

CONGREGATION



Beth El

CHARTING A PATH FORWARD

A Five-Year Plan to Sustain and
Enhance a Center of Jewish Life
at Congregation Beth El

What Is Our Mission?



To be a Conservative synagogue that creates a home for every soul by offering a variety of Jewish experiences to nourish the mind, heart and spirit, while being a caring Jewish community.

What is our vision?

To be known throughout San Diego as a synagogue that welcomes all Jews and fulfills their spiritual, emotional, intellectual, cultural, life-cycle and social needs, maintains a focus on ensuring Jewish meaning for future generations and emphasizes *Tikkun Olam*.

What are our values?

- We are welcoming and inclusive
- We operate with
 - Responsibility
 - Transparency
 - Trustworthiness
- Our interactions are characterized by
 - Respect
 - Gratitude
 - Joy
 - Humility
 - Optimism
 - Kindness
- We share commitment

What are our general challenges?

- Shrinking national and local synagogue affiliation rates
- Intermarriage
- Disparate views of what it means to be Jewish
- Time pressure
- Alternative Jewish institutions
- Competing forms of education/entertainment
- Geographically-dispersed families

What are our local challenges?

- Affiliation rate that is lower than the national rate
- Cost of membership is stressful to some families
- Cost of VTS education is stressful to some families
- Competition in the form of other synagogues and Jewish institutions, including Chabad
- Competition from non-synagogue communities
- Non-religious “spiritual” communities and individual searches for personal meaning
- Anti-Semitism in public educational institutions
- Social media
- Large variety of entertainment and educational options
- Sun and fun
- Relevance

In face of these challenges, what are our priorities?



- Creating a vibrant Jewish future
- Creating lasting Jewish connections within and outside of Beth El
 - Social
 - Religious/spiritual
 - Continuity
- Creating and implementing *Tikkun Olam* opportunities that promote the above goals
 - Impact on those served
 - Impact on those serving
 - Impact on the brand of Congregation Beth El
- Creating a communal Jewish Place within and outside the four corners of Beth El
 - Social
 - Religious/spiritual
 - Continuity Individualized searches for personal meaning
- Promoting individual spirituality for Beth El members and potential members

Recommendations



To meet our priorities, the Strategic Planning Committee recommends setting the following goals and objectives, and implementing the proposed strategies.

Goal 1



Be known throughout San Diego
as a synagogue open and
accessible to all Jews

Objective: Offer an affiliation model that features acceptance of members' financial responsibility to the CBE community, yet remains affordable to all



Strategies

- Shared commitment model instituted in FY17
- Aggressive, ongoing education about model and the financial support required from the membership to sustain effective operations at Beth El

Year 1

Objective: Consistent with Conservative values, provide a welcoming environment that provides meaningful connections

Strategies

- Create a welcoming environment for non-traditional families
- Create a welcoming and comfortable environment for Jews with different levels of observance
- Make ritual accessible
- Through the Women's Connection, develop outreach for converts; create network of Shabbat dinners
- Adopt Siddur Lev Shalem and integrate into the Beth El community

Year 1

Year 2

After consultation with new rabbi:

- Maintain Kashrut but actively embrace other dietary models that are consistent
- Explore models of worship and community that integrate intermarried families into the Beth El family; expand *Gesher*

Objective: Provide an environment and activities that are easily accessible and enjoyable for those with a diverse spectrum of disabilities and health needs

Strategies

- Address issues of physical access; purchase a hearing assistance system.
- Explore methods of providing Jewish education to children and adults with learning challenges, difficulty with social relationship, and visual and auditory issues.
- Explore how to make food-oriented programs accessible for individuals with dietary restrictions

Year 3

Objective: Build awareness of Beth El and what it provides through enhanced internal and external relations

Strategies

- Utilize professional support for communications and branding functions through knowledgeable volunteers or paid service
- Convene focus groups to identify Beth El differentiations and reasons that members join
- Update the communications strategy to emphasizes Beth El's value and values to membership and the larger community, reflecting our identity as a quiet leader and provider of quality service, place, programming and compassion for the broader community

Year 2 (to be deferred to the
Communications Committee for study in Year 1)

Goal 2



Provide basis for
lifelong meaningful
connections

Objective: Frequent review of members' needs for connection.

Strategies

- Form a standing membership committee
- Working with the Council of Committees, evaluate the relationship of the membership committee to the program committees and recommend an appropriate structure for oversight and collaboration in furtherance of this objective
- Identify core constituencies (i.e., seniors, post-b'nai mitzvah, young adults)
- Evaluate vulnerabilities and needs of core constituencies
- Evaluate current programs, using metrics and improvement cycle
- Focus groups to identify needs and desires, and to obtain feedback for improvement
- Develop a membership plan that addresses recruitment of new members and their integration into the Beth El community (*Gesher*), and utilization of programming to those ends

Year 1

Objective: Connect members through common interests.

