



Strategic Planning Proposal for

Temple Beth El

Allentown, PA

July 2017

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Executive Summary

This report culminates a year-long process involving more than a hundred members of our congregation. Whether you participated in one of the nine Focus Groups, was a member of one of the four Task Forces, or were a member of the Strategic Planning Committee, this document would not have been possible without your cooperation and input. Rabbi Re'em and Cantor Wartell deserve special thanks for their willingness to allow the laymen to process this information. There have been a number of innovations instituted by the clergy already, but they were also integral to creating with us the strategic analysis so critical to this process. I want to issue a special thank-you to Gail Eisenberg and Linda Hamilton for the many hours they spent in helping me create this plan. I know the congregation is grateful for their participation. You will find the list of Focus Group Leaders and Recorders, The Strategic Planning Committee, the Ritual and Services Task Force, led by Jay Needle, the Membership Task Force, led by Kathy Zimmerman, the Finances and Sustainability Task Force, led by Seth Katzman, and the Leadership and Professional Resources Task Force, led by Lynn Rothman listed in the "Thank-you Addendum"

There were five common themes that emerged from the Task Forces' deliberations and recommendations:

- To grow, strengthen and engage our membership
- To enhance ongoing and develop new leadership models
- To find significant, sustainable and alternative resources of revenue
- To explore additional and alternative religious service practices
- To increase and improve our communications.

Each Task Forces' detailed recommendations (goals and strategies) can be found in their own Addendum. It is important to understand a number of definitions so all who read this report will understand the information in a similar fashion.

Goal: What it is that we want to achieve.

Strategy: How are we going to get to the goal(s).

Tactic: A detailed action (operational) plan on how to execute the strategies

SWOTs: Strengths, Weaknesses, Opportunity and Threats. (First two are internal; Second two are external to the congregation.)

Capacity: the ability to accomplish the goal involving money, personnel (lay and/or professional), and time.

The Strategic Planning Committee recommended that each Task Force Report be taken up at 4 sequential board meetings, beginning in September. The congregation will also be invited to attend these open board meetings. The Board of Directors of Temple Beth El need to approve formally each of the recommendations before action can be taken on them.

My deepest thanks and appreciation personally to all those who participated in any aspect of this plan.

Respectfully submitted,

Ivan Schonfeld, Strategic Planning Chair

TBE Mission Statement (as stated on our website)

It is the mission of Temple Beth El to be a welcoming, egalitarian congregation which strives to meet the diverse spiritual, religious, educational and social needs of its members within the framework of Conservative Judaism.

Our congregation rests on the three pillars of Torah/Study, Avodah/Prayer and Gemilut Hasadim/Acts of Loving Kindness.

Temple Beth El promotes Jewish growth through life-long learning from childhood through adulthood.

Our synagogue provides participatory and inclusive prayer experiences. Inspirational services offer a path that brings us closer to each other and to God.

The congregation is dedicated to providing a nurturing environment in which members of all generations feel at home and share each other's simchas and sorrows. In the spirit of Tikun Olam, together the congregation embraces the larger community in which we live, the Jewish people and the State of Israel.

Why A Strategic Plan

Our endowment fund must grow in order to meet the TBE mission. (How do we ask people for money if we do not know how it will be used?)

An alternative source of revenue other than dues must be found.

Key Steps in the Process

- We applied for and were accepted to become a part of the USCJ SULAM Program. This program will help us determine a road map that takes our vision to action.
- A Strategic Planning Committee was formed.
- Focus Groups were held for narrative data gathering.
- A SWOT analysis was conducted with the Strategic Planning Committee, member focus groups, clergy, staff and lay leaders.
- The analysis of the SWOTS produced four strategic pillars:
 - Ritual and Service
 - Membership Engagement and Retention
 - Leadership and Professional Resources
 - Finances and Sustainability

Five priority areas were identified:

1. We will grow and strengthen our membership
2. We will enhance ongoing and develop new leadership models
3. We will find an alternative source of income/revenue other than dues
4. We will explore additional and alternative religious service practices
5. We will increase and improve our communications.

Strategic Plan Mission (combination of all task force mission statements)

The TBE Strategic Planning Task Force is dedicated to meet the mission of our synagogue as we strive to become a welcoming house of worship and place to engage with other likeminded, yet diverse, conservative Jews. We endeavor to provide a warm, inviting, egalitarian and inclusive environment for members of all ages, led by inspiring clergy and dedicated lay leaders and volunteers. We will be financially sound through membership and endowment, and will be considerate of the financial situations of all.

