

Agudas Achim Congregation
Strategic Plan Final Report
November 2018

Contents

Introduction	3
Agudas Achim Vision Statement	5
The Strategic Planning Process	5
Drivers of Success.....	7
Action Items For The Board	8
Implementation	10
Appendix 1: Fact Book.....	11
Appendix 2: SWOT Analysis	23
Appendix 3: What We Learned From the Data	25
Appendix 4: Task Force Reports.....	33
Leadership and Governance	33
Operations and Finances.....	43
Spirituality, Prayer and Learning.....	47
Internal Communications and Membership Engagement.....	60
External Communications	78

Introduction

When I ascended our bima for the first time in February of 2014, I shared that my number one goal as a rabbi and the key to the future of Agudas is one and the same: coming together to engage in meaningful relationships with God, with family, and with community. As our recent congregational survey suggests, that is why you are here. Now what? Where do we go next?

In order to chart out our future we embarked upon a strategic planning process, the product of which is contained this report. It is based on congregational input from numerous community conversations, interviews, and surveys. We focused on five priority areas which are described below, and the connective tissue between all of them are the sacred relationships we have with each other. We are in the business of helping people find connections and experiences of wholeness through relationships. The reason is quite simple: We are creating a community built on covenantal relationships because we believe we are a stronger community when we connect with each other and our sacred tradition. Together at Agudas Achim we create meaningful, purposeful, connected, and blessed lives.

Now, I have news for you. This is not something that the Hazzan and I are going to be doing for you. This is not the byproduct of the shul president or its board of directors. A community that places relationships at its core is the responsibility of all of us. Everything that we do as a community – from daily minyan to social action, from adult education to concerts – must have as its goal building relationships. That is why people come to Agudas Achim and that is why people stay. Some of this will be the work of implementing our strategic plan. Much of it we can begin doing today.

Our Sages teach us that each human being is created in the image of God, and each human being has something unique and special to give to the world. In a relational community we are present; we are curious; we are interested in the unique talents of every person. We aren't welcoming just to be nice, we are welcoming out of a covenantal curiosity. The first step is we need to talk to each other. Reach out to each other. I want Agudas Achim to be known as the shul that when you enter a room, someone pulls up their chair and says: have a seat with us; we are happy you are here; we see you; we want to learn more about you. If someone asks, "Did anyone know I was there?" we must all answer with a resounding "Yes!"

I want us to create personal encounters with one another. Invite members of the Agudas Achim family to your home for Shabbat, a Sunday brunch, or meet for a social evening. All you need is the curiosity to get to know one another. Help people tell their stories. I encourage you to approach someone you don't know and

ask them to share their story. Find out what keeps them up at night. If we can be a community that is known for being interested in people's stories...people will then say: maybe when I join they will be interested in me.

We must always be connecting and caring. Our Caring Committee helps coordinate providing meals for congregants, visiting congregants in the hospital or recovery at home, assisting with errands, providing rides, and so much more. The work of our Social Action Committee is truly making a difference in our broader community. Both are driven by the desire to do good deeds. But more than good deeds, relationships are being fostered – whether with the individual you escort to the doctor, or the team of people with whom you are planning a Social Justice Seder.

We are also changing the way we do 'good' in our community. When you start to have one-on-one conversations with people, you begin to realize that there are new issues and new concerns. This is demonstrated by our work with the Alfred Street Baptist Church, our inclusion committee, and our newly formed LGBTQ committee. We don't need top down synagogues; we need a shul where you are empowered to self-organize around the issues you are passionate about.

Finally, the entire board is reading Ron Wolfson's "The Relational Judaism Handbook." One of the primary reasons we are having discussions about relational Judaism at the board level is because I want our board to be self-reflective, work together as a team, engage each other and listen to each other's stories. It is a fundamental maxim in leadership that if we want a more relational community, our leaders need to role model the change we seek. Every congregation aspires to be warm and welcoming. You should know that the leadership of your community is spending time at every board meeting to think about and discuss this vital topic.

I am pretty sure that millennia ago, our prophets did not know from Strategic Plans, boards, relational handbooks, or synagogues for that matter. But what they consistently made loud and clear is that ritual behavior is simply not what Judaism is all about. The sacred path, they teach us, requires sacred relationships. Not only must we "share our bread with the hungry" we must share our bread with each other. If we do, not only will we find favor before God, but we will be the beneficiaries of our sacred heritage and create a community we can all be proud of.

I look forward to taking this sacred journey TOGETHER!

Rabbi Steven Rein

Agudas Achim Vision Statement

Where there is no vision, the people perish. (Proverbs 29:18)

A vision statement is an aspirational word picture describing what the congregation could be when at its best. It helps remind us where we have decided to go and sets objectives to guide us and measure our progress in implementing our strategic plan.

Our vision statement is the cornerstone of our strategic planning process. The Mission and Vision team devoted hours of effort and worked through many iterations to produce the following vision statement that succinctly captures the congregation's aspirations to live, act and worship Jewishly:

Agudas Achim is a community built on covenantal relationships. Each and every day we elevate and nourish our minds and souls while building a sacred community. We care about each other, we care about social justice, we care about Israel, and we care about YOU.

The Strategic Planning Process

The Strategic Planning Process was initiated in the spring of 2017. Agudas Achim was one of a cohort of synagogues involved in the USCJ's Sulam for Strategic Planners program, which is part of their Thriving Congregations initiative. USCJ Transformation Specialist Aimee Close provided the framework and guidance as we went through the process.

Our strategic plan was designed to be both comprehensive and actionable, and includes input from as many members of the Agudas Achim community as possible. The process began with a 16-member steering committee, then proceeded in widening circles reaching out in a variety of ways to anyone who wanted to be involved. The resulting discovery process yielding a plan based on the genuine concerns and constructive ideas of the congregation. The process was also intended to get people involved and enthusiastic about the strategic planning process to improve the likelihood that the recommendations in the plan would be implemented.

The steering committee formed in March 2017 under co-chairs Rabbi Rein, Rachel Goldberg, and Jim Robbins. The members were Ellen Bayer, Ann Bennett, Renee Berman, Stan Blacker, Doug Fagen, Joel Goldhammer, Meredith Ludwig, Barry Nove, Arnie Rosenblatt, Ilana Rothberg, Lynne Sandler, Melissa Siskind, and Nicole Yakatan. This group met monthly throughout the strategic planning process.

The Steering Committee was subdivided into teams covering Communications and Writing, Mission and Vision, and Data Gathering. The Communications and Writing team provided periodic updates and information to congregants throughout the process, while the Mission and Vision Team crafted AAC's new vision statement. The Data Team set to work immediately collecting information about the synagogue and the opinions of its members.

The Data Team assembled a Factbook (see Appendix 1) which contains basic in-house data and information from nearby synagogues and the community regarding the size of the membership, demographic data, member dues and other basic information. The data team also conducted the Thriving Congregations Assessment, a questionnaire completed by the Steering Committee and the Board (about 40 people total) regarding various aspects of synagogue life.

Additionally, the Data Team conducted more than 40 Personal interviews of board, professional staff, and committee chairs to ascertain their views on what works well and what needs improvement. A Congregational Survey was completed by more than 300 congregants and member units (see Appendix 2). Finally, there were a series of Community Conversations, in which more than 100 members attended 9 parlor meetings to discuss strengths and weaknesses in the community and make suggestions for change. A summary of the most important things we learned from the data is in Appendix 3.

The Steering Committee distilled this wealth of data into five topical areas for the second or Task Force phase of the strategic planning process. The five areas were: leadership and governance; operations and finances; spirituality, prayer and learning; internal communications and membership; and external communications. Five task forces were formed to assess these topics and suggest steps for improvement.

The Task Force phase lasted from March to May 2018. In that time, the groups further reviewed and discussed the data, crafted the draft Vision Statement, and came up with proposed courses of action. In all, the task forces presented 25 specific actions to set us on a course to greater connectivity, spirituality, learning, strong and accountable governance, sound leadership, and financial stewardship. The Steering Committee met on June 27, 2018 to prioritize the task force recommendations, assess resources needed to achieve the goals, and set metrics for implementation.

We would like to express sincere gratitude to everyone who participated in this process. The thoughts and opinions you have provided have shown how much we all care and invest in this community. And, we would like to offer a huge thank you to the amazing, dedicated, hardworking, incredible volunteers who have served on the Task Forces and Steering Committee.

Drivers of Success

The task force members identified the following “Drivers of Success” for realizing the vision for the synagogue:

- **Physical Infrastructure** to sustain our vision for AAC include developing more high quality physical space by optimizing the use of the current space in the short run, plan for facilities to meet current and future needs. and then we should invest in expansion to meet those needs.
- AAC needs strategic and coordinated **fundraising**, and should nurture a culture of philanthropic giving.
- Congregants should make the effort to promote **engagement** and develop relationships between and among members. AAC should build a strong sense of community with meaningful relationships, hospitality and service.
- AAC should seek ways to increase its **membership**, especially among young families. The shul should also enhance processes for the effective engagement of new members to integrate them smoothly into the community.
- AAC should improve and transform its **governance**, engage in success-focused leadership development, and have a board that is developed and structured for the long term.
- As the vision statement suggests, the congregation should infuse everything we do with a focus on **covenantal relationships** and relational Judaism, and make Agudas Achim a destination synagogue for people seeking those values. The synagogue should also make an effort to reimagine our Shabbat experiences with this in mind.
- AAC should integrate its diverse **programming**, empowering existing sponsored activities to help them flourish.
- AAC needs a much more comprehensive and consistent **communications** strategy and activities to raise community awareness.
- AAC needs adequate **staffing** to facilitate the current and future programmatic aims of the congregation.
- AAC needs better **fiscal planning** and ways of executing operational improvements.
- AAC should have effective means to evaluate **progress** in achieving goals.
- The communication of the AAC strategic plan to our Congregation should communicate the Steering Committee’s and the Strategic Plan Task Force members sense of excitement around **aspirational change** to realize the goals of the strategic plan

Action Items For The Board

The task forces came up with 25 specific action items for the Board to implement. Of this list, task force members prioritized the **top 8 action items** based on weighing their importance, affordability, time required, and general feasibility.

1. Consider hiring a director of programming and engagement
2. Conduct a study of facility usage and audit of needed repairs
3. Enhance fundraising capabilities, including legacy giving
4. Create a social media strategy/Make better use of social media
5. Develop principles for leadership/leader development and succession planning
6. Create accountability process for lay and professional leadership/create and implement new structure for boards and committees
7. Enhance the shabbat morning experience/Enhance Friday night experience
8. Build a stronger teen community

The full list of action items grouped by task force is below. The task force reports in Appendix 4 have details on how the action items were determined, their projected costs, and how long they would take to implement.

MEMBER ENGAGEMENT

Vision: "... to bring people together by creating a caring community where people want to stay connected through worship, cultural and social events."

- Establish new member welcome protocol (including training a new member engagement team)
- Create and promote hospitality efforts
- Make Relational Judaism part of all our programming
- Consider hiring a director of programming and engagement (**potential significant budgetary impact)

OPERATIONS AND FINANCE

Vision: "... to ensure efficient operations and maintain a model of financial sustainability."

- Review current staffing model, update job descriptions, and make needed adjustments
- Enhance membership and financial reporting to the board
- Institute training for staff and lay leaders
- Enhance fundraising capabilities, including legacy giving
- Conduct study of facility usage and audit of needed building maintenance and repairs

LEADERSHIP AND GOVERNANCE

Vision: "... to govern fairly and responsively with an openness that allows all members to be informed... and to participate in the process according to their interest and capacity."

- Create and implement new structure for board and committees
- Create accountability process for lay and professional leadership
- Develop principles for leadership
- Leadership development and succession planning

SPIRITUALITY, PRAYER, AND LEARNING

Vision: "... elevate and nourish the mind and soul while building community."

- Create a comprehensive Jewish learning framework with customized learning experiences (a Jewish "Khan Academy")
- Enhance the Friday night experience to be more inclusive, engaging, and inspiring
- Enhance the Shabbat morning experience by providing fresh approaches and newer practices
- Build a stronger teen community through immersive experiences, leadership opportunities, and meaningful social action opportunities

INTERNAL COMMUNICATIONS

Vision: "... all congregants to have access to information.... A tool to bring people together...."

- Develop a strategic communications plan
- Create social media strategy
- Implement new membership database software
- Reimagine the bulletin

EXTERNAL COMMUNICATIONS

Vision: "... to expand membership and to increase Agudas Achim's reach and impact in the broader community."

- Make better use of social media
- Increase brand awareness/reputation in the community
- Actively invite participation of non-members, non-Jews from the broader community
- Focus on under-represented populations

Implementation

A practical strategic plan is not simply a list of good ideas, but a call to action. The Agudas Achim strategic planning process has involved a year and a half of volunteer effort and touched hundreds of members of the community. During this process we have listened to many congregant concerns, as well as heard a great deal of positive feedback. Some of the findings from the process were surprising, others were about what we expected. And the result is a detailed snapshot of our thriving congregation.

The implementation phase of the strategic process should be undertaken with this same positive energy and productive spirit. The recommended action items listed above are the product of a grass-roots, collaborative effort. They represent the distilled wisdom of the congregation, and its vision for what Agudas Achim can become. It is now up to the board to consider and implement these recommendations.

To oversee the implementation phase of the process, the Board should form an Implementation Team. The team will be charged with establishing timelines for action on each of the action items, delegating tasks for implementation, establishing metrics for success, following up regularly with the Board on what actions have been taken, and reporting to the congregation every month on progress in implementing the recommended action items.

The Implementation Team is responsible for holding team members accountable for their work in advancing the recommendations, but the Board is the ultimate authority for ensuring accountability.

The implementation process will be kicked off with a congregational meeting presenting the results of the strategic planning process and soliciting volunteers to join and assist the Implementation Team.

Some of the items on the task list are easy to accomplish; in fact, some are already underway. Others are more difficult. The Steering Committee strongly advises all Board members to read through the entire strategic planning document to understand the thinking involved in each of the recommendations, why they were considered important, and what may be involved in implementing them.

Likewise, members of the staff, committees, and other people and groups who are receiving recommendations that have been approved by the Board, should understand the background of the recommendations and work hard to implement the vision and strategies. This may involve adding things that the Task Forces did not consider, shifting priorities, or making other changes. But we hope that everyone involved in the implementation process will honor the spirit of the strategic plan, and the sentiments of the hundreds of members of the community who contributed to it.

Appendix 1: Fact Book

Fact Book Exercise

Rationale for Fact Book

Strategic planning leaders must seek to develop shared assumptions that are based on facts, rather than opinion, about forces and trends that are impacting their congregation. A Fact Book organizes the data collection and recording process. As the process evolves new facts will be added to the Fact Book. An initial review of the Fact Book is required pre-work before the Steering Committee does the SWOT (Strengths, Weaknesses, Opportunities, and Threats) Builder exercise.

