

VISION

- 1. Enhance religious participation, congregant spirituality and Jewish Communities.**
- 2. Achieve and maintain financial sustainability.**
- 3. Align programming to meet congregation's and community's needs.**
- 4. Re-create our operational resources and infrastructure to support our needs and aspirations**
- 5. Effectively connect with the broader community as well as with our members to enhance involvement in our synagogue community**
- 6. Develop a governance structure and leadership experience that stewards the organization**



**CONGREGATION
BETH SHALOM**

1. Area of Focus: Enhance religious participation, congregant spirituality and Jewish Communities.

Action Item #1: Formally define synagogue demographic groups (e.g. ways of observance, young couples, Religious School families, post B'nai Mitzvah families, empty nesters, snowbirds/seniors, etc).

Area of Responsibility: Ritual, Membership, Programming

Action Item #2: Evaluate and/or define religious/spiritual engagement strategy for each demographic.

Area of Responsibility: Ritual, School, Programming, Youth

Action Item #3: Determine need for additional religious/spiritual programs (e.g. Class 101 - Shiva, Lifecycle Events, Interfaith, Observance, Town Meeting - Ask the Clergy)

Area of Responsibility: Ritual, Programming

Action Item #4: Determine if there is demand for alternative religious engagement/spiritual activities (one-off classes - e.g. Shabbat dinners in congregant homes, yoga, overnight trips, nature walks, etc)

Area of Responsibility: Ritual, Programming

2. Area of Focus: Achieve and maintain financial sustainability.

Action Item #1: Create a fundraising strategic roadmap (to include all methods of raising funds, both annually and long term - to include legacy giving).

Area of Responsibility: Finance, Fundraising

Action Item #2: Create a greater culture of donor giving, asking and stewardship/recognition.

Area of Responsibility: Finance, Fundraising

Action Item #3: Ongoing review of dues structure, explore other models across the United States and determine if changes should be made.

Area of Responsibility: Finance, Membership

Action Item #4: Review and assess the existing budget process.

Area of Responsibility: Finance

3. Area of Focus: Align programming to meet congregation's and community's needs.

Action Item #1: Review and evaluate current programming.

Area of Responsibility: Programming, Ritual, Social Action

Action Item #2: Create and implement a programming planning protocol.

Area of Responsibility: Programming, Social Action

Action Item #3: Establish a program communications/outreach strategy (internal and external).

Area of Responsibility: Programming, Membership

4. Area of Focus: Re-create our operational resources and infrastructure to support our needs and aspirations.

Action Item #1: Bricks and Mortar - evaluate each of our building spaces to determine if they reflect our vision and create a plan to address each space as needed.

Area of Responsibility: Executive Vice President, House

Action Item #2: Bricks and Mortar - evaluate each system (e.g. HVAC, sound system, landscaping) and track each system to understand its lifespan and ongoing costs/fees for maintenance and replacement.

Area of Responsibility: House

Action Item #3: Operations - create a plan to improve the staff/board relationship that ensures the staff have a great place to work! (See Focus Area #6, Action Item #4)

Area of Responsibility: President, Executive Vice President

Action Item #4: Membership Communications - Create a system for congregation/community members to communicate their individual needs and what they are to staff (e.g. lifecycle moments, sick family members).

Area of Responsibility: Membership

Action Item #5: Clergy Communications - Establish a defined and consistent plan/system for clergy communications to membership and community members regarding lifecycle events and how we recognize them (e.g. death in the family, b'nai mitzvah, marriage, etc).

Area of Responsibility: Ritual

5. Area of Focus: Effectively connect with the broader community as well as with our members to enhance involvement in our synagogue community.

Action Item #1: Marketing/Communications Program - Provide staff the tools they need to develop a comprehensive communications and marketing plan to include the effective use of ShulCloud and all other communications tools.

Area of Responsibility: Membership

Action Item #2: Marketing/Communications Program - Provide staff the tools they need to assess all methods of communication (social, email, website) in order to streamline the methods and information being shared with the Congregation and where to locate this information.

Area of Responsibility: Membership

Action Item #3: Stewardship of Alumni members, potential members and current members - Establish a defined plan for stewardship of alumni members (college students, members that were married at congregation or by clergy, etc), current members, and potential members.

Area of Responsibility: Membership

6. Area of Focus: Develop a leadership structure that stewards the organization.

Action Item #1: Conduct an environmental scan (look at other congregation models) to determine appropriate size of Board.

Area of Responsibility: Executive VP, Strategic Planning Committee

Action Item #2: Review and revise organizational structure of the Board and ensure that the structure also aligns with current staff functions.

Area of Responsibility: Executive VP, BOT, Strategic Planning Committee

Action Item #3: Review Board and committee job descriptions, role, expectations and accountability.

Area of Responsibility: Executive VP, Immediate Past President, Strategic Planning Committee

Action Item #4: Operations - Review the authority of the E.D. to oversee staff, create accountability, establish evaluations and conduct onboarding in collaboration with VPs. change the bylaws to transfer certain authority from the Board VPs to the Executive Director to oversee the staff, create accountability, establish evaluations and conduct onboarding).

Area of Responsibility: Strategic Planning Committee

Action Item #5: Establish a formal nominating and recruitment process with a focus on the recruitment of new congregational Board members and succession planning.

Area of Responsibility: Executive VP, Strategic Planning Committee

Action Item #6: Establish a formal Board Development program to include but not limited to an onboarding and orientation program for new members and regularly scheduled retreats/trainings for all members.

Area of Responsibility: Executive VP, Strategic Planning Committee

Action Item #7: Review and then subsequently update bylaws based on all changes made through the strategic planning process.

Area of Responsibility: Secretary

Action Item #8: Determine the role of the Past Presidents on BOT

Area of Responsibility: Immediate Past President

Additional Support: Past Presidents