

# TEMPLE BETH OR STRATEGIC PLAN

## **Mission Statement:**

The Mission of the Temple guides all of the Strategic Planning work. The current Mission Statement is:

Temple Beth Or is a warm, compassionate, vibrant, spirited, inclusive, and participatory Reform Jewish Community. We are religiously and geographically diverse, serving the northern Puget Sound region of Washington State.

As God's covenantal partners in fulfilling mitzvot, our priorities are:

- K'hilah (community)/Mishpacha (family) - nurturing our interactive, multigenerational extended family;
- Torah - lifelong learning, searching for meaning, and seeking comfort and healing;
- Avodah - worship and celebration through the observance of meaningful, creative, and traditional rituals;
- Tikkun Olam - transforming ourselves and our world through tzedakah (fairness), social justice, and g'milut chasadim (acts of loving kindness)

## **Strategic Plan:**

The Strategic Plan is meant to be the big picture, guiding principles, tied to our Mission Statement, for what we want TBO to be. The Board's responsibility is to take the Strategic Plan and create an operational plan. The detail of the operational plan is driven by the data we collected through this process.

The key theme for the Strategic Plan is Quality.

1) Create a high quality membership experience: Membership and Community were identified throughout the SWOT, across all segments of the membership, and in all 4-assessment areas (strengths, weaknesses, opportunities and threats).

The focus areas are:

- Growth - we do not want unlimited growth - 250 families is the anecdotal maximum
- Recruitment and integration of new members
- Retention and Involvement/volunteerism (including Leadership development)
- Honoring of the Community and members

2) Create high quality programming to enhance the membership experience: Programming falls into the 4 areas of our Mission Statement:

- Kehilah/Mishpacha
- Torah
- Avodah
- Tikkun Olam

The focus areas are:

- Balance programming across the 4 areas
- Manage programming to be responsive to our changing environment

3) Create financial structure to support membership and programming: This includes facilities.

The focus areas are:

- Dues structure
- Program fee structure
- Capital assessment
- Develop long term financial plan

### **General Principles:**

Build on Strengths                      bridge gap to turn weaknesses into strengths

Capitalize on Opportunities      bridge gap to turn threats into opportunities

### **Recommendations:**

Based on these broad strategic directions we recommend organizing the existing committee structure under the 3 strategic planning areas, with oversight of each area by a member of the Executive Board.

- Membership - Secretary
- Membership Committee
- Mitzvah Corps
- Library
- Volunteer Management
- Bereavement
- Programming - Vice President
- Social Justice Committee
- Adult Education
- Youth Education
- Religious Practices
- Communications
- Events
- Finance and Facilities Planning - Treasurer
- Building & Security (includes Facilities Planning Task Force)
- Long term financial planning
- Fundraising
- Endowment

This structure will provide the Executive Board with a coordinated big picture view of the Temple needed to begin to operationalize the Strategic Plan. Operationalizing the Strategic Plan is a process of applying the principles of the plan to the various Temple activities and functions to create the Quality experience for our members. Some examples of next steps for a few of the high priority items as identified in our SWOT process are:

1. New Member Integration
  - a. Mentoring program
    - i. New member matched with same level member (i.e. family with small children)
      1. Youth Education
      2. Participation at services
    - ii. Oneg
      1. Pair new member with longer term member
  - b. New member handbook
2. Involvement/Volunteer/Leadership
  - a. Mentoring program
    - i. With Board and or committee members
3. Long Term Financial Plan
  - a. Evaluate dues structure
  - b. Facilities capital assessment/campaign
  - c. Investments
4. Programming: review for balance
  - a. Identify high performers
  - b. Reduce over-scheduling of activities
    - i. Manage master calendar for Temple activities
      1. Religious services
        - a. Friday night services
        - b. Shabbat services
        - c. Rosh Hashanah
        - d. Yom Kippur
        - e. Etc.
      2. Cultural community events
        - a. Chanukah party
        - b. Passover Seder
        - c. Purim carnival
        - d. Etc.
      3. Etc.

#### **Background Summary:**

This document is the result of the work done over the last year and a half by the Long Range Planning Committee and the Strategic Planning Committee. Input was gathered through individual interviews with temple members, SWOT assessments with the Board, core committees and general membership, and a retreat attended by stakeholders from all the main segments of temple membership (new members, long standing members, families with young children, families with older children, and adult members without children).