INTERNAL

Age

Demographics (individuals)

Data to Consider	10 years ago	2017/18
0-6		127
7-13		95
14-18		87
19-24		119
25-34		33
35-45		160
46-55		134
56-66		178
67-76		196
76+		112

Membership (per family units)

Data to Consider	10 years ago	2017/18
Membership history overall	537	496
Family		
Individual		828 adults; 371 children

Members with Children Living in the Home

Data to Consider	10 years ago	2017/18
Children under 17 in the home		109
Children under 6 living in the home		73

Describe Dues Approach:

Dues categories are divided into categories of households with one or two Jewish adults, and age brackets. The thinking is that adults in the 35-49 bracket and 50-74 bracket have the greatest income so they pay the highest rates, with younger members paying less.

Dues

Data to Consider	10 years ago	2017/18
Members by dues level	Amit/Assoc.: 35 Chaver: 8 Cont: 5 Honorary: 17 Junior: 2 Allah v' Chattan: 2 Kehil: 2 OneYG (<35): 16 OneMd (35-49): 52 OneEN (50-74): 84 OneSen (>75): 27 Talmid: 2 TwoYG (<35): 12 TwoMD (35-49): 71 TwoEN (50-74): 172 TwoSen (>75): 34	37 18 0 8 1 2 1 5 43 105 27 0 6 61 132 46
Note: list your levels as you see best	Total: 537	496

Data to Consider	10 years ago	2017/18
Number with dues abatement		45
Percentage of members on dues abatement		45/496=9%

Fair Share-As Percentage

List number of members in different levels groups ie. \$1000-\$1500 etc.

N/A

Fair Share-Based on an Income Sliding Scale**Provide scale and percentage of members at each level.**

N/A

Competitive Grid on Costs

How do your membership costs compare to two neighboring congregations?

Congregations	Dues	School Fees	Building Fund	preschool
Our Congregation	Amit/Assoc.: \$250 Chaver: -10% Cont: ? Honorary: - Junior: ? Kallah v' Chattan: \$500 Kehillah: free, 1 yr. OneYG (<35): \$942 OneMd (35-49): \$1,247 OneEN (50-74): \$1,469 OneSen (>75): \$1,164 Talmid: \$180 TwoYG (<35): \$1,773 TwoMD (35-49): \$2,356 TwoEN (50-74): \$2,632 TwoSen (>75): \$2,134	K/1/2 (3 hrs): \$646; 3-6 (3 hrs Sun., 2 hrs Wed.): \$794; 7: \$615 class; \$945 bar mitzvah fee; ATID, 8-12 (3 hrs on Sun): \$615	\$1,000/one adult household \$1,500/2-adult household payable over 5 years	member rates: 2-day, 2s: \$3,340 3-day, 2s: \$4,730 4-day, 3s: \$5,950 5-day: \$7,220 non-member rates: 2-day, 2s: \$3,830 3-day, 2s: \$5,740 4-day, 3s: \$7,070 5-day: \$8,550

Congregation A — Beth El	\$2,306/family; 2% of income	member rates—tuition, books, fees: k-\$593 1-\$594 2-\$615 3-\$593 4-\$725 5-\$681 6-\$697 7-\$1,277 8, 9, 10-\$545 11, 12-\$25	\$375/yr for 8 yrs; \$100 9+ yrs	members, f-t: \$1330/mo mem. p-t: \$860/mo
-----------------------------	---	--	---	---

Congregation B — Etz Hayim	Single - \$1,780; Junior Single (aged 34 or younger) - \$670 Junior Family (eldest family member aged 34 or younger) - \$1,470 Family - \$2,780 Senior Family (eldest member is aged 75+) - \$2,190 Senior Single (aged 75+) - \$1,410 Single Parent Family - \$2,100 Junior Single Parent Family (aged 34 or younger) - \$1,120 Benefactor (incl. religious school tuition & 2 add'l High Holy Day tickets) - \$5,250 Associate (for families who live outside the tri-state area but still wish to remain connected) - \$90	PS/K, 1/2 (3 hrs): \$650; 3-7 (3 hrs Sun., 2 hrs Wed.): \$1,050; 8/9 (3 hrs on 2 Sun/mo. plus field trips) : \$650		member rates: 2-day: \$3,096 3-day: \$4,644 4-day: \$6,508 5-day:\$8,142 5-day full-time: \$13,025
-------------------------------	--	--	--	---

This information should be used in the overall competitive grid in the area of cost.

For purpose of this comparison lower costs provide a higher rating.

Members: Reasons for Joining

Why have they joined? What are major reasons?

1. Rabbi
2. young families
3. preschool

just 1 family over 50 joined this year

Are these reasons changing in recent years?

50-74 was biggest group, now changing

Profile

What is the profile of the members who have joined over the last three years (ages, geography, religious background and practice, kids etc.)? Please describe.

More members are having children at an older age (30s-40s) instead 20s. More couples are interfaith with 1 Jewish partner; more members come from a mix of religious backgrounds either Reform or Conservative. The one thing that has remained constant is congregants joining when they have young children.

Has the profile been changing in recent years?

AAC members continued to be spread across all age cohorts.

Members: Why do they leave?

Exit Interviews: Resignations—by type (moved, joined other congregation, cost, dissatisfied). What are major reasons?

1. went to Olam Tikvah (Conserv.), Rodef Shalom (Reform)
2. deceased
3. move in retirement

It used to be that people left because they moved away. We are starting to see people changing to other congregations the area.

Other Data

Please provide any congregational surveys about members' wants and needs. Summarize the key points of your latest survey.

Worship

Data to Consider	5 years ago	2017/18
HH attendance	varies by day of week	400+400/
Friday night average	80-100 sec at 8 pm; 80 change sac to 6:30	20-30
Friday night special programs	100+	<100
Saturday morning – regulars	250-275	170

Saturday morning with bar mitzvah	400	250-300
Daily minyan	9-15	6-10

Shavuot yizkor attendance this year was 51, used to be more than 100 people.

Schools and Youth (enrollment)

Data to Consider	10 years ago	2017/18
Religious School Enrollment	120	125
Pre School Enrollment	new, 35	80
Youth groups – USY		
Hebrew High School	NA	NA
B’nai Mitzvahs	12-18	16

What percent of pre-school (if applicable) move from pre-school to religious school?

From Education Director: I don’t know this answer. A high percentage of Jewish preschoolers do enroll in kindergarten. We are not allowed to solicit preschool parents with membership opportunities or other opportunities. At least this was the case [under previous Preschool Director]. I think this has not changed. We can solicit member children. Of these probably 80% enroll. Those who don’t seem to enroll in day school.

Religious School Enrollment for coming year

Data to Consider	5 years ago	2017/18
K		10
1		19
2		8
3		12
4		7

5		12
6		12
ATID:		
7		12
8		6
9		3
10		3
11		3
12		2

Education and Other Programs (attendance)

Data to Consider	5 years ago	2017/18
Torah study		sat. 3, fri 4
Adult education series		20
Men's Club participants		<
Women's League participants		50+
Book groups		-
Choir		sisterhood—25
Hazak programs		N/A
Other		

Fundraising-Contributions (dollars)

Data to Consider	3 years ago	2017/18
Contributions - dollar	total: \$174,757	\$117,009
Contributions – value		
Capital contributions		
HH appeal	\$62,000-\$64,000	\$62,000-\$64,000
Major fundraisers		

Fundraising Events

List top fundraising events and net contribution in dollars - Last three years

The congregation doesn't have standing fundraising events. Different things pop up from year to year.

EXTERNAL

Are there population studies from Federation? Review Federation information about where Jews are living by zip code.

Are there independent studies? Has the JCC or the day school done any studies?

Can we talk to other congregations about the size of their pre schools etc.-
are new people moving in, etc.?

The American Jewish Yearbook estimates that about 9% of the National Capital area is Jewish, which is well above the national average. Jewish families are moving in as the area develops.

Questions

What is happening in the overall economy? Are jobs growing? Are housing prices rising?

The dynamic professional nature of the area, close to the national seat of government, guarantees an ever-shifting population. Jewish families are easily able to stay in the area, which has sufficient though not ample institutional support (synagogues, JCC, day school, availability of kosher foods, etc.).

Where are families moving?

The population of Northern Virginia is growing in general, and the Alexandria area reflects that trend. Census Bureau data show Alexandria's population at around 129,000 in 1980, and approximately 149,000 in 2013. The average age in the Alexandria area is 35, and slowly increasing.

The core, most active members of the Agudas Achim community are probably much older. However, the preschool program has attracted new families to the synagogue, and they have shown interest in joining the shul at a younger age than they might have otherwise. Also local population growth tends to come from a young professionals. So in terms of demographics, there is a great deal of potential for growth.

What is the impact on schools?

Alexandria public schools are overcrowded and over flowing at all levels k-12. This trend is expected to continue for the next 10 years.

Budget Summary

	Jul 16-May 17 Actual	Jul 16-May 17 Budget	16-17 Budget	Proposed 17-18 Budget	Revised 17-18 Budget
Dues	709,658	738,300	762,100	783,993	783,993
Donations	163,237	185,555	193,750	268,500	258,500
Religious School & Youth	93,110	114,913	123,157	132,777	132,777
Capital Campaign	1,332	2,100	2,500	2,000	2,000
Fundraising/Misc	66,953	91,783	115,701	165,423	175,423
Undesignated Receipts	(1,283)	0	0	0	0
Rental	27,000	29,000	35,000	34,500	34,500
Member Services	6,793	13,000	13,000	10,500	10,500
Ritual	1,119	1,100	1,100	1,300	1,300
Food Service	151,542	158,808	173,500	174,000	174,000
Preschool	642,059	642,865	710,825	650,043	653,043
Summer Camp	59,529	56,760	56,760	58,990	58,990
Interest/Investment Income	2,597	1,821	2,075	2,000	2,000
TOTAL INCOME	1,923,647	2,036,006	2,189,468	2,284,026	2,287,026
Administration	752,932	813,180	885,265	938,336	912,023
Communications	4,240	3,827	4,175	4,275	4,275
Property	155,498	159,642	172,250	184,150	172,150
Member Service	10,921	19,815	20,510	18,050	18,050
Ritual	10,137	11,630	12,200	12,000	12,000
Youth Services	201,068	209,548	225,702	255,484	243,972
Fundraising	3,855	3,300	3,300	1,200	1,200
Mortgage	25,850	16,500	18,000	26,600	14,400
Food Service	132,594	142,527	155,288	176,976	176,976

Preschool	584,896	603,955	655,550	617,917	607,893
Summer Camp	44,181	47,710	48,035	49,039	49,194
TOTAL EXPENSES	1,926,172	2,031,633	2,200,274	2,284,026	2,212,133
OPERATING SURPLUS (DEFICIT)	(2,525)	4,372	(10,806)	(0)	74,893
PRE-SCHOOL NET	57,163	38,910	55,275	32,127	45,150
SUMMER CAMP NET	15,348	9,050	8,725	9,951	9,797
FOOD SERVICE NET	18,948	16,281	18,212	(2,976)	(2,976)
ALL OTHER OPERATIONS NET	(93,985)	(59,869)	(93,018)	(39,102)	22,923
	(2,525)	4,372	(10,806)	(0)	74,893

CAPITAL IMPROVEMENT BUDGET		
Funding from reserves		97,000
		97,000
Expenses		97,000
		97,000
OPERATING SURPLUS (DEFICIT)		-

Appendix 2: SWOT Analysis

SWOT Analysis is a process for identifying the internal Strengths and Weaknesses, as well as external Opportunities and Threats for the synagogue. The steering committee conducted several SWOT analyses through the course of the process.

Strengths

- Rabbi and Hazzan work well together
- Hazzan – a true asset
- Caring community
- Kehila
- Preschool
- Easy to connect with people, warm community
- Strong core community, strong relationships
- Competent lay leadership
- Acceptance of interfaith families/Non-Jews on the bimah
- Religious school, with committed parents
- Daily minyan

Weaknesses

Financial issues:

- High debt
- No fundraising chair
- Unstructured, insufficient fundraising efforts
- No financial vision, what's important and how to pay for it
- Finances difficult to track, resources not used effectively
- Insufficient use or encouragement of volunteers to perform tasks
- Young families do not have to join to participate in high holiday programs
- Lax business perspective
- Lack of building maintenance plan/facility needing repairs and upkeep

Administration:

- Committees lack mission goals
- Unstructured/insufficient synagogue policies
- Policies not always implemented even when they exist

Communications:

- Calendar of events needs greater coordination between groups
- Website in need of improvement
- Better and more communications are needed

Other issues:

- Focus on children and families is sometimes at the expense of older members

Opportunities

- Growing Northern Virginia communities with potential for new members
- Capitalize on new members
- Capitalize on new staff
- We can create younger professionals and groups or other programs and activities to connect and attract singles

Threats

- Decline in membership
- Congregants are looking at their increasingly difficult commutes and evaluating their relationship to AAC
- Other congregations in the area may be closer or more attractive

Appendix 3: What We Learned From the Data

AAC is an “older” congregation with a preponderance of long-time, committed members. While this is not a surprise, knowing that survey participation closely mirrors the actual age of the congregation, we can be fairly confident that tenure also tracks accurately.

About 12 percent of congregants have been members for five years or less, 18% have been members 6-14 years, 31% have been members 15-25 years, and four in ten (40%) have been members for 26 years or more.

Half of AAC members are quite connected to the community. Fifty-two percent (52%) of AAC members come into the building at least once a week, while about three in ten (29%) come at least once a month and 18 percent come into AAC less frequently. Seven in ten AAC members (71%) have served in a volunteer capacity in the last three years. Congregants under age 46 (59%) and those age 67 or older (57%) are more likely to come into the building at least once a week than those in the middle age range (51%).

Interestingly though, longtime members come into the building much less frequently than mid tenure or newer members. Members without partners and parents with kids under 18 come into the building slightly more than those who are married/partnered or have no children at home. Distance and traffic are an impediment - those with the least interaction tend to live farther away.

More than eight in ten AAC members are satisfied with the synagogue. Eighty-two percent (82%) of AAC members are satisfied with the shul, including a third (33%) who are very satisfied. Nine in ten (90%) are likely to be a member of AAC five years from now, including two thirds (65%) who are very likely to retain their membership.

Just 10 percent are dissatisfied with the shul, including three percent who are very dissatisfied, and only five percent think it unlikely they will still be members in five years. Another eight percent describe their feelings about Agudas Achim overall as “neither satisfied nor dissatisfied.” Congregants who come into the building more frequently are much more satisfied (88%) with the shul than those with moderate interaction (80%) or low interaction (66%).

People join based on shul proximity, clergy and ritual, but stay due to friends/family connection.

Multiple responses were allowed, but over half of congregants (54%) cite location as a primary motivator for joining AAC. Nearly three in ten (29%) mention ritual practices and about the same percentage (28%) decide based on clergy, making ritual/clergy together 57 percent. Another 37 percent were motivated by a friends/family connection, and the same percentage (37%) note that religious education for their children (Preschool, Religious School or B'nai Mitzvah training) drove their decision to join.

