although some might decline because they feel that they have already contributed enough in their home communities, others would be complimented by the invitation. That outreach should be enlarged and given priority now.

We recommend: That the Board now seek to identify, connect with and recruit congregants with relevant expertise and experience to volunteer their time and energy to support the temple.

JEWISH EDUCATION

Our temple has had a history of providing the broadest and deepest Jewish education opportunities in the Naples community. Our Adult Education, Religious School and Preschool are unique and have inspired Jews here to join and participate actively in our congregation. Now with the arrival of Rabbi Boxman, we expect a new dedication to enhance our role as the superior Jewish educator in Southwest Florida.

Coincident with this new dedication of financial resources for education, the Board might want to consider creating a more active Adult Education Committee which could support educational initiatives and serve as a sounding board for feedback.

The pandemic has forced the Temple to create new and virtual ways to provide education. Necessity has been the mother of invention and ingenuity. The willingness to learn remotely has opened up new opportunities to utilize educational content produced elsewhere. Having learned to use technology in new ways should serve to enlarge participation. That sounds positive, but there must be a balance between distance learning and on-site learning. There are intangible social benefits when the Temple holds in person programs which add immeasurably to the strengthening of our Temple community. Perhaps recording on-site programs for replay later by the members is a partial answer to this dilemma.

We recommend: That the Board continue to stress our unique Jewish education capabilities which serve to differentiate us from other Naples Jewish organizations

{Editorial Note: We have chosen not to include the Pre-School in our Report at this time}

THE TEMPLE'S ROLE IN THE COMMUNITY

Decades ago, when the Temple was in formation, its role was clear: To serve as the principal house of worship and a central meeting place for Jews in Naples. It was unique—in the absence of other sources of Jewish activity in the community. Gradually (and in more recent decades), as the size of the Jewish population grew here, residents formed other institutions to meet their spiritual, educational and social needs. Although still the largest house of worship, the role of the Temple became more difficult to define.

We believe that the Temple should consider its current role as multi-faceted. We should be willing to be an active partner with other Jewish organizations where we can bring some valuable characteristics. Our facility is unique, and our Jewish educational breadth and expertise are unparalleled. Collaboration—not competition--should be the guiding principle. By joining with others, we strengthen the Jewish community and build goodwill for our institution. Of course, on a practical level, successful partnering requires shared responsibility and shared costs.

We expect to have new opportunities for sharing when the Federation becomes our neighbor. We envision the possibility of providing appropriate space for each other for each organization's activities and perhaps the sharing of the cost and use of technology and equipment. We should also create joint programs with WCA and MCA using the popular MCA Shabbat dinners as a model.

Although we sometimes have somewhat different approaches, we should also strive to find commonality with our friends in other local Jewish congregations to share ideas, promote activities and perhaps to share expenses.

We recommend: That the Temple seek opportunities to collaborate with other Jewish organizations.

SOCIAL ACTION

The concept of Tikkun Olam - "to repair the world" is a tradition and reflection of our Jewish values throughout our history. At Temple Shalom, the Tikkun Olam Council (TOC) sponsors events and programs to encourage congregants to learn about important issues and to help make our community and world a better place.

In our rapidly changing world, the need for social action could not be more important. To underscore this importance, we recommend that a member of the Board of Trustees serve on the Council.

We also recommend support for the Council to sponsor events and programs that:

- Help connect congregants with ways to address community needs throughout the year within the greater southwest Florida community, and across our nation and world. Examples include the numerous projects supported by Mitzvah Day and support for a synagogue in the Ukraine.
- Engage in learning about current issues and how to bring about long-term and systemic solutions - work with deep roots in the Reform movement and led by the Reform Action Center (RAC). Examples include the JCRC Day of Learning, voting rights, the sustainability task force, the new Bridges initiative to build a relationship between an African American group and the Jewish community, and forums on healthcare, the environment and reducing gun violence.

These activities should:

- Focus on long-term change as well as short term projects.
- Work with other Jewish community organizations when possible.
- Set priorities to maximize impact given limited resources.
- Encourage newer members and their families to participate.