Strategies

- Beyond the program committee: use the power of social media to build self-sustaining groups with common interests that cross age lines
- Transition groups through stages of the life cycle to keep them engaged in the Beth El community

Goal 3



Emphasize *Tikkun Olam*
as a path to communal
and spiritual growth

Objective: Become a “light unto the world”

Strategies

- Identify projects that are impactful and that Beth El can call its own
- Continue participating in community projects such as Mighty Mitzvah Sunday
- Involve program committees, as appropriate, to further membership involvement

Objective: Transmit *Tikkun Olam* as a value beyond the synagogue walls

Strategies

- Develop programs that help turn good thoughts into action
- Use effective communication strategies to demonstrate the value of Beth El to the community
- Involve VTS students and other youth groups in community activities
- Encourage community service by adult B'nai Mitzvah students
- Emphasize *Tikkun Olam* as a value for all Beth El members

Goal 4



Build reputation as a provider of
education to children, teens
and adults that is
meaningful and compelling

Objective: Assert the community's responsibility for educating our children by incorporating the bulk of educational fees into the sustaining amount asked of the membership.



Strategies

- Educate the Beth El community through sermons, D'var Torahs, and membership communication
- Substantially reduce VTS fees
- Increase availability of need-based aid for VTS

Year 3

Objective: Retain 75% of VTS graduates in post-B'nai Mitzvah programming

Strategies

- Offer an array of programming that encompasses education that is relevant, spiritual, and social
- Make *Tikkun Olam* a major factor in teen-oriented programs
- Adapt worship to teen exigencies

Objective: Make the campus pre-school the first step of a family relationship with Beth El

Strategies

- Identify size of pre-school population at Beth El
- Survey current Beth Montessori pre-school parents to develop better understanding of their educational, community and spiritual needs.
- Explore feasibility of a Beth El pre-school/explore possibility of deeper ties with Beth Montessori

Year 3

Objective: Build love of Israel among the members of the Beth El community.

Strategies

- Provide an open environment for education and exchange of views
- Build participation in Israel Day events
- Promote a meaningful and lasting relationship with San Diego's sister city, Sha'ar HaNegev
- Through education, prepare Beth El students to face anti-Israel sentiment with facts and confidence
- Promote pride

Year 1

Objective: Continue offering varied adult education programs.

Strategies

- Survey members to determine interests
- Develop feedback loop for programs
- Develop joint ventures with other Jewish educators

Year 2/to be addressed by new Rabbi

Goals



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Ensure ongoing viability
through involved, engaged and
committed lay and
professional leadership

Objective: Meaningful succession planning

Strategies

- Develop plans and procedures for continuity in the pulpit and the Executive Director
- Develop a plan for continuity of leadership of the Board

Objective: Develop a committed and engaged Board of Directors who have the skills needed to manage a synagogue in an increasingly complex environment and also represent the breadth of Beth El members.

Strategies

- Form active, diverse nominating committee
- Enlist expertise of USCJC
- Develop a matrix of needed skills on the board
- Survey membership to identify skills and contacts
- Build a bench of lay leadership through consistent engagement of committee chairs
- Capitalize on the social nature of Beth El to identify committed members

Objective: Maintain a work environment that attracts the best professionals who provide the best of their abilities



Strategies

- Evaluate contracts, satisfaction and plans of staff leadership
- Provide professional development opportunities
- Professional development reviews
- Update human resources handbook
- Identify program priorities and needed human resource support

Goal 6



Ensure the future by building
financial security

Objective: Increase overall membership through the shared commitment model

Strategies

- Town hall meetings
- Set quantifiable goals
- Improved branding and communications, in and outside of the Beth El community

Objective: Increase the number of honor roll members by 10% each year and honor roll revenues by 20%

Strategies

- Development committee outreach
- Town hall meetings
- Donor analysis and one-on-one meetings
- Membership engagement
- Honor roll events
- Better donor stewardship

Objective: Expand revenue base to meet Beth El's priorities by seeking new sources.

Strategies

- Expand membership
- Market-appropriate leases with tenants
- Explore foundation grants
- Look for project-specific grants

Objective: Make development/fundraising a priority.

Strategies

- Appoint development committee chair who is a member of the Board
- Create an annual fundraising plan that includes the Kol Nidre appeal and special events
- Evaluate the efficacy of current fundraising efforts
- Survey other synagogues to see how they handle fundraising
- Hire a part-time development employee (20 hours per week)

Objective: Maintain financial and management best practices

Strategies

- Continue developing written policies and procedures
- Continue practice of fiscal responsibility and transparency
- Where feasible, update and modernize technology
- Include members with expert knowledge on the Board of Directors
- Ensure that committees are staffed by persons with specific and current knowledge

Objective: Secure Beth El's future by building a financial foundation

Strategies

- Increase focus on building the endowment
- Expand and publicize planned giving program (Legacy Society)
- Create an innovation/risk fund that funds new programs in furtherance of Beth El's mission
- Create a capital improvement fund

Goal 7



Maintain an attractive and safe
environment for our
community to flourish

Objective: Ensure adequate safety and security for our children, families, tenants and visitors whenever on the CBE campus and at all CBE events.

Strategies

- Monitor and update security studies
- Develop and implement a list of priorities for physical improvements
- Develop processes and procedures to train staff and to address emergencies
- Develop coordinated processes and procedures with tenants
- Annual update of communications, processes and procedures (more often, where required)
- Develop system for car monitoring