Continued connection to the shul is much more dependent on the friends/family connection (75%, +38) and to a lesser extent by ritual (38%, +9), than by location (46%, -8), clergy (24%, -4) or children's needs (26%, -11).

Congregants have good friends, feel safe and believe they can get involved at AAC. More than eight in ten members agree with these descriptions of the shul and six in ten strongly agree, making these characteristics clear strengths. More than eight in ten also feel welcome (54% strongly), connected (49% strongly) and know who to contact at the shul (47% strongly).

AAC needs improvement on communications, welcoming new members and creating community and value. While 87 percent of congregants feel a sense of community at AAC, fewer than half (39%) strongly agree there is a sense of community. Eight in ten (83%) generally know what is happening at the shul, but only a third (34%) strongly agree. Impressions on these two characteristics may drive the perception of value – while two-thirds (65%) believe AAC is a good value for the dues paid, not even three in ten (28%) strongly agree. Sixty-seven percent (67%) agree that new members are welcomed, but only 29 percent strongly agree. Among newer members, more than a third (35%) are satisfied with new member programming, while 16% are dissatisfied and half (50%) do not know or have no opinion.

Among the most serious deficiencies at AAC are financial transparency and connection with lay leaders. Only four in ten members (39%) agree that synagogue financial matters are transparent, while a quarter (25%) disagree, including 13 percent who strongly disagree and another 36 percent who do not know enough to determine. Just over half of congregants (54%) think lay leaders work to know members better, but a fifth (19%) disagree and a quarter (27%) are unsure or do not know.

Most congregants are satisfied with ritual practice and Jewish tradition at Agudas Achim. Almost three-quarters of the congregation (73%) wants to see little or no change in the expression of Jewish

tradition at AAC. About 16 percent would like the shul to be less traditional/conservative, while six percent (6%) would like AAC to be more traditional and five percent (5%) are unsure.

When rating specific areas of ritual and observance, members tend to rate what they know very highly. No more than one in ten congregants rate any ritual/service negatively, but many do not have enough experience to rate them or are unconcerned with that area of observance. Congregants are most pleased with High Holiday Services (83% satisfied, 47% very satisfied) and Shabbat morning Services (80%, 41% very). Two-thirds are satisfied with Festival Services (66%, 35% very) but a third (33%) are neutral or don't know. Two-thirds are also satisfied with Kashrut observance (65%, 47% very), and a fifth (20%) are neutral or don't know. Six in ten are satisfied with Friday night Services (60%, 38% very) but three in ten (29%) are neutral or unsure.

High percentages of members are even less sure about the Purim/Megillah reading and Yizkor Services – almost four in ten (38%) have no opinion on these Services. Impressions of daily minyanim are even less defined – half (50%) are neutral or unsure about evening minyanim, and six in ten (61%) have no opinion on morning minyanim.

Sixty-four percent of members (64%) are satisfied with opportunities for congregants to lead services (40% very satisfied), but a third (33%) do not have an opinion. Six in ten (59%) are satisfied with participation of the congregation in group prayer (31% very satisfied), while 36% are neutral or unsure. Almost half (48%) do not have an opinion about participation of youth in the main services, and nearly eight in ten (77%) find it impossible to rate children's services (Noam, Nitzanim, Gan Shabbat and ShaBaby).

Opinions of AAC's clergy are overall very positive, with some divisions showing along age and tenure lines. Hazzan Dienstfrey has held her position the longest, and is extremely popular. More than nine in ten congregants (93%) are pleased with her, including 73% who are very satisfied. Rabbi Rein has just over three years at AAC, and more than three-quarters of congregants are satisfied (77%), including four in ten (40%) who are very satisfied.

Almost six in ten (58%) are satisfied with Rabbi Emeritus Moline, including almost four in ten (38%) who are very satisfied. Nearly eight in ten congregants (78%) feel the clergy know them and almost two-thirds (64%) believe the clergy respond in times of need, but fewer than half (42% and 46% respectively)

strongly agree. Younger and newer members and those who come in the building more often are most pleased with Rabbi Rein, while older, longtime and low-interaction members are less effusive.

Many programs and professionals operate in silos. With the exception of adult programming (60% satisfied, 13% very satisfied) and the especially well-regarded musical programming (67% satisfied, 40% very satisfied), most other professionals and programming are best judged by their specific audiences. The congregation as a whole finds it difficult to rate the Education Director, Preschool Director or their programs. The same is true for Sisterhood and Men’s Club. Executive Director Barry Nove has only been in his role for four months and more than half of congregants (55%) are unable to rate his performance.

Among families with children, there are still subgroups who are part of certain programs but not others, so rating is often difficult. Some may never have experienced that program, or were involved long ago.¹ That said, a third of all families with children (0-age 17) are satisfied with the preschool, and four in ten are satisfied with the religious school and the B’nai Mitzvah experience. Eighteen percent (18%) are satisfied with ATID, a newer and relatively small teen program. Very few congregants have negative feelings about any of these programs; they simply do not know enough about them to rate them, or feel they are not applicable to their current family situation.

This division of age groups is true of all age-focused programming: 44% are pleased with programming for young families, but over half of families with kids cannot rate it, probably because they have aged out. Half (49%) appreciate programming for school-aged families, but 47 percent do not find this offering applicable or do not have an opinion. This same division is evident for youth programming (47%, 48%). Only a fifth of families with children (20%) are satisfied with programming for post-B’nai Mitzvah youth, but seven in ten do not know enough to rate it.

More than half of families with children under 18 (57%) cannot rate children’s services (Noam, Nitzanim, Gan Shabbat, ShaBaby), but almost four in ten (37%) are satisfied. Over half of families with children (55 percent) are pleased with Education Director Chaya Silver, who has a good bit of interaction with many congregants through Shabbat morning programs – only a third cannot rate her performance. Fewer families with older children know Jen Halpern – two-thirds cannot rate her job as Preschool Director.

¹ Our sample size is too small to look at just preschool families, just religious school families or any other subset.

Few families with children have anything negative to say Religious School or Preschool communications, and families are quite pleased with the school wing (63% satisfied) and the playground (87% satisfied).

Six in ten women (61%) are pleased with Sisterhood, including almost a quarter (23%) who are very satisfied. Less than one percent of women are dissatisfied with Sisterhood, but more than a third of women (36%) are unable to rate it. Four in ten men (39%) are happy with Men's Club, and only five percent are dissatisfied. However, 57 percent of men do not have enough experience with Men's Club to rate it.

A paucity of programming leaves members unable to rate their satisfaction in many cases. Many congregants simply do not see programming geared to their needs. Among younger members, only 16 percent are satisfied with programming for young adults; nearly three-quarters of them (73%) do not have an opinion, probably because they do not see much programming they feel would fall in this category.

Members without partners are dissatisfied with programming for singles. More than four in ten are unhappy, including 24 percent who are very dissatisfied. Almost half (49%) are neutral or unsure how to rate singles programming at AAC. Six in ten (60%) of members age 46-66 are unable to rate programming geared toward empty nesters. Seniors are somewhat split on programming at AAC geared toward their age cohort. Forty-three percent (43%) are satisfied, including one in five (19%) who are very satisfied. Eighteen percent (18%) are dissatisfied (5% very dissatisfied). Four in ten (41%) are unsure or neutral. Many members are unsure how to rate programming for interfaith families (79% cannot rate) and LGBTQ families (88% cannot rate).

Opinions about learning and community programs depend mainly on exposure. Most have likely heard the Rabbi give a sermon and opinions about sermons are the most defined. Six in ten (59%) are satisfied with the Rabbi's sermons, including 24 percent who are very satisfied and a fifth (22%) who are dissatisfied. Almost two-thirds of members (65%) are pleased with holiday programming (31% very satisfied). Six in ten (61%) are satisfied with social events (19% very satisfied), but a third (32%) do not have an opinion. Over half of congregants are pleased with social action programs (52%, 30% very), Scholar-in-Residence learning (52%, 26% very) and Chevra Kadisha support (53%, 40% very) but in each case more than four in ten congregants are neutral or unsure.

Half of members (49%) do not know enough about Bikkur Cholim to rate it and more than six in ten (62%) have not had enough exposure to AAC's Israel programming to have an opinion yet.² Seven in ten congregants cannot rate Torah/Talmud study (69%) or drop-in learning opportunities (70%).

Traditional communication platforms work, but AAC needs more emphasis on newer digital media. At least three-quarters of congregants are satisfied with longtime communication efforts such as the Monthly Bulletin, Shabbat announcements, High Holiday mailings and handouts, and the Directory. For all of these, more than four in ten congregants are very satisfied. Weekly emails are quite successful as well (81% satisfied, 46% very satisfied). However, only six in ten (59%) are satisfied with the website, and just a quarter (25%) are satisfied with AAC's social media efforts. This is probably mainly due to lack of use, interest or awareness – 29 percent have no opinion on the website and almost two-thirds (64%) are unable to rate AAC's social media presence.

Members are mostly satisfied with the synagogue building and grounds. Eight in ten congregants or more are satisfied with the Cohen Sanctuary, the Flax Chapel, the Bill Davis Sukkah Courtyard and the landscaping around the building. Those who are very satisfied with these physical features range between 39% (landscaping) and 49% (Sanctuary). Almost three-quarters (74%) are satisfied with the Social Hall/Lainoff Auditorium (31% very satisfied), and seven in ten are satisfied with the lobby (30% very satisfied) and restrooms (33% very satisfied). Congregants believe the Social Hall and restrooms need the most improvement (15% dissatisfaction respectively). While two-thirds (65%) are satisfied with the Schonberger Library, a quarter (26%) have trouble rating it.

Kiddush is community building. Seven in ten congregants (71%) consider a light lunch for Kiddush important, including 37 percent who believe this is very important. A quarter do not feel having a Kiddush lunch is important, including eight percent (8%) who do not think it is important at all. Frequent shul attendees care more about Kiddush lunch than those who come in the building less often. Married members are much more likely to find Kiddush lunch important than those without partners. Mid-tenured members value Kiddush lunch more than newer and longtime members.

Three-quarters of AAC members (74%) are satisfied with the kitchen/food service at the shul, including almost four in ten (38%) who are very satisfied. Twelve percent (12%) are dissatisfied with the kitchen. Seniors are much more satisfied with the kitchen (83%) than the youngest members (59%). Frequent

² Congregants were surveyed just as the new Schlicha's programming was being announced and getting underway.

attendees and members without children are more satisfied with the kitchen/food than those with kids or those who come into the building less frequently.

AAC members want more learning and innovative services. Multiple responses were allowed, but when asked what they would be interested in having at Agudas Achim, more than four in ten (43%) indicated that Hebrew language learning was important to them, about the same want to partner with other synagogues on programming (38%), and a quarter (25%) expressed interest in virtual learning online. Meditation/non-traditional services (32%), services with musical instruments (36%) and an increased focus on spirituality/Renewal (32%) were among the other popular potential changes. A quarter (24%) support a later Friday night service, 22% want Family services and 21% would like to see more programming outside of the AAC building.

Methodology and Demographics

Survey participation was very good. Over 300 surveys were completed (303 exactly), which is 66 percent of AAC's non-Associate member units and 61 percent of total member units. There were a few families where two household members participated, but 303 surveys represents 33 percent of all adults over age 18 in the congregation – still an impressive completion rate for a non-incentivized survey.³

Respondents are 65% female and 33% male. More than three-quarters (78%) are married/partnered, nine percent (9%) live in interfaith households, eight percent (8%) have an LGBTQ family member and almost half (48%) have children under 18 living at home.⁴ Of those with children, one in three (29%) have at least one child in the Preschool, over half (53%) have at least one child in the Religious School and seven percent (7%) have at least one child in Jewish Day School.⁵

Age representation in the survey closely matches AAC actual member unit ages.

	Actual membership	Survey Participation	Difference
Age 24-34	1%	1%	--
Age 35-45	17%	19%	+2

³ Survey was open from September 10th through October 27th. All but three respondents participated online.

⁴ According to the AAC Fact Book, there are about 182 families with children under 18 in the congregation, about 41% of the congregation, meaning those with children at home were more likely to participate than those without children (52% of survey respondents do not have children at home, compared to 60% of the actual member units).

⁵ This means about 2 percent of all member units have child(ren) in the Preschool, 11% have child(ren) in the Religious School, and 2 percent have child(ren) at Gesher.

Age 46-55 ⁶	14%	23%	+9
Age 56-66	19%	22%	+3
Age 67-74	21%	20%	-1
Age 75+	12%	10%	-2

⁶ There was an error in the survey: the age category for 56-59 was missing, respondents chose either the older or younger category, or might not have answered (5% did not give a response for age).

Appendix 4: Task Force Reports

Agudas Achim Congregation Strategic Planning Task Forces, 2018				
External Communications and Marketing	Member Engagement / Internal Communications	Spirituality, Prayer & Learning	Leadership & Governance	Operations, Finance & Facilities
Marya Runkle	Rabbi Rein	Hazzan Dienstfrey Chaya Silver	Rabbi Rein	Barry Nove Jen Halpern
Jim Robbins	Ann Bennett Ilana Rothberg	Rachel Goldberg	Meredith Ludwig	Nicole Yakatan
Andrew Cohen	Mindi Maline	Mike Scheinberg	Larry Altenburg	Elliot Parkin
Andy Effron	Janet Barnett	David Blumenstein	Joel Goldhammer	Beth Robbins
Alex Perry	Ellen Bayer	Doug Fagen	Rebekah Hersch	Lynne Sandler
Arnie Rosenblatt	Renee Berman	Nancy Hailpern	Shai Korman	Philip Schoenberger
	Dan Minz	Naffer Miller	Miriam Krieger	Nancy Siegal
	Marilee Perkal	Vic Tynes		Marc Wilson
	Jane Shichman	Pablo Zylberglait		

Leadership and Governance

Draft Task Force Report to the Strategic Planning Steering Committee

Task Force Membership

Larry Altenburg
 Joel Goldhammer
 Rebekah Hersch
 Shai Korman
 Miriam Krieger
 Meredith Ludwig
 Rabbi Steven Rein
 Context

Mission statement: Our overall goal is to govern fairly and responsively with an openness that allows all AAC members to be informed about operations, policies, and practices and to participate in the process according to their interest and capacity. To enable this participation throughout our congregation, the Board establishes and reinforces a culture of hospitality and service. Our Board should enable AAC to be a comfortable home to our conservative Jewish congregation which provides our congregants with a broad array of opportunities (education, ritual and observance, social interaction) and access to community action and support services.

Strengths

We have a vibrant community thanks to meaningful relationships with our ecumenical and community neighbors; outreach by our Rabbi and Hazzan and members; and initiatives created by young family leaders, Youth services leaders, and by our social action committee.