Task Force Recommendations (summary)

RITUAL AND SERVICE TASK FORCE

- **GOAL:** Increase attendance and participation at **ALL** services
- **STRATEGIES:**
 - To create a participatory and lay-led experience of worship opportunities
 - To ensure that prayer services are welcoming/accessible to all
 - To shorten length of **all** services
 - To encourage more leadership presence at worship experiences

MEMBERSHIP TASK FORCE

- **GOAL:** To create a system where our members are known, appreciated and valued for their interests and talents.
- **STRATEGIES:**
 - To improve membership committee outreach to new and existing members
 - To expand clergy outreach to new and existing members.
 - To Create a volunteer committee
 - To increase volunteerism among members

FINANCES AND SUSTAINABILITY

- **GOAL:** To maintain a balanced budget and create reserves for the future.
- **STRATEGIES:**
 - To increase our endowment fund
 - To participate in the Life and Legacy Program
 - To increase Fund Raising
 - To create a calendar of fundraising
 - To identifying outside revenue sources
 - To use our facility for outside events or programs

Leadership & Professional Task Force

- **GOAL:** To have clergy and professional staff support Temple Mission Statement. To have clergy be our spiritual and worship leaders who motivate, support and teach our congregants.
- **STRATEGIES:**
 - To create Personnel Committee
 - To engage and reach out to congregants at all levels.
 - To continue to work with committees and chairs to enhance spiritual and worship life of congregants, especially with Ritual and Services and Adult Education Committee.
 - To provide continuing education opportunities

Leadership & Professional Task Force

- **GOAL:** To have an inspired group of lay leaders, engaged in all aspects of synagogue life
- **STRATEGIES:**
 - To identify, prepare and train others assume leadership responsibilities
 - To create a leadership succession plan
 - To make board members feel empowered
 - Review job descriptions of key positions and purposes of committees

APPENDIX A

CONGREGATIONAL STATISTICS

Congregational statistics

Prep: 2/15/17

MEMBERSHIP COMPARISONS				
Category of Members	2016		2011	
Membership Categories	Mem ber Units	%	Member Units	%
Full Dues & Pew Members	272	61%	309	64%
Reduced Dues members	109	24%	125	26%
Associate Members	31	7%	27	6%
Friend Members	14	3%	12	2%
Nursing Homes & Comps	19	4%	12	2%
Total Membership	445	100%	489	100%

Student Jewish Education Breakdown by Category & Age

2016/2017	Category			Enrolled
	Enrolled	Memb.	%	
Hebrew School (PK-2)	21	33	64%	23
Day School (PK-2)	5		15%	?
Not Enrolled (PK-2)	7		21%	?
Hebrew School (3-6)	34	48	71%	53
Day School (3-6)	7		15%	?
Not Enrolled (3-6)	7		15%	?
Midrasha (7,8,9)	21	45	47%	39
Not Enrolled (7,8,9)	24		53%	?
* Shalsholet (10,11,12)	12	58	21%	19
Barrack Academy	7		12%	?
Not Enrolled (10,11,12)	32		55%	?
Total Participants	107	184	58%	134
Shalsholet has 19 students enrolled but 12 are TBE members				

BUDGETARY COMPARISONS

Budgetary Information	2016		2011	
	\$	%	\$	%
Revenues				
Member Dues	533,133	59%	526,514	56%
Contributions and Grants	203,358	23%	166,250	18%
Program Revenue	161,220	18%	243,667	26%
Total Revenues	897,711	100%	936,431	100%
Expenses				
Salaries and Benefits	(582,404)	64%	(605,093)	65%
Overhead & Operating Expenses	(240,209)	26%	(198,476)	21%
Program Expenses	(91,038)	10%	(134,292)	14%
Total Expenses	(913,651)	100%	(937,861)	100%
Surplus/(Deficit)	(15,940)		(1,430)	

Membership breakdown by age

February 2017

Age Range	#	%
0-3	22	2%
4-7	33	3%
8-12	48	5%
13-15	45	4%
16-18	58	6%
19-26	139	14%
27-35	22	2%
36-45	65	6%
46-59	191	19%
60-70	183	18%
71-80	92	9%
81-90	87	9%
91-102	25	2%
Tot.	1010	100%