There were 4 critical areas identified through the work:

- Membership issues - recruitment/retention and growth issues
- Financial stability - fundraising/planned giving/capital campaign/dues
- Leadership structure - what type of structure and leadership do we need to meet our goals
- Programming

The summary of the SWOT process is below. The feedback we received is consistent with the results of the retreat in June of 2005 and the feedback we gathered throughout this process.

	<b>Board</b>	<b>Exec. Board</b>	<b>Rabbi</b>	<b>School Principal</b>
<b>Strengths</b>	<ul style="list-style-type: none"> <li>○ Community</li> <li>○ Connectedness to things outside temple</li> <li>○ Continue to recreate ourselves</li> </ul>	<ul style="list-style-type: none"> <li>○ Community</li> <li>○ Leadership</li> </ul>	<ul style="list-style-type: none"> <li>○ Community</li> <li>○ Connection to Region</li> </ul>	<ul style="list-style-type: none"> <li>○ Teachers</li> <li>○ Openness to change</li> <li>○ Fun</li> </ul>
<b>Weaknesses</b>	<ul style="list-style-type: none"> <li>○ Quality of education</li> <li>○ Participation</li> <li>○ Leadership</li> <li>○ Money</li> </ul>	<ul style="list-style-type: none"> <li>○ Leadership</li> <li>○ Participation</li> <li>○ Building</li> </ul>	<ul style="list-style-type: none"> <li>○ Avoid big issues</li> <li>○ Gaps in programming</li> </ul>	<ul style="list-style-type: none"> <li>○ Funding</li> <li>○ Curriculum</li> <li>○ Parent involvement</li> </ul>
<b>Opportunities</b>	<ul style="list-style-type: none"> <li>○ Camp Kalsman</li> <li>○ Property ownership</li> <li>○ Only Jewish Community option</li> </ul>	<ul style="list-style-type: none"> <li>○ Camp Kalsman</li> <li>○ Relationship with community</li> <li>○ Leadership development</li> </ul>	<ul style="list-style-type: none"> <li>○ Only Jewish community options</li> <li>○ People want to belong</li> </ul>	<ul style="list-style-type: none"> <li>○ Parent involvement</li> <li>○ Camp TBO</li> </ul>
<b>Threats</b>	<ul style="list-style-type: none"> <li>○ Loss of leadership</li> <li>○ Location</li> <li>○ Other Jewish community options</li> </ul>	<ul style="list-style-type: none"> <li>○ Loss of leadership</li> <li>○ Lack of participation</li> <li>○ Other Jewish Community options</li> </ul>	<ul style="list-style-type: none"> <li>○ Aging membership</li> <li>○ Other Jewish community options</li> <li>○ Don't address issues</li> </ul>	<ul style="list-style-type: none"> <li>○ Over programmed families</li> <li>○ Don't address issues</li> <li>○ Geography</li> </ul>

	<b>Youth Ed</b>	<b>Religious Practices</b>	<b>Social Justice</b>	<b>General Membership</b>
<b>Strengths</b>	<ul style="list-style-type: none"> <li>○ Community</li> <li>○ Quality of teachers</li> <li>○ Education highly valued</li> </ul>	<ul style="list-style-type: none"> <li>○ Balance of tradition and openness to change</li> <li>○ Inclusion of diversity</li> </ul>	<ul style="list-style-type: none"> <li>○ Community involvement</li> <li>○ Diversity of interest</li> <li>○ Communication</li> </ul>	<ul style="list-style-type: none"> <li>○ Community</li> <li>○ Volunteers</li> <li>○ Opportunities for involvement and education</li> </ul>

**Weaknesses**

- Parent involvement
- Facility
- Curriculum
- Money
- Draining the same volunteers
- Crisis management
- Volunteer burnout
- Funding
- Broader temple participation
- Geographically diverse
- Doing too much - spread ourselves too thin
- Integrating new members

**Opportunities**

- Camp Kalsman
- Interaction w/other religious schools
- Utilize and engage community
- Youth and Adult B'nai Mitzvah programs
- Build community through religious practice
- Bridge to larger community
- Build internal community
- Build quality Jewish programming
- Create strong community

**Threats**

- Over programmed youth
- Geographic diversity
- Location
- Lack of funding
- Finding balance between moving toward/away from traditional values
- Funding
- Isolated from membership
- Financial/funding
- Membership - recruitment/diversity/integrating
- Lack of participation beyond a core group

Governing Board Approval 11-2-2005 Membership Adoption 12/05 ?