We recognize that our Board and its committee structure are not currently designed to ensure that AAC demonstrates our covenantal commitment to meet the needs of each of our congregants or even all of our congregational affinity groups. We commit ourselves to planning and implementing improvements which specifically address the gaps our Board needs to close in order to actively and responsively support the congregation. We further propose that we make improvements in the communication about the Board and Board decisions to the congregation and develop processes which support member input.

Weaknesses

The Board is not as productive as it needs to be for a number of reasons:

- Lack of orientation and training for Board members regarding the By-Laws, Constitution and Board processes
- Lack of understanding of Board members as to their responsibilities, time commitments, accountability and norms, such as confidentiality
- Lack of full and meaningful governance policy, resulting in policies and procedures which are not well known or understood and therefore, not followed
- Inefficient size relative to performance (need a size that represents responsibilities and representation)
- Lack of consistent mechanisms to measure ourselves, our leaders, and our staff
- Lack of sufficient support for committee chairs and ineffective committee structures
- Vague and/or overlapping committee and officer responsibilities
- Unnecessarily complex staff interface and oversight structure (e.g., performance appraisals for staff)
- Lack of Parliamentary leading to lack of discipline and process
- No operational connectivity between Operating oversight and Strategic intent
- No leadership succession plan or Board development plan
- No continuity model
- Lack of process to engage congregants in goal setting and innovation decisions
- The Board currently is not seen as open, or accessible.
- Members perceive decisions are made without input from the membership.

- Board service is not seen as desirable by the vast majority of members and is not rewarded adequately.

Data Collected from the Strategic Planning Interviews, Survey and Community Conversations

According to our survey of congregational participation, interests, and preferences

- Our members report they use our facilities (52% of AAC members come into the building at least once a week) and are willing to participate in ways that support our mission (71 percent report they have served in a volunteer capacity in the last three years).
- About 50% percent of congregants feel welcome, connected, and know who to contact at AAC.
- Congregants who are frequent visitors to the building report being much more satisfied with the synagogue than those with moderate or low interaction.
- Areas for improvement identified in the survey and in community conversations include:
 - Communications
 - Welcoming new members
 - Creating community
 - Promoting Community values
 - Financial transparency
 - Connection with lay leaders

According to those participating in our community conversations, the following needs were identified:

- Improving fundraising approaches and results
- Balancing budget successfully
- Preparing financial reports which communicate financial status clearly
- Improving the way information is collected, maintained and accessible to support the services we must provide, such as food events and life cycle events
- Engaging volunteers productively
- Improving and maintaining facilities
- Communicating information about operations that help congregants understand the costs, need to maintain the physical and human resources

Leadership & Governance Taskforce Objectives

- Governance Policy
- Leadership Development and Succession Planning
- Goal setting and innovation are incorporated within the objectives of governance and leadership

Objective 1: Examine, evaluate and update the governance structure of the Congregation to align to the Congregation's needs and enable the Congregation to fulfill its vision.

In order for the governance of the Congregation to enable progress and support the evolving needs of the various members, the structure (including the governing documents and policies as well as the Board of Directors) must be examined, understood and followed.

We propose, through this strategic objective to

- (1) Clarify the governance structure of the Congregation by reviewing and identifying the framework of governance.
- (2) Evaluate the effectiveness of the governance structure and provide a means through which the governance structure can promote accountability and transparency.

Action, Objective 1: What will we do to clarify the AAC governance structure?	Capacity/Challenge: What do we need to accomplish this and what are the challenges to consider?	Timeline: How long will it take to accomplish this action?
<p>Conduct a review of the Constitution and Bylaws with a view to determining their applicability to the current operating environment of AAC.</p> <p>Identify provisions of the Constitution and Bylaws with which we do not currently comply and determine whether changes should be made to the governance practices or to the governing documents.</p> <p>Develop an expectation and commitment among leaders to know and understand the Constitution and Bylaws.</p>	<p>Need volunteers who are knowledgeable about the Congregation and its needs.</p> <p>Not all volunteers are willing to take the time to fully understand the Constitution and Bylaws.</p>	<p>Medium to Long-term: Timeline would depend on whether amendments to the Constitution are required.</p> <p>It is possible to conduct a review of the governing documents that would not result in proposed amendments to the Constitution.</p>
Action, Objective 1: What will we do to clarify the governance structure?	Capacity/Challenge: What do we need to accomplish this and what are the challenges to consider?	Timeline: How long will it take to accomplish this action?
<p>Create user-friendly governance documents that can be used and referenced by Congregants and leaders. Specifically, adopt a Corporate Governance Policy that can be amended by the Board of Directors that establishes the more practical elements of governance (e.g., ad hoc committees, structure of meetings, etc.).</p>	<p>This would depend on the ability to get a volunteer with experience drafting policies.</p> <p>Members of the Board would have to commit to understanding and abiding by the provisions of the policy.</p>	<p>Medium term: Because this document could be amended by the Board, there is flexibility to put something in place in the short term with a view to growing it and enhancing it over time.</p>
Action, Objective 1: What will we do to improve the governance medium, the Board of Directors, and the way it functions?	Capacity/Challenge: What do we need to accomplish this and what are the challenges to consider?	Timeline: How long will it take to accomplish this action?

Examine the Board structure with a focus on a more effective size.	<p>Consider the number of people, their roles, the work of the Board (goals) and the election cycle. What is the optimal number to accomplish Board's work? What size Boards seem to operate most efficiently? Should we change our Board construct to move in that direction? How and how rapidly? By What mechanism? The current Board is defined at 26 members by position and appointment. This is too high to be an effective or efficient committee.</p> <p>Consider other Board and committee structures that would enable a reduced size with appropriate representation. (e.g., Executive Committee, Administrative Committee comprised of affinity group representatives, small Board of Directors with a larger group of Trustees, etc.)</p> <p>Assess the terms of office for all positions deemed as Board positions, including their length, starting points, etc.</p>	Long-term: This requires revisions to the Constitution and By-Laws.
Action: Objective 1: What will we do to improve the governance medium, the Board of Directors, and the way it functions?	Capacity/Challenge: What do we need to accomplish this and what are the challenges to consider?	Timeline: How long will it take to accomplish this action?
Examine the composition of the Board, evaluating the efficacy and value of the current positions. Determine what positions should have a seat on the Board and why.	<p>Consider who is represented and who is not in our current structure.</p> <p>Define the role of each position more clearly than what is currently written in the Constitution and By-Laws</p> <p>Members have felt that all affinity groups, cohorts, etc. should have a seat on the Board</p> <p>What communities or initiatives within the AAC community need</p>	Long-term: This requires Constitution and By-Laws revisions

	to be represented on the Board? Define clear and appropriate reporting relationships between each Board Member to the President and the senior professional staff.	
Action: Objective 1: What will we do to improve the governance, with a focus on leadership from the Board's perspective?	Capacity/Challenges: What do we need to accomplish this and what are the challenges to consider?	Timeline: How long will it take us to accomplish this action?
Examine the responsibilities of the Board vis-à-vis individual lay leaders or professional staff.	Define what topics should be Board decisions and what can be delegated to individual lay leaders, committees, or professional staff. Focus the Board on strategic issues, rather than operational activities or minutiae. Empower individual lay leaders and professional staff to make decisions appropriate to their stations.	Medium term: This can be the work of the executive committee in monthly meetings.
Action: Objective 1: What will we do to improve the governance, with a focus on communication from the Board's Perspective?	Capacity/challenge: What do we need and what are the challenges?	Timeline: How long will it take us to accomplish this action?
Examine the communications mechanisms used by the Board to describe its activities and engage the Congregation. Use technology to improve feedback, engagement, and accessibility to Board activities. Have two congregational meetings a year; make one meeting more of a celebration	Board generally relies on the Bulletin, the annual membership meeting, and dues mailings to communicate to the Congregation. The Board should identify and use new means to more frequently and effectively communicate with the membership. (Website, Bulletin, weekly announcements, email, etc.) The congregation is interested in participating in the development of Board and synagogue goals, agenda-issues, and they want access to information about the Board	Short term: Consider what decisions can be made by the President by Constitutional authority. Medium term: Consider how to improve communications with ongoing review and course corrections. Long term: Revise constitutional requirement regarding congregational meetings.

of what has been accomplished with a dinner and recognition for outstanding contributions The end of year report, which is described as the state of the shul report, should include committee reports highlighting what we have accomplished as a Board and as a congregation.	decisions. Congregation members often express a desire for transparency, although it is not always clear what information they want or need or how to filter what is appropriate to share with congregants.	
Action: Objective 1: What will we do to improve the governance, with a focus on order and communication at the Board meetings?	Capacity/challenge: What do we need and what are the challenges?	Timeline: How long will it take us to accomplish this action?
Appoint a Board member to serve as Parliamentarian to facilitate more effective and efficient Board meetings.	Lack of qualified volunteers	Short-term : A Parliamentarian can be appointed by the President by Constitutional authority
Action: Objective 1: What will we do to improve the governance, with a focus on goal setting and monitoring progress?	Capacity/challenge: What do we need and what are the challenges?	Timeline: How long will it take us to accomplish this action?
Formalize a periodic goal-setting and goal-evaluation process by the governing bodies and leaders of the Congregation. Make goal-setting a mandatory part of leading, and have a process in place whereby goals are set, agreed to, measured against, held accountable for and evaluated on a periodic basis (should be no less frequently than annually). Committees should set formal goals, have those goals approved by the Board, and be measured against those goals.	Finding dedicated volunteers could be a challenge; however, those currently serving in governance capacities should be able to complete a process for annual goal setting without too much more of a time commitment. People would have to be willing to be held accountable for meeting their stated goals.	Medium term: Although this would be a part of an annual process, it requires planning which can be done in the medium term.

As we improve our governance policy and procedures, examine our Board operations and accessibility and accountability, and improve the way our congregation participates in governance and leadership,

we have an opportunity to create a leadership culture which encourages innovation and participation in goal development and accomplishment.

Objective 2: Clarify, design, adopt, communicate and sustain core leadership principles for the AAC community.

Leadership principles encompass the behavior, participation, development and support of AAC members and staff, as each or all are engaged in the role of leader in some area/domain.

We propose, through this strategic objective to

- (3) Clarify our understanding of what it means to be a leader in all domains of the community (i.e., staff, clergy leaders, Board leaders, and members).
- (4) Building on this understanding, we plan to communicate the expectations and opportunities for leadership through (a) operations and activities (i.e., by personal example, welcoming strangers, participation, Tikun Olam); (b) mechanisms (i.e., leadership succession plans, professional development); and (c) opportunities for innovation and participation in goal development and rewards.

Action, Objective 2: What will we do to clarify, agree upon and adopt Leadership Principles?	Capacity/Challenge: What do we need to accomplish this and what are the challenges to consider?	Timeline: How long will it take to accomplish this action?
<p>Gather together examples and expressions of principles/expectations and expectations from our clergy, employees, Board and volunteers regarding leadership.</p> <p>Interview past leaders of AAC for their perspective on leadership, engagement, and support of leaders, staff, and clergy.</p> <p>Arrange a meeting among Board and staff to discuss and agree on a set of operating and behavioral principles of AAC leadership qualities and objectives.</p> <p>Once principles are agreed upon, develop ways to express and reinforce broad, universal understanding of these</p>	<p>As a reference, consult the set of conduct and behavior principles created for the Board in 2015 along with other similar sets of principles.</p> <p>Challenge: Our approach should address all areas of our community by working across all areas of operations and governance. The Board should not adopt principles in a vacuum, on its own which will affect leaders, staff, clergy and members.</p> <p>Challenge: We commit to producing materials which explain our leadership principles. However, we may have difficulty finding the right medium to express these principles.</p>	<p>Short term: Gather the materials and present these examples to the Board, staff and clergy for review and discussion.</p> <p>Medium term: Hold meetings (Board, staff together) to discuss and establish a set of guiding principles for our community and discuss ways to communicate them to the broad AAC community.</p> <p>Long term: Disseminate the principles to the community and employ them in committee, Board, and membership gatherings.</p>

principles throughout the community.		
Action: Objective 2: What will we do to communicate and implement the Leadership Principles, with an emphasis on finding, developing and acknowledging leaders?	Capacity/Challenge: What do we need to accomplish this and what are the challenges to consider?	Timeline: How long will it take to accomplish this action?
<p>Develop an innovative approach to recruit, engage and acknowledge leaders which emerges from our principles: what do we mean by opportunities for leadership; how do we think about and recognize leaders in our community?</p> <p>Examine current approaches to recruiting for all volunteer and paid positions, including job descriptions, performance assessment, and use of system for recruitment and hiring.</p> <p>Examine current approaches to recruit members to Board and committee positions.</p> <p>Communicate the information about opportunities and rewards of leadership to all AAC members and staff.</p>	<p>Engage all Board members and staff in communicating about how to recruit members for leadership positions and acknowledge members as leaders (who are already engaging as a leader).</p> <p>Challenge: Changing the way we develop the list of job qualifications, advertise opportunities, review nominee qualifications, conduct performance assessment, and reward accomplishments.</p> <p>Challenge: Making a cultural change by valuing and appreciating the contributions of members as leaders by the full congregation. To accomplish this, we may need to marshal support to demonstrate that engagement and leadership (and the reward of leaders) is a Jewish value.</p>	<p>Short term: Solicit views on how to identify candidates for leadership involvement and how to reward leaders from the Board, committees, and staff.</p> <p>Medium term: Examine and develop or improve recruiting, nomination, and performance review approaches with the goal of improving opportunities for member to engage in leadership roles, for leaders to be better supported in executing leadership roles, and for improving the efficiency and effectiveness of our leadership performance.</p> <p>Long term: Make Leadership (Serving Supporting and Appreciating) part of the culture and brand of AAC. Make lay leadership the fulcrum of achieving our congregational objectives.</p>
Action: Objective 2: What will we do to support Leadership Development and Succession Planning?	Capacity/Challenges: What do we need to accomplish this and what are the challenges to consider?	Timeline: How long will it take us to accomplish this action?