PUTTING THE PLAN INTO ACTION

All too often strategic planning groups labor to define meaningful new initiatives which are soon “put on the shelf” and seldom used. The planning itself “feels good” at the time, and some assume that with the approval of the plan, the job is done. That misses the point. We believe that the final adoption of this plan means that the real work will then begin. Many scholars in the field consider implementation to be the most critical phase of successful planning. We agree.

To that end, we suggest that the Board assign specific responsibilities described in this Report to specific people with specific goals and timetables. If there is sufficient accountability, positive results will follow. We have attached suggested monitoring mechanisms to judge our performance over time.

We recommend: That the Board appoint an Implementation Committee which will develop an Action Plan to ensure that those recommendations in this Report which it accepts will be successfully implemented.

MEASUREMENT OF PROGRESS

We said earlier that this Report and its recommendations should not be “put on the shelf”. On the contrary, it would be prudent to periodically measure progress by using a consistent set of metrics to judge performance.
{fill in metrics}

CONCLUSION

Our Strategic Planning Group, which has been in existence for only a short time, has not sought to address conclusively all questions before this Board of Trustees. That was not our charge. Instead, we have sought to create a recommended framework for decisive action by the Board and its committees during this unique and challenging time.

We recognize that this will be a dynamic and organic process. If they are accepted, our recommendations can and should continue to change to fit evolving circumstances. The only constant is change. If done well, the actions contemplated in this report will be taken by conscious design—not by happenstance, and the Temple should be able to react favorably to change on an increasingly stable footing.

ADDENDUM

STRATEGIC PLAN MONITORING PROPOSALS

1. Capacity projections for space, staff, clergy and projected income
 - a. Using 3 rates of membership growth: high, probable, negative
 - b. Monitor actual every 6 months
 - c. Based on trend analysis, the Board should develop a plan for required changes required
2. Effectiveness of L'Shalom
 - a. Track and monitor pledges received vs budget every 3 months
 - b. If deviating from budget in a significant way, the Board should develop a contingency plan
3. Leadership Development
 - a. Restart the Mentoring program within 3 months
 - i. Monitor the number of active teams and the number of interactions per month, every 3 months
 - ii. Use evaluative feedback to sense effectiveness
 - b. Develop a Leadership Training within 6 months
 - i. Monitor the number of sessions and the number of participants in each session

- ii. Use evaluative feedback to sense effectiveness
- 4. Connectivity Opportunities
 - a. Each membership connectivity event or activity that is planned should have a stated purpose
 - i. Use evaluative feedback to sense effectiveness
 - ii. The Board should be appraised of the results
- 5. Outreach to members in Bonita and Estero
 - a. Each membership connectivity event or activity that is planned should have a stated purpose
 - i. Report the number of people attending
 - ii. Use evaluative feedback to sense effectiveness
 - iii. The Board should be appraised of the results
- 6. Facetime with the Clergy interaction get-togethers
 - a. Each occurrence should be reported and tracked
 - i. Report the number of people attending
 - ii. Use evaluative feedback to sense effectiveness
 - iii. The Board should be appraised of the results every 3 months
- 7. Crisis Management Plan
 - a. Based on experiences past and present, develop a plan to deal with the unexpected which should be completed and approved by the Board within one year
 - i. Set dates for a draft, final proposal and approval
 - ii. Measure an estimate of the completion of each stage on a monthly basis
- 8. Continue "Talent Search" efforts to identify volunteers and future leaders
 - a. Keep records of the number of members identified, asked to participate and accept participation
 - i. The Board should review the progress every 6 months
- 9. Modernize Educational Curricular
 - a. Develop a timeline for this project, to be completed over the next 2 years, and check points along the way
 - i. Monitor completion date of checkpoint vs plan
 - ii. Report to Board accomplishment status every 6 months
 - b. Report the number of distance learning programs started
 - i. Report the number of people participating in each program
 - ii. Report to the Board every 6 months
- 10. Strengthen the Temple's role in the community
 - a. Monitor the number of shared programs/activities, the number of programs/activities and the number of people in attendance at each
 - i. Report to Board every 6 months
- 11. Appoint an Action Group to implement the Strategic Plan
 - a. Initiate Action Group within 3 months
 - i. Report to Board the number of Action Group meetings every 3 months
 - ii. Report to the Board the progress on each initiative over time
 - b. One member of the team should be the collector of data and develop the reports