<p>Develop an approach to support the succession of leaders through the activities of volunteer groups, the involvement of members in committee participation and Board participation.</p> <p>Identify opportunities to provide development for leaders according to their positions and needs.</p> <p>Implement annual orientation activities for Board members.</p> <p>Implement development of useful background books and resources for committee chairs and Board members.</p>	<p>Capacity: We have many AAC members who want to volunteer.</p> <p>Challenge: We are not organized in a way that capitalizes on the opportunities, the tradition of volunteering in families, or the willingness of individuals.</p> <p>Challenge: We do not have a library of development materials to prepare individuals for service on committees or the Board.</p>	<p>Short term: Coordinate work with the review of Board committees, with the idea that succession may be grounded in the voluntary participation of many congregation members.</p> <p>Medium term: Convene committee chairs and work together on an approach to developing resources and succession plans.</p> <p>Long term: Develop a plan for succession that recognizes the history of participation in families and in groups (such as young families). Develop a plan for professional development building on available resources in the USCJ community.</p>
Action: Objective 2: What will we do to assess progress in implementing Leadership Principles?	Capacity/challenge: What do we need and what are the challenges?	Timeline: How long will it take us to accomplish this action?
<p>As we develop a process, measures and metrics to document the extent to which we implement our decisions and policies, include attention to how well we implement Leadership Principles and the related actions, including recruiting, engaging, developing and rewarding leaders.</p>	<p>Plan to gather feedback as part of an annual Board review and gather congregational through a feedback instrument.</p> <p>Gather data about whether succession planning is working: for example, is the nomination committee able to identify and recruit members for leadership positions for the Board? Are committee chairs building a membership that will feed into a chair's pipeline?</p> <p>Challenge: Gathering feedback is time-consuming. However, committee chairs and Board members could make this part of their routine reporting.</p>	<p>Long term: Clarify expectations, develop metrics related to our Leadership Principles and assign responsibility for gathering and reporting data annually.</p>

Operations and Finances

OFF Task Force (Operations, Finance & Facilities) Strategic Planning Objectives & Recommended Actions: ⁷

Task Force Membership:

Nicole Yakatan, Elizabeth Robbins (chairs), Barry Nove and Jen Halpern (staff), Marc Wilson, Nancy Siegal, Phil Schonberger, Lynne Sandler, Elliot Parkin, Stan Blacker

Situation Overview:

In the last five years, there has been a staffing change in every synagogue role (professional and admin) except for the Hazzan. This turnover has created a lot of uncertainty among Agudas Achim congregants about the shul's financial situation and operational systems.

In both the congregational survey and community conversations, congregants emphasize the need for transparency, especially on financial matters. Procedures/operations and fundraising/financial management and strategy should be reviewed, documented and shared with the congregation in easily understandable form to: 1) ensure excellence and efficiency from the shul; 2) connect needs/wants with costs; and 3) promote emotional and sustainable financial support from congregants.

While three-quarters of congregants are satisfied with the building and grounds, staff, board and frequent users of the building recognize that facilities maintenance and capital investments have been routinely neglected, largely due to perceived lack of resources. Increased focus, planning and strategy around maintenance and capital improvements is warranted to meet congregational needs.

OPERATIONS

Strategic Objectives:

Create a model of operational excellence

Strive to offer a high level of customer service

Ensure efficient operations

Actions/Recommendations:

1. Examine Overall Staffing Needs Based on Congregational Priorities

- Establish Operations/Admin Advisory Committee of 3-7 people [Board] - 1
- Redo org chart with accurate reporting structure [ED, Board] - 1
- Update job descriptions/responsibilities for all positions; make available to board/congregants (not public) [ED, Rabbi, Board] - 1
- Investigate need to institute full-time office support staff [Board] - 2
- Review kitchen staffing and operations [Board, Exec Committee] - 2
- Research feasibility of adding Program Manager OR program manager duties to current staff [Board] - 2

⁷ Action steps are bullet points, [People/groups with primary responsibility in brackets] Priority = 1 (most urgent/within next 12 months), 2 (medium priority), 3 (lower priority)

- Update “Who do I call” for congregants [ED, admin staff] - 1
2. Institute regular member demographic reporting to board
- Establish *annual* affirmation of membership from every congregant household [ED, Financial VP] - 1
 - Actual member count (& dues accountability) for each member category [ED, Financial VP] - 1
 - Enhance database of members (i.e. demographics, special skills, giving history) [Admin Committee, ED] - 3
 - Create list of desirable special skills to query congregants (i.e. fundraising experience, Hebrew teachers, etc.) [Admin Committee, ED] - 3
3. Budget resources for annual professional training/development/coaching for staff [Budget Committee] - 1
- Program management, Volunteer development & Fundraising
4. Budget time/resources for development/training/workshops for Board members and potential board members [Budget Committee]
- Board expectations briefing [Executive Board, Full BOD] - 1
 - Program management [President, Exec Committee, Full Board, ED] - 2
 - Volunteer development [President, Exec Committee, Full Board, ED] - 2
 - Fundraising and budgeting [President, Exec Committee, ED, Full Board] - 1
5. Operational Procedures
- Update Policies and Procedures book
 - o Examples: “Gift Acceptance,” “Prep for High Holidays,” etc.) [ED, Admin staff, Admin Committee] - 1
 - Establish communications “rules” and “flow chart” [ED, Admin staff] - 1
 - Make Annual report available to board/congregants (not public) [ED] - 1
 - Outline, streamline and publicize the “Calendar process” [ED, Admin staff] - 1

FINANCE

Strategic Objectives:

Create a model of financial sustainability

Ensure efficient budgeting, dues, other structures to support financial health of the congregation

Ensure increase in Endowments; revisit & promote “Create a Jewish Legacy” program

Increase financial transparency

Develop communication vehicles and training opportunities to share info about shul ops/finance

Create a culture of fundraising among staff and board

Recommendations:

1. Revamp committee structure/requirements to strengthen finance/budget process
 - Financial VP appoints people for finance committee (ideally 7 people) [Financial VP] - 1
 - Create a formal budget committee (with some finance committee overlap) [Financial VP, Board] - 1

- o Membership on these committees will help establish “path to Board membership”
2. Conduct annual review and periodic audit [ED, Financial VP hire external firm] - 1
 - Build into budget [Budget Committee] - 1
 3. Develop better annual presentation and explanation of Agudas Achim financials
 - Report out findings to board and congregation by “classes” with income & expenses [ED] - 1
 - Annual report/New spreadsheets/reporting protocol in graphical form [ED] - 2
 - Establish “Communications Advisory Committee” to test understanding/clarity [Board] - 1
 - Presentation training (Sulam) [Financial VP, Exec Board] - 2
 4. Enhance funding & reserves
 - Deposit 50% of undesignated funds into short term & long term reserves for capital improvement reserves [Exec Committee, Financial VP, ED] - 1
 - Require BOD to report annually on status of reserves in context of most recent reserve study [Exec Committee, Financial VP, BOD] - 1
 - Establish new funds: “Kiddush Fund” & “Bricks & Mortar Fund” [ED, Admin staff] - 1
 - Increase dues to cover current operating costs [BOD] - 1
 - Implement regular/annual dues increases “greater of 5% or CPI” on all fees (dues, and also: school fees, b’nai mitzvah charges, “basic kiddush,” etc.) to ensure sustainable revenue to cover costs [BOD] - 1
 - o Inform congregants of true operating costs [BOD] - 1
 - o Compare to other shuls on regular basis to check on dues levels [BOD] - 3
 5. Formally integrate fundraising into board, staff & committee roles
 - Appoint board member as “Development Chair” with committee of 3-7 [BOD] - 1
 - Develop a centralized fundraising plan/strategy [Dev Chair, Dev Committee, ED] - 1
 - Create, maintain and publicize a “targeted” or “motivated” giver “Wish List” [Dev Chair, ED, Dev Committee] - 1
 6. Promote legacy giving to strengthen Endowment
 - BOD takes leadership role in participation/promotion of legacy giving [BOD] - 1
 - Establish and publicize plan for legacy donations [Development Chair, BOD] - 1
 - Formally integrate Barry Nove into legacy giving effort [ED, BOD] - 1

FACILITIES

Strategic Objective: Create a 5-10 year plan for capital investments that can be updated every few years, in order to foster long-term planning and encourage philanthropy.

Recommendations:

1. Bolster Building & Grounds Committee [B&G, Exec Committee] - 1
 - Membership of 3-7 people including the chair
 - Advisors for specific projects/areas as needed

2. Conduct a reserve study (action items, timeline and projected cost). [B&G Committee, ED] - 1
 - Recommend dedicated funding from dues (i.e. 1-2%) & included in budget
 - Include preventative maintenance schedule/cost for building interior, exterior, systems, landscaping and grounds
 - Include annual repair costs: roof, plumbing, electrical, HVAC, sound, etc.
 - Include routine renovation and replacement schedule: lighting, reroofing, HVAC replacement, recarpeting, reflooring, repainting, window replacement, concrete and asphalt replacement, planning costs, and other large ticket items.

3. Conduct building usage study to determine needed facility upgrades and expansions. [B&G Committee] - 2
 - Solicit/incorporate feedback from all stakeholders
 - Incorporate recommendations of the Security Assessment by the City of Alexandria Police (balustrades, etc.)

4. Create capital improvement plan (estimated cost and timeline) to include: [B&G Committee, ED] - 1
 - Two additional retractable panel walls to subdivide the social hall.
 - Explore expansion of education wing, planned since 1957, for additional classrooms, storage, gathering space.
 - Expansion of the kitchen to accommodate catering needs, separate meat/dairy areas, and outdoor refrigeration/freezing.

5. Manage income from “Bricks & Mortar/Building & Maintenance Fund” (see FINANCE); [B&G Committee] - 1
 - Conducts preventative maintenance, repair and renovation/replacement, per reserve study.
 - Pays for capital improvements.
 - Provides Board the capital improvement plan.
 - With Board approval, publicizes specific needs to the community to encourage philanthropy.

Spirituality, Prayer and Learning

Chair: Rachel Goldberg

Members: Elisheva Dienstfrey, Doug Fagen, Rebecca Halloran, Nancy Hailpern, Naffer Miller, Mike Scheinberg, Chaya Silver, Vic Tynes, Pablo Zylberglait

Situation Analysis

Agudas Achim's Current Situation

Of the three Jewish congregations in Alexandria, Agudas Achim Congregation is the only Conservative synagogue. Others are Beth El, Reform, and Chabad. The nearest Conservative congregation is Etz Hayim in Arlington (about 10-15 minutes by car) and Olam Tikvah in Fairfax (about 20-25 minutes by car).

AAC has 490 member units, a decline of nearly 50 member units from 10 years ago.

Agudas Achim holds twice daily minyanim that are traditional Conservative style worship using the United Synagogue siddur (Sim Shalom) and humash (Etz Hayim). Weekday minyanim are egalitarian and mostly lay led. The congregation has a core group of lay Torah readers and shlichai tzibbur (prayer leaders). It is difficult to get a minyan on some weekday evenings and regular attendees often call members in the neighborhood to get to 10. In winter or during summer vacations, it can be a challenge to make a minyan in the morning as well. Clergy and professional staff do not attend daily minyanim regularly.

In the summer, when Shabbat starts late, the Agudas Achim band will offer a concert or musical kabbalat Shabbat service, but otherwise, instrumental music is not used in worship (except with the monthly Sha-baby program for 0-5 year olds). Occasionally, a learners or meditation minyan is held on Shabbat morning parallel to the service in the main sanctuary.

Shabbat morning services without special events (bar/bat mitzvah, themed or guest speaker) have an average attendance of about 170 worshippers, compared to an average of 250 people 10 years ago. The liturgy and practice follow traditional egalitarian Conservative style led by a full time Rabbi and Hazzan. Torah reading follows a triennial cycle and is read by members of the congregation. A small group of volunteer gabbaim rotate weekly and they assign available honors. A Gan Shabbat program — entirely lay run by volunteer parents parallel to the main service — is for families with children ages 0-5. Kesher (K-2nd) and Noam (3rd-6th) services usually convene in the Chapel, or religious school wing when other alternative services are offered in the chapel. Attendance at these programs fluctuate weekly. Children are asked to attend 15 Shabbatot a year.

The average b'nai mitzvah class comprises 12-18 students who typically study haftarah with a tutor for 12 weeks and then maftir, parts of the Shabbat service or other Torah reading with the Hazzan for another 12 weeks. B'nai mitzvah students also participate in a lifecycle course, family mini course, Shabbat discussion group, and an individual mitzvah project.

Pre bar-mitzvah students are educated Jewishly through the synagogue's religious school program (about 120 students, k-6), preschool (70 students, ages 2-5) or ATID teen program (6 enrolled students

this year). Agudas Achim does not offer a confirmation program. Youth can also connect via youth groups — USY, Kadima, Machar and Shores — which are led by an adult advisor.

The synagogue offers a variety of adult education programs taught by the Rabbi, Hazzan, Shlichah, congregants or other invited guests. Attendance varies from a handful of participants up to 25 on average. Classes convene on a weeknight or on Shabbat following services and kiddush, with the exception of Torah study which meets before services on Shabbat morning, a weekday Hebrew class and Friday morning Talmud class. Classes are publicized via a booklet which is distributed on the seats for High Holidays, promoted in Shabbat announcements, on the synagogue website and through AAC's weekly email.

Challenge

Our challenge is to find ways to heighten the spiritual engagement and fulfillment of congregants; improve adult attendance at classes and programs; offer classes or workshops that interest congregants; elevate Jewish observance among congregants; break down silos in programming, worship and education; strengthen the b'nai mitzvah program; engage youth in services and learning; and support religious school education.

AAC's Vision (as it impacts Spirituality, Prayer and Learning)

Working Vision Statement, February 2018

We are a community built on covenantal relationships. Each and every day we elevate and nourish the mind and soul while building community. We care about each other, we care about strangers, we care about Israel, and we care about YOU.

Spirituality and Prayer and Learning

- **We imagine** Shabbat and holiday services that elevate/nourish the mind and soul while building community
- We hope to create more opportunities for learning – explore congregational appetite for learning
- We want to make prayer and ritual more accessible and to elevate observance
- We would like to enrich our offerings and/or experiment with different modalities and experiences for prayer services, spirituality and with music
- Our goal is to help membership bring spiritual and ritual practices into the home
- We want to ensure that our youth, P-12 are engaged in meaningful learning opportunities
- We are committed to lifelong learning, beginning in preschool and continuing throughout a member's affiliation

Strategic Planning Objective

How can we use Spirituality, Prayer and Learning to nourish the mind and soul, build community, express care for others and connect with Israel?

Develop a number of strategies, supported by specific actions, that AAC should take to:

- Offer Shabbat and holiday services that elevate and nourish the mind and soul while building community
- Create more opportunities for learning – explore congregational appetite for learning

- Help make prayer and ritual more accessible and elevate observance
- Enrich our offerings and/or experiment with different modalities and experiences for prayer services, spirituality and with music
- Help membership bring its spiritual/ritual practices into the home
- Ensure that our youth, P-12 are engaged in meaningful learning opportunities
- Our commitment to lifelong learning begins in preschool and continues throughout a member's affiliation

Be specific about each recommendation with regard to:

- Action (what specific steps are needed to complete the task)
- Capacity (who should be involved? what resources are needed? how much will it cost to complete? how complex is the undertaking?)
- Timeframe (when is a realistic and achievable completion date for the recommended action?)

LEARNING

Strategic Objective #1: Improve community building, increase engagement, and elevate spirituality by: (1) offering a comprehensive Jewish learning framework, including an annual calendar of learning objectives within that framework; and (2) enabling customized learning experiences to accommodate individual needs.

Action What?	Capacity Who? How much? How complex?	Timeframe When?
Action #1: Step 1: Create a sort of Jewish “ Khan Academy ” of perpetual learning. Formulate a set of core Jewish Learning Areas (JLAs) to guide the learning process and provide context, a sense of progress, and a feeling of achievement. David: Are there other ready-made curricula?	Clergy/ritual committee/SPL members could start from the syllabus for Elisheva’s 3-year basic course and expand as warranted.	One month.
Step 2. Designate a Coordinator for Jewish Learning (CJL) to implement the new learning program. <i>Full-time, this person would find or create content and customize programs for groups or individuals; option 2: create self-perpetuating mechanism for people to help themselves create a program, need forward momentum to keep people engaged and attract people both those who are here and those outside.</i>	Board + clergy Has there been discussion of a program director — admin of this type of program? Lifelong learning committee?	Two months
Step 3. Design and implement an annual learning calendar based on the JLAs for 2018-2019.	CJL + clergy	Three months
Step 4. Create an annual color-coded form (corresponding to each of the JLAs) so that participants can track their progress (either printed or online). Issue certificates of accomplishment or some other type of recognition at the end of the year.	CJL + administrative staff	Ongoing
Action #2. Design and customize Jewish learning plans, or “spiritual fitness programs” (SFPs), to appeal to relevant demographics (e.g., post bar/bat mitzvah and young professionals) and to individuals.	CJL	Ongoing

Action #3. Augment learning resources through reciprocity with other Jewish learning programs (e.g., other synagogues, JCCs, online resources, etc.).	CJL	Ongoing, measure use, progress, feedback
Action #4. Explore implementation of community-learning ideas, such as seasonal topics, community reads, experiential learning, and areas beyond the Ashkenazi tradition.	CJL	Ongoing
Action #5. Consider creating online content (e.g., short videos) that could also be used to generate revenue.	CJL + clergy + lay leaders	Ongoing
Action #6. Schedule brief lectures at convenient times (i.e., evenings and weekends), including when people are in the building (e.g., school dropoff and pickup), and senior programs during daytime. Things that already take place can be augmented or fit into this larger learning program.	CJL	Ongoing
Action #7. Explore chavurot and mentorship relationships to foster learning, including scheduling Shabbat dinners or lunches at private homes.	CJL + interested members can be joined with Shabbat at congregant homes in chavurah style groups.	Ongoing
Action #8. Organize a congregational retreat or Shabbaton with specific/seasonal themes that line up with the JLAs.	CJL + interested members, event co-chairs	Twice a year

FRIDAY NIGHT SERVICES

Strategic Objective #2: We want to ensure that as many congregants as possible can participate in AAC Friday Night services. We aim to make sure our service is held at a convenient time or location and that members feel comfortable, included, engaged, and inspired.

Action What?	Capacity Who? How much? How complex?	Timeframe When?
<p>Action #1: Messaging and Communication. To ensure congregants are aware of the content, intimacy, and relationship building activities the Friday night service provides.</p> <ul style="list-style-type: none"> - More marketing/publicity to create greater awareness and make Friday night service more enticing, publicize that it is a short, intimate, vibrant experience; Include this in all Synagogue communications online and offline. - create short melody or Friday night montage — this summer Rabbi and Hazzan are creating 3-4 minute how to's (light candles, etc.) for website - niggun of the week to send out with weekly email - livestream services? 	<p>Communications Director and Clergy along with other interested parties would need to work on this together.</p> <p>This should be no cost to the congregation – just creative thinking and rewording is required.</p> <p>Need to measure attendance over time to see if marketing is effective.</p>	<p>This can happen as soon as possible. We can try this for a year and then revisit – see if this makes a difference in attendance.</p>
<p>Action #2: Hearing Aid Loop in the Chapel Install a hearing loop in the chapel in order for all members with hearing aid devices to be able to hear events in the chapel, including the Friday Night service.</p>	<p>Executive Director would work with Facilities & Grounds committee to research cost and process for installment.</p>	<p>As soon as the research has been completed and we have the funds, this should happen soon thereafter.</p>

<p>Action #3: Nosh Before Service (in addition to Oneg) – To promote relationship-building and encourage attendance of those who may not be able to eat before services, offer appropriate snacks for 30 minutes before the start of the Friday night service. This might be a time to offer guided discussion, introduce new melodies, connect with young families who have just completed their Shababy Service, or schmooze with guest speakers, etc.</p> <p>David: I am not a regular Friday night attendee, but when I do attend I don't see people coming earlier than the start. In fact, the attendance builds over time, leading me to believe that people have a hard time making it at 6:30 pm. I'm NOT suggesting we change the start time of the service, just questioning whether this is needed. And if the suggestion is to do this at 6:30 pm for 15 minutes, then we have pushed the end time of the service later. I don't know if that would go over too well.</p> <p>Focus on specific groups on certain weeks, such as drinks before davenen for singles, songs for seniors, etc.</p> <p>Shabbat dinner and kids' groups leading services too—build those cohorts.</p> <p>Have Shabbat dinner after services, not tailored to families. Have a kid drop off. BYOB, quarterly and assess. Bring a buddy.</p>	<p>Kitchen Services, Executive Director, and Custodial Staff would need to determine what food is appropriate, the quantity of food and the cost. Perhaps we can ask members to sponsor this (in addition to oneg).</p> <p>Shabbat dinner catered by offsite caterers has been successful.</p>	<p>Once this has been approved and funds have been secured, we can implement this. We should reevaluate after a year or so to determine if this is something that we should continue.</p>
--	--	---

<p>Action #4: Friday Night Neighborhood Gatherings – To encourage members to gather in small neighborhood groups on Friday night to celebrate Shabbat. This might include prayer services (instead of coming to the synagogue), dinner (following services at the synagogue), or a combination of the two. Help organize people by zip code or neighborhood.</p> <p>DIY Shabbat, videos, booklet</p> <p>This works well with youth groups—led by kids in their own environment.</p> <p>Invite college students from the area.</p> <p>“Just add wine”</p>	<p>Volunteers from the congregation would organize these gatherings with synagogue support. Synagogue staff could help train leaders, adapt the siddur for home use, or help identify the various neighborhood groupings. A companion course could be a part of this process to educate people on how to lead the service or run a traditional dinner, etc. If the synagogue subsidizes, this would have a cost, but otherwise, this may have no cost.</p>	<p>Timeframe: If a course takes 2 classes, then this could be implemented within a few weeks. Organizing may take more time, but that is dependent on how much time volunteers can devote to the project.</p>
---	--	---

SHABBAT MORNING EXPERIENCE

Strategic Objective #3: To build a sacred community of covenantal relationships, elevate and nourish mind and soul while elevating community by: (1) offering multiple modalities to connect spiritually; (2) engaging members in the Shabbat Morning Experience whether in the main service (traditional) or outside the main space (newer practices); and (3) creating depth, meaning and greater connection to traditional prayers while finding fresh approaches to prayers.

Action	Capacity	Timeframe
What?	Who? How much? How complex?	When?
<p>Action #1: Conduct alternative minyanim outside the main service during traditional service timeframe (in the window of 9:30-noon), such as learners minyan, kavanah minyan.</p> <p>Learning about music or movements in the service can be part of Learners Minyan or part of regular service.</p> <p>Offer an alternative minyan on HHD as well.</p>	<p>Clergy, ritual committee, minyan leaders</p>	<p>Several times per year. Evaluate attendance and desire to continue annually.</p>

<p>Action #2: Offer learning opportunities after kiddush (be aware of timing with Mincha), including Windows on Israel discussions; guest speakers</p> <p>Hold events in conjunction with se'udah shelishit or havdalah</p> <p>can be part of the service, in place of the d'var Torah, maybe add 5 minutes to service.</p> <p>Add other discussions, such as Halacha on ____, Ask the Rabbi, AAC policy on X/Conservative Halacha on X, Ritual practice, How To's (e.g., wrap a Torah, have an aliyah, etc.) We can have a suggestion box online or in the office for topics of discussion</p>	<p>Shlichah, guest speaker invited by clergy, professional staff or committee chair, Ritual Committee, Gabbai</p>	<p>Several times per year. Evaluate attendance and desire to continue weekly, monthly, or what time frame?</p>
<p>Action #3: Help pray-ers to connect with prayers and Gd., giving an introduction, prayer intention, moment of meditation before recitation during the Shabbat morning service — as part of and in flow of service, something that enhances and deepens the flow. Organic teaching within service</p>	<p>Clergy note: David Blumenstein offers to discuss with the clergy to generate ideas.</p>	<p>ongoing</p>
<p>Action #4: Deliver D'var Tefillah instead of d'var Torah</p>	<p>Clergy</p>	<p>can be varying durations: a single Shabbat, a series for a month or other defined period. Evaluate feedback after several months.</p>
<p>Action #5. Announce congregational lifecycle events</p>	<p>Clergy</p>	<p>ongoing (Rabbi has already started doing this)</p>
<p>Action #6. Evaluate delivery of Torah reading introduction. Leave out, print in Shabbat announcement sheet, continue as is. Discuss with Rabbi Rein timing of delivery or have it on paper. Can video introductory Parsha video to have online or email "the three questions to discuss this week"; use website and email.</p>	<p>clergy, ritual committee can participate in evaluation</p>	<p>ongoing Within a month or two discuss with Rabbi; test for a few months, and then evaluate feedback</p>

<p>Action #7. Rabbi and Hazzan plan and teach something together, such as a new tune, about a ritual, about tradition. Then, Post teachings online and create online resource library, overlaps with Action #3.</p>	<p>Rabbi and Hazzan; Technology savvy volunteer</p>	<p>periodic, evaluate feedback after 2-3 such teachings.</p>
<p>Action #8. Teach about Jewish calendar events: for example the history or meaning behind a fast day, give a quick reminder of upcoming observances</p> <p>have calendar, looking like calendar, as a handout</p> <p>-Reimagine “board member minute”: “this is something I learned this week,” “someone I met this week”; welcome, thank you to service participants</p>	<p>Rabbi, Hazzan, knowledgeable congregant, ritual committee members</p>	<p>periodic</p>
<p>Action #9. Add more depth to Yizkor by using extra readings, meditation, booklet; supplement what the siddur offers. - Rabbi is doing</p> <p>distribute book of names each yizkor, not just on YK</p>	<p>Rabbi</p>	<p>for Yizkor service. (Rabbi already has started to include additional readings from the siddur)</p>
<p>Action #10. Publicize possibility of baby naming ceremony using special chair on Shabbat or other time.</p>	<p>Communications, Clergy</p>	<p>ongoing (Rabbi already offers Shabbat morning baby naming ceremony — many opt to have home or private ceremony)</p>

YOUTH ENGAGEMENT

Strategic Objective #4: Foster Jewish Identity of our post Bar Mitzvah cohort, help to build our teen community through Jewish ritual, education, relationships, and leadership, grades 8-12.

What?	Capacity Who? How much? How complex?	Timeframe When?
<p>Action #1. Developing Shabbat recognition / “reunion” for specific grades. It would involve more than just the kids committed to ATID - as it’s a specific event rather than committing every Sunday. It would allow our kids to see peers they haven’t seen since the High Holidays, the B’nai mitzvah year, etc. Teens take ownership of designated Parsha or month, same one year to year, as possible.</p> <p>(Homecoming Shabbat for college age kids)</p>	<p>One Shabbat dedicated to the members of grades 8-12 each year. Ideally, each cohort can have its own dedicated Shabbat, so that teens can learn parshiyot and Haftaret, with the potential to recite for multiple years. Parents/families can be involved by encouraging participation of members of the class, financially supporting kiddushim, and perhaps helping to organize reunion activities outside of services as well.</p>	<p>Can be planned for the coming school year depending on Shabbat availability (bnei mitzvah, speakers, etc.). We are looking for 4-5 shabbatot. (Graduation Shabbat is already in place?)</p>
<p>Action #2. Twice annual retreat for teens. (grades 8-12) at a location (such as Pearlstone) away from the shul. Involve late night educational and ritual opportunities, peer led leadership opportunities. Would allow for a more casual Shabbat environment than what usually transpires in the synagogue.</p> <p>One could happen with congregational Shabbaton with teen track; could happen with teens from other congregations.</p>	<p>Retreats can be open to all teens in grades 8-12. Retreat can have a particular theme decided upon by teens/ leaders of ATID/ USY. Can involve invited guest leaders/ teachers, Jewish singing, skits, as well as social events, ritual, and other Jewish-related activities (environmental justice, social justice, Jewish learning, etc.). Cater food from kosher establishment. Teens/family would cover majority of cost.</p>	<p>May be too late to schedule for the first part of the year, but finding / reserving a location for Spring should be doable in the summer or fall. From there we could assess if this could be a 1x/year or 2x/year activity.</p>

<p>Action #3. An Israel Trip can be a “capstone event” at the culmination of the ATID program for AAC teens. Consider sponsoring a trip every two years, so that Agudas teens who have participated in ATID from 8th grade can receive subsidy to attend a congregational trip specifically for teens at the end of either their 11th or 12th grade year. Perhaps a June trip, immediately following HS graduation. Alternatively, during winter break. Likely a 10-14 day experience. With congregational leadership.</p>	<p>Very strongly subsidized. Men’s Club Israel Pilgrimage Fund as a source. Men’s Club is interested in supporting these types of programs.</p> <p>AAC teen trip could join with other synagogue or youth group trips to gain economy of scale.</p> <p>More subsidy for longer enrollment in teen program.</p>	<p>Likely would need to be announced as a commitment in 2018-19 so parents and students are aware of requirements -- with an inaugural trip in the winter of 2019 or Spring of 2020. Would require input from ATID parents and students as well as professionals.</p>
<p>Action #4. 10th grade-12th grade seminar/mini course Chanukah “dedication” course, not at end of school year</p>	<p>Clergy should lead the class in order to maintain that relationship with the teens.</p>	

Strategic Objective #5: Develop and enhance meaningful social action opportunities for teens as a means to both learn and practice the Jewish concept of Gemilut Hasadim and Tikun Olam.

<i>What?</i>	<i>Capacity Who? How much? How complex?</i>	<i>Timeframe When?</i>
<p>Action #1. Expand and focus on teen involvement in multiple activities for Good Deeds Day as well as other synagogue social action activities. Give teens leadership, that day or broader.</p> <p>Kid trips to do social action, eg. to Houston, Inner City DC—lunch, cleanup, reading, etc.</p>	<p>Encourage teens to work together to develop, plan, and organize a variety of social action activities on Good Deeds Day each spring.</p>	<p>This can be implemented along with existing social action initiatives on the calendar -- as well as discussing with the teens in the fall to determine other potential activities.</p>

<p>Action #2. Involve teens in the existing social action committee through the synagogue, developing roles for leadership through a teen component of existing initiatives.</p> <p>Teens should have interaction with existing committees of shul.</p>	<p>This can begin small and grow. Have a group of teens work with Agudas' Social Justice committee, to develop social justice activities and outreach that speaks to teens. This should involve teens sponsoring an event focused on issues that are meaningful to them, such as racial justice, homelessness, poverty; and include the Jewish values that speak to these issues.</p>	<p>Beginning in Fall 2018 - connecting social action committee leadership with teens to promote involvement.</p>
--	---	--

NOTE: Have "Name tags" for congregants for Friday night and Saturday services. Jane Pollner and David Blumentstein have a button making machine and would be happy to lend it to the shul. They offer to cover the cost of the materials as well. Somebody would have to design the button and a group would have to make them. We would also need a system to display them somehow and an ongoing mechanism to replace lost buttons.

We should also have "Guest" or "Visitor" buttons for use at a dinner or services. Also, for a dinner, with advance reservations we can make buttons for new people.

Internal Communications and Membership Engagement

TASK FORCE REPORT: INTERNAL COMMUNICATIONS & MEMBERSHIP ENGAGEMENT

Task Force Membership:

Co-chairs: Ilana Rothberg, Ann Bennett

Members: Janet Barnett, Ellen Bayer, Renee Berman, Mindi Maline, Dan Munz, Marilee Perkal, Rabbi Steven Rein, Jane Shichman

INTERNAL COMMUNICATIONS

The Situation:

Communications was listed by congregants as one of the three most important areas that needs to be addressed. Eight in ten (83%) generally know what is happening at the shul, but only a third (34%) strongly agree there is a sense of community. While internal and external communications overlap, this report only deals with how the office communicates with the membership and communications between members.

How to meet the need of congregants is complicated by the rapid change in platforms for communications, particularly social media. According to the data, there is a variety of opinion on how information should be shared; that opinion is impacted by demographics and the range comfort or familiarity with the ever-changing network of electronic communications.

It is felt that the new and improved website is underutilized and its purpose should be better articulated. The upcoming addition of the JVillage/members-only component of the website is an opportunity to enhance the member's connection with the office and potentially with each other. Changes in communications must be clearly articulated and expectations made clear. This is particularly important in light of the high amount of feedback that has focused on obtaining information and ensuring transparency.

There is one very part-time (10 hours/week) employee dedicated to communications. The limitations of time impact the operations and the ability to plan ahead and provide a "well-oiled machine.". The lack of resources in this arena requires us to re-imagine the role of clergy and all staff in the communications operations. Implementing a strategic communications plan will ensure that the branding, messaging and communications meet planned goals.

The data reveal that there is room for improvement in how information is shared, the timing of notice and the effectiveness of the communications. Basic operations such as managing the calendar and publicizing internal events should happen seamlessly.

The nine facilitated "community conversations" that held through the strategic planning process were well-received. While they were mostly attended by more engaged members, they provided an excellent forum for members to communicate ideas and concerns back to the committee. It was suggested numerous times that these parlor meetings be offered periodically.

Vision of Internal Communications:

At the most basic level, we want all congregants to have access to all the information being transmitted. Providing proper notice, communicating engaging, meaningful and thematic content and employing an overall strategy will ensure a clear understanding of what, why and when we are messaging. Effective Internal Communications should be a tool to bring people together, thereby meeting the oft-repeated goal of helping to build people-to-people connections and relationships. Measure/Ensure communication translates into action (i.e. Tell us how you found out about this event)

OVERALL GOALS:

- Increase readership of messages (emails and especially the monthly bulletin)
- Engage/Re-engage members
- Implement platforms that allow us to better understand our congregants
- Communicate to specific interest groups within the community
- Implement Social Media Strategy (see addendum)
- Increase Website Traffic
- Develop Strategic Communications Plan (for pushed messages, see addendum)
- Highlighting Members through Communications

SUCCESS CRITERIA:

Communication Characteristics:

- Personal touch/Caring messaging
- Build trust
- Connectivity
- Timeliness
- Promote ongoing engagement
- Let's members live more of their life through AAC (socially, social action)
- Using analytics to determine effectiveness of communications: (Track website traffic, % of opened/read messages, etc.)

Strategic Objective #1: Develop a Strategic Communications Plan

While there is plenty of tactics that need to be employed daily to ensure the membership is adequately informed, a broader mechanism should be written and implemented in order to support the new Strategic Plan for the congregation. A communications strategy will help us communicate effectively and meet core objectives under the Strategic Plan. We will need to include public relations**, web strategies, a marketing plan and purpose and role for each communication platform (and whether each is truly meeting our objectives). A successful plan will specifically highlight members through communications.

<i>Action</i>	<i>Capacity</i>	<i>Timeframe</i>
<i>What?</i>	<i>Who? How much? How complex?</i>	<i>When?</i>

<p>1). Define each communication channel and its goal/objective/target audience/owner/cadence/best practices. (Publish as resource guide with info, distribute to new members.)</p> <p>2). Leverage the different channels to educate on Jewish traditions – will help people connect to Jewish faith/tradition across a wide range of experience levels or levels of observance</p> <p>3). Identify contacts and processes for sending out messages (good resource for members who plan events); ensure the calendar is always updated; and, re-evaluate the current approach of not publicizing events well in advance.</p> <p>4). Determine enhancement ideas (for umbrella strategy and for individual communication channels)</p> <p>5) Need “Feedback” box and someone responsible for monitoring/responding to it. This could dovetail with “community conversations” -- use those as a forum to discuss feedback you’ve received.</p> <p>6). Ensure that a successful plan meets the following goals that specifically highlights members through communications. This may include:</p> <ul style="list-style-type: none"> - New Member Corner: Bio/Blurb, Welcome to the "Name" Family! - Include Celebrations: birthdays, anniversaries, bar mitzvahs, baby namings - Happenings: Share good news about members, Honor members of X years 	<p>Development by Membership Team, Executive Director, Office Staff and Clergy</p> <p>An effective Plan will ensure clear accountability for all communication and brand messaging.</p> <ul style="list-style-type: none"> o Weekly Email o Monthly Bulletin –(See Strategic Objective #4) o Shabbat Announcement – does not need to be verbally read from the bimah; just verbally share important announcements, add back the parsha summary (learning aspect) o High Holiday Mailing – transition to online format o High Holiday Booklet o Event Flyers o AAC Website o AAC Facebook Page o AAC Subgroup Facebook Pages: Sisterhood, Young Families, Preschool Families, etc. (what other subgroups have FB pages?) 	<p>This plan should be developed over the summer and the congregation should begin to see changes before (and in anticipation of) the high holidays.</p>
--	--	--

Strategic Objective #2: Implement Effective Social Media Strategy

We sense that our synagogue has been slow to embrace social media as a “way of doing business.” We need to understand how our congregants communicate, be mindful that there may be age-related differences in how we communicate and encourage the use of social media to provide information and member to member connections.

<i>Action</i>	<i>Capacity</i>	<i>Timeframe</i>
<i>What?</i>	<i>Who? How much? How complex?</i>	<i>When?</i>
1. Define what we want our social channels to be: marketing/branding or community engagement <ul style="list-style-type: none"> - Decide which platforms to use (survey?) - Call out social media presence on website - Drive traffic to website from Social Media - Define type of content to put on Social Media platforms - Create channels/spaces for members to convene/connect - Use Resources from Aimee in Dropbox (Relational Social Media Judaism Assessment, Social Media Inventory Template) to meet objectives - Explore Slack.com (Dan) - Explore a closed group for members, or an open group for external outreach - Consider privacy issues with posting on Facebook - Educate/Encourage clergy and professional staff to be engaged with Social Media Strategy – to help get things done in a timely manner 	This is driven by the communications specialist and overseen by the ED. However, all staff should be trained, connected and able to utilize and social media effectively	Short and Medium Term: Training should be done in the short term. Implementation should be done within 6 months.

Strategic Objective #3: Utilize New Membership Management Software

The new **JVillage** software that is available with the new website is likely to become available to the congregation this summer 2018. A communications strategy for onboarding this change needs immediate attention. The ED is responsible for implementing and communicating about this new tool.

Action	Capacity	Timeframe
What?	Who? How much? How complex?	When?
<ul style="list-style-type: none"> - <i>JVillage</i> is launching in summer - Possible Functionality: Online Listserv Forum, Members Only Area, Online Event RSVPs, Targeted Messages... what else? - Get a better sense of how the email sign-up functionality integrates with the website - Migrate High Holiday Mailings/Packets - Outreach strategy: Leverage for membership engagement, review and reach out to un-engaged members - What demographic information do we need to capture from members? - Define how do we roll this out to the community - What's going to make it user friendly? - Demo/webinar - Community Listserv – connecting members informally, determine guidelines - Smart Communications – send messages to target audiences, coming soon 	<p>Executive Director is Lead</p> <p>This will impact all congregants who are online and some staff members;</p> <p>Need Plan b for those members who are not online</p>	<p>Very Short Term:</p> <p>Implementation begins this summer 2018; ergo the communications plan for the rollout of this new software needs to begin immediately and before the SP is completed</p>

Strategic Objective #4: Reimagine the Bulletin

Reimagine the Bulletin take a format closer to a journal, rather than duplicating content. Given that half the congregation receives it at least two weeks late, consider removing the time-sensitive components and capture those in the other communication vehicles. Review how often to publish, since a monthly might be unrealistic and an unnecessary burden on staff.

Action What?	Capacity Who? How much? How complex?	Timeframe When?
<p>Create three distinct sections that help meet other strategic objectives: Congregational Learning; Create a forum to engage members; and, Building Relationships between members</p> <p>About Judaism (Why?) - a section to teach about Judaism and observance. What are the rules, traditions and customs and why do we do them? This would meet the needs of those who have asked for more pragmatic teaching about observance and for those (increasing number of folks) who really didn't grow with all of the traditions.</p> <p>About Ideas (Create)- a creative forum for writing, publishing, book reviews, blogging for congregants and guest columns (maybe still clergy columns here if they are not time-sensitive?). This might meet the interests of a wider variety of members.</p> <p>About Us (Community) - a section to highlight members and maybe their accomplishments and b'nai mitzvah projects, good deeds, etc. This would introduce and provide more connection between members as they get to know a little bit about other members, who they may not have ever seen or heard of.</p>	<p>Communications Associate</p> <p>New Bulletin Editor?</p> <p>Put a table of contents on the cover email, use more as a learning tool/resource, highlight members, create thematic learning opportunities, how congregants can enhance their practice and why (i.e. why we sell <i>hametz</i>?), gather input from clergy/professional staff about ideas, a model that you select which topics you'd like to learn about and only get those</p>	<p>Long Term</p>

Strategic Objective #5: Change Management Communications Practices

Overall recommendation is to launch this plan with a strong focus on transparency, to emphasize that communications decisions aren't being made in a "black box" and to gain broad buy-in for eventual changes.

<i>Action</i>	<i>Capacity</i>	<i>Timeframe</i>
<i>What?</i>	<i>Who? How much? How complex?</i>	<i>When?</i>
<ol style="list-style-type: none"> 1. Create checklists of communication channels to leverage for implementing congregational changes. Classify based on impact: small, medium and large 2. Change management practices will need to be leveraged to communicate all changes from the Strategic Planning process -- and can be leveraged for future initiatives 3. Establish metrics goals and success criteria to determine effectiveness of new efforts 4. Investigate if USCJ offers Change Management consultations / best practices (Rabbi Rein) 5. Schedule community conversations to gather feedback on larger efforts when needed 6. Live Stream synagogue meetings (ie. Annual Meeting) 	<p>Development by Membership Team, Executive Director, Office Staff and Clergy</p> <p>It is recommended that metrics be established to evaluate the effectiveness of the changes.</p>	<p>Ongoing: Must always utilize these practices when implementing change</p>

****Internal/External Communications:**

Our **external communications** should include a template for large events that are open to the public. These events can serve as outreach opportunities to showcase the synagogue to the outside community. When we have a major event, the office should automatically be prepared to push out to the Washington Jewish Week, The Federation calendar, other local Jewish NV institutions, etc. An event committee can also help, but some of this should just happen automatically. Also, when appropriate, pictures should be pushed out after the event. Did we send them to the Jewish Week or place them on our facebook page after the event?

MEMBERSHIP ENGAGEMENT

The Situation:

As of February 2018, Agudas Achim has 490 families as members (a decrease of 50 from 10 years ago) with 820 adults and 363 children (Source: FactBook). As shown below, members continue to be spread across all age cohorts and AAC is an “older” congregation with a majority of long-time, committed members (Source: Survey).

Age of Adult Members		Tenure of Members	
Age 24-34	1%	5 Years or Less	12%
Age 35-45	17%	6-14 Years	18%
Age 46-55	14%	15-25 Years	31%
Age 56-66	19%	26+ Years	40%
Age 67-74	21%		
Age 75+	12%		

Congregants have good friends, feel safe and believe they can get involved at AAC. Also, continued connection to the synagogue is largely dependent on the connection with friends and family who are also members. However, currently, there is no formal process or programming in place to help new members begin making those connections as soon as they join. Once a year, we welcome new members at a New Member Reception prior to the Annual BBQ. But there is no follow-up after the barbecue to help new members meet others and feel at home in our community.

Lots of programming exists, but many programs operate in the silos based on ages of adults and children. Some members say they would like more multi-generational programming where the entire congregation participates, and others feel that more small group meet-ups are needed. Some congregants would like to have programs created specifically for young adults, adult singles, empty nesters, seniors, interfaith families and LGBTQ families.

Programming is an important component of member engagement, but it is only one part. To foster deep engagement, we need to create an environment and infrastructure to more effectively welcome new members and foster relationship-building among all members. Additionally, we need to leverage new and existing technology platforms to gather data on members' interests on an ongoing basis and design programming that more closely aligns with their interests and needs.

Vision of Membership Engagement: We strive to bring people together by creating a caring community where people want to stay connected through worship, cultural and social events. Furthermore, we want to expand our outreach to new and all existing members.

From Strategic Planning Vision (Draft): We are a community built on covenantal relationships. Each and every day we elevate and nourish our minds and souls while building a sacred community. We care about each other, we care about social justice, we care about Israel, and we care about YOU.

Strategic Planning Objectives for Membership Engagement:

- Ensure that all members and all ages are engaged in synagogue life
- Better inform members ways to get involved
- Create a road map of the first year of membership
- Consider ways to breakdown demographic silos
- Create new ways to engage current and new members
- Help congregants form and deepen relationships with each other
- Create programming (i.e. social action) to expand membership and membership engagement
- Ensure that all demographics are served, including teens
- Assess barriers to membership, retention and engagement
- Develop a *passive* mechanism to gauge congregant engagement/participation in synagogue life and activities

Strategic Objective #1: Welcome new members through streamlined activities and interactions during their 1st year of membership.

Action	Capacity	Timeframe
What?	Who? How much? How complex?	When?
<p>Create a 1st year of membership “road map” w/ onboarding activities and timelines.</p> <ul style="list-style-type: none"> • Develop a New Member Packet (See Adas Israel’s brochure) • Meet & Greet with Clergy** • Tour of Building • Orientation of Groups/Programs • Welcoming Committee at Services • Coffee Dates: Get to know new members • Mentor/Buddy Program • One-Year Check-In with New Member 	<p>Development by Membership Team, Executive Director, Office Staff and Clergy</p> <p>Membership is an ongoing priority all year.</p>	<p>Short Term: Implementation around High Holidays</p> <p>Ongoing Program: Never stops!</p>

Strategic Objective #2: Establish a Membership Engagement Team to help members feel connected to the synagogue community, especially at key times.

<i>Action</i>	<i>Capacity</i>	<i>Timeframe</i>
<i>What?</i>	<i>Who? How much? How complex?</i>	<i>When?</i>

<p>The Membership Engagement Team will:</p> <ul style="list-style-type: none"> • Reach out to welcome new members -- and take ownership of completing onboarding activities • Ensure the office staff is warm and welcoming to all new, existing and prospective members • Reach out to members who are attrition risks • Reach out to members at key times; including life events, birthdays/anniversaries, membership milestone anniversaries, partner with Clergy for outreach • Stay connected to members w/ 1:1 or small group conversations: <ul style="list-style-type: none"> • to determine what will draw them to programs using survey or in person conversations • to ensure members are aware of ways to get involved (subgroups, volunteerism) • Increase opportunities for members to meet through small, local meet-up events • Partner with the Religious Committee to offer honors (for holidays, Shabbat, etc.) based on years of membership 	<ul style="list-style-type: none"> • Membership Services VPs lead the Membership Engagement Team, partnering with Clergy, Executive Director, Office Staff for implementation • Decide # of people needed and team/individual responsibilities • Recruit volunteers for team (weekly emails, personal emails, in-person conversations) • Conduct a kick-off meeting: decide division of work, interaction model, etc • Explore using Slack as a technology platform for members to connect • Develop communications to roll-out this new local meet-up strategy • Leverage Facebook and JVillage Listserv to advertise 	<p>Short term priority</p>
---	---	----------------------------

--	--	--

Strategic Objective #3: Engage in active hospitality efforts to create a warm and welcoming environment both in the synagogue and in spaces throughout our community.

Action	Capacity	Timeframe
What?	Who? How much? How complex?	When?
<ul style="list-style-type: none"> Enhance kiddush to promote outreach to new members and visitors, strengthen existing relationships, and help foster new connections. Invite new members to small gatherings (e.g., Shabbat dinners, Sunday brunches) in members' homes as part of onboarding process Create infrastructure for ongoing home hospitality across the membership, both in conjunction with and in addition to existing affinity groups (Religious School parents, Young Families, Social Action) Encourage volunteers to work in the kitchen in order to 1) reduce costs and 2) meet other congregants 	Member Engagement Team and individual members who volunteer to host small events in their homes	Short to Medium Term (following creation of member engagement team and in coordination with first-year member roadmap)

Strategic Objective #4: Maintain programming that's accessible to all members, while emphasizing programming designed to foster relationships among members.

Action	Capacity	Timeframe
What?	Who? How much? How complex?	When?

<ul style="list-style-type: none"> • Plan smaller local gatherings (not at Agudas) to provide opportunities for congregants to gather informally (leverage JVillage to promote) • Effectively reach out to specific targeted audiences for programming • Organize multi-generational events such as a retreat/shabbaton, music performances, social action • Engage various groups by planning themed shabbats and programs such as LGBTQ, Young Families, Sisterhood, etc. • Strengthen programs targeted to engaging teens and those interested in Youth Group. • Intentionality about the speaker to be engaging for the targeted audience. • Revisit Sisterhood and Men's Club events to connect it with general programming. 	<ul style="list-style-type: none"> • Clergy, Board, volunteers and event facilitators -- and future Director of Programming and Engagement (see Strategic Objective #5) 	<p>Medium to Long term</p>
--	--	----------------------------

Strategic Objective #5: Hire a Director of Programming and Engagement to ensure membership engagement activities and programming remain a top priority.

Action	Capacity	Timeframe
What?	Who? How much? How complex?	When?
<ul style="list-style-type: none"> • Hire a consultant in the short term to assist with accomplishing strategic planning objectives • Hire a full-time staff member in the long term to ensure membership engagement activities and programming remain a top priority 	<ul style="list-style-type: none"> • A consultant or part-time/full-time employee • Requires resources to pay for consultant or staff member 	Medium to Long term

APPENDIX:

****New Member Note:**

An email from a new member after meeting with Rabbi Rein:

“Hi Rabbi Rein,

It was very nice to meet you and chat. I've lived in many places and been a member of numerous synagogues; you are the first who has reached out individually, both a phone call and a one-on-one meeting. I really appreciate that.

I'll see you again at upcoming events and services.”

External Communications Task Force Report

Task Force Membership

- Chair: Jim Robbins and Marya Runkle
- Members: Andrew Cohen, Alex Perry, Arnie Rosenblatt

The Situation

In the congregational survey, communication was isolated as one of the key areas in which the shul could see improvement. Our task force looked at external communications, which comprises not only marketing and outreach but also other forms of public communications such as social media, branding and the web site.

Changing communications technologies will play a central role in Agudas' outreach efforts. There are a variety of communication media and technologies that could potentially be utilized to reach specific audiences and/or address specific needs. Social media platforms such as Facebook, Instagram, Twitter, etc., can effectively connect with broad audiences, provide rapid dissemination of information, build networks, and promote multifaceted dialogue. Video platforms such as YouTube and live streaming services allow distributed content delivery, promote/disseminate live events, and can be archived for later viewing. Group "hangouts," video chats and similar capabilities can connect people remotely in real time. These approaches provide benefits and impose requirements which require prior planning and support structures to maximize their effectiveness. They should be carefully considered as part of a larger strategic communication plan, noting also their potential infrastructure requirements, both in terms of technical requirements and staffing/expertise.

In addition to the technology infrastructure, it is as important to think about the content that the shul wants to promote, who our potential audiences are, and the objectives we want to achieve. We don't want to be in a position where we can reach an enormous number of people but have nothing to say.

Specifically, the task force examined:

- **External communication** – how we communicate with those outside the congregation, particularly those who may be interested in joining the community. There is a strong overlap here with the work of the Engagement task force.
- **Use of Technology** – how does the shul use (or not) the array of available communications tools? Are we effectively using low-cost/high potential impact web-based technologies and services? What else can we do to maximize the use of technology to achieve our vision?
- **Improving dialogue** – How do we shift the paradigm from one in which 'communication' generally refers to leadership/staff transmitting information to the congregation, to more of a multifaceted conversation within the community and outside of it? What opportunities can we create or what media can we use to support such a conversation over time?

- **Specific audiences** – What audiences are we trying to reach, whether members, people affiliated with the shul (like preschool families who may not be members), and the wider Jewish community? How do their communication needs differ? What systems or approaches can we use to support them with better communication?
- **Missing audiences** – what audiences are we failing to reach and why? Youth? Older members? Members of the larger local Jewish community area that are not formally affiliated? Other communities/shuls outside our general area? What new or different strategies can we use to communicate with them?
- **Marketing** -- To what extent are we marketing the shul to nonmembers? Does the shul have a recruiting strategy, and how can we integrate communications into it? What are other aspects of marketing the shul and its programs that go beyond seeking new members?
- **Education** – Are there methods or media (e.g. YouTube video) that can effectively communicate via new technology and support education and engagement? How do we view the role of the shul as an education resource for members/local non-members/the wider world?
- **Other** -- Any other external communication related topic or issue that they are compelled to explore.

Data from the Congregational Survey

In general, communications ranked lower on the satisfaction scale than other survey items in the Strategic Planning Congregational Survey

- 52% somewhat or completely disagreed with the statement that the congregation uses “a wide variety of communications strategies to tell a compelling story about how the congregation helps build meaningful Jewish lives.”
- 61% somewhat or completely disagreed that the congregation “has a visible and effective social media presence.”
- 65% somewhat or completely disagreed with the statement that “prospective members are easily able to navigate our website and find out about what makes our congregation unique and exciting.”

Demographics:

Membership and new member numbers for the past 10 years:

Year	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Members	509	510	500	517	512	514	510	513	491	492
New Members	13	8	7	19	12	10	14	26	18	17

These numbers indicate basically flat membership in an expanding community, which represents an opportunity for membership growth.

Vision of External Communications:

Agudas Achim is the hub of a multi-faceted Jewish experience, which encompasses many forms of engagement: prayer, holiday observances, study, education, and social action. Our public face should reflect and communicate the meaningful experiences the shul offers to its members, and support and expand involvement by members, and the community at large. We seek both to expand the active membership of the shul and to increase Agudas' reach and impact in the broader community.

Target Audiences

Primary: Prospective Members

- Young professionals / Couples without Children
- Preschool Families
- Gesher Families
- Unaffiliated Jews
- Military Families
- Young Families
- Apartment Dwellers
- Newly Relocated
- Seniors

Secondary: Building Awareness/Networks

- Community Partners
- Peer Synagogues
- News Media (secular and Jewish)
- Local Governments, Associations, and Community Groups
- Influential public figures

Strategic Objective #1: Use external communications to help increase membership

<i>Action</i>	<i>Capacity</i>	<i>Timeframe</i>
<i>What?</i>	<i>Who? How much? How complex?</i>	<i>When?</i>
Make better use of social media Post more photos/graphics/videos Build Facebook and Instagram pages	In general this is the most important means of public communications and outreach.	Medium term: formulate necessary policies and guidelines for increasing use of

Make more use of Twitter	<p>Requires opening up access to social media posting/participation by interested members</p> <p>Google adwords grant (free for nonprofits)</p> <p>Could involve a social media internship from a local school</p>	social media by more members
--------------------------	--	------------------------------

Action What?	Capacity Who? How much? How complex?	Timeframe When?
Formulate a privacy policy that allows clarity of photo releases to enable easier sharing of pictures, video and other content in which members appear	Effective social media promotion requires a ready supply of compelling photography of members and their activities. Existing policies make it extremely difficult to craft engaging posts. While several such policies have been drafted, none have been adopted. Thus, this requires making a choice.	ASAP

Action What?	Capacity Who? How much? How complex?	Timeframe When?
Increase diligence in reaching out to/welcoming potential new members and following up on prospects	<p>Have a more engaged welcome series. . Include a process of "onboarding" new members with a full year of events, matching them with a current member family, extend shabbat dinner invitations, etc.</p> <p>Have a mechanism for capturing information for following up (difficult to do on Shabbat).</p>	ASAP

Action What?	Capacity Who? How much? How complex?	Timeframe When?
-------------------------------	---	----------------------------------

Develop specific promotional packages designed to appeal to targeted prospective members and promote them in relevant channels.	Tactics might include offering (time-limited) reduced membership rates to targeted prospective members, providing free or reduced high holiday “coupons” to members who bring in new prospects,” hosting recruitment events outside the building, or designing other incentives that attract people to events Realize that although there are “acquisition costs” in the form of short-term reduction in dues, the revenue can be offset over time through increased total membership.	ASAP
---	--	------

Strategic Objective #2 : Increase community awareness of the AAC “brand” (our history, reputation and activities)

Action What?	Capacity Who? How much? How complex?	Timeframe When?
<p>Tell and preserve the unique and interesting story/history of our synagogue and community</p> <p>Encourage long-time members to share their family stories</p> <p>Collect/preserve/digitize historical documents and artifacts</p> <p>Post historical information/stories on social media</p>	<p>This involves encouragement from the organization to members to share their stories, photos and artifacts, perhaps with periodic notes in the bulletin</p>	<p>This would be an ongoing process.</p>

Action What?	Capacity Who? How much? How complex?	Timeframe When?
-------------------------------	---	----------------------------------

Increase our reputation/position in the community as an egalitarian, vibrant and diverse organization with diverse/varied programming and experiences	This can be accomplished through active use of the social networking tools noted above, and through connections to local media, noted below.	ASAP
---	--	------

Action What?	Capacity Who? How much? How complex?	Timeframe When?
<p>Increase our national profile/visibility</p> <p>Develop relationships with local and Jewish media</p> <p>Give reporters good stories that highlight positive aspects of AAC</p>	<p>Involves having people in the organization dedicated to press outreach, and encouraging members who have media or communications skills to do likewise</p>	<p>This would be an ongoing process</p>

Action What?	Capacity Who? How much? How complex?	Timeframe When?
<p>AAC's existing branding is tired and unclear in terms of visual expression (logo, typography, colors, etc.) as well as consistent messaging (tagline, key messages, tone, etc.)</p>	<p>Assign a committee of communication experts to examine current branding standards and recommend a feasible course of action.</p> <p>Note also costs involved.</p>	<p>Approximately 6 months to review</p>

Action What?	Capacity Who? How much? How complex?	Timeframe When?
<p>Use social media to share/promote interesting things with/from other organizations</p>	<p>This can be accomplished through active use of the social networking tools noted above.</p>	<p>ASAP</p>

Strategic Objective #3: Diversify participation from the broader community, including non-members and non-Jews

Action What?	Capacity Who? How much? How complex?	Timeframe When?
Bring people into the building who are otherwise uninvolved Communicate more events to the public at large	Develop/maintain/use an external email list of content that is of interest to non-members. Use email, distribution lists, social media and local media for promoting public events	This would be an ongoing process that could begin right away

Action What?	Capacity Who? How much? How complex?	Timeframe When?
Demonstrate that we are an important part of the texture of the NOVA/Alexandria community	This requires communicating Agudas community involvement through social media and local media channels	ASAP

Action What?	Capacity Who? How much? How complex?	Timeframe When?
Share our unique content, e.g., Elisheva's music, the Moline Lectures, Rabbi Rein's sermons	Review events on an ad hoc basis to see if they are to be made public events Use public communications channels to promote them if so	ASAP

Action What?	Capacity Who? How much? How complex?	Timeframe When?

Reach out to preschool and other young families who are not members	<p>Develop recruitment or outreach policies for non-member preschool families</p> <p>Don't charge for young family HH programs</p> <p>High Holiday tent – a great option for those with very young children</p>	ASAP
---	---	------

Strategic Objective #4: Raise awareness of our programs that support and embrace special or underrepresented populations (women, military, transient, vulnerable, etc.)

Action What?	Capacity Who? How much? How complex?	Timeframe When?
Engage in active outreach to members of the military and others who are temporarily in our community	<p>Rabbi (Major) Rein can play a large role</p> <p>Current and former military members can also help get the word out</p> <p>Sponsor no-cost HH attendance for uniformed military (as has been done in the past at AAC)</p>	This would be an ongoing process that could begin right away

Action What?	Capacity Who? How much? How complex?	Timeframe When?
Use social media as an outreach tool to attract interest/potential membership from specific groups	<p>Social media is ideal for locating people in the groups we want to reach, it would require simply searching and reaching out</p> <p>Reaching out to partner with relevant other special interest groups for particular events or topics</p>	ASAP