



STRATEGIC PLAN

ADOPTED MARCH 2009; REVISED JUNE 12, 2013
AND OCTOBER 16, 2019

Preface

In early 2008 the Long-Range Planning Committee recommended that a Strategic Plan be written for Temple Habonim to assist the Rabbi, the Director of Education, and the lay leadership to provide direction for the Temple and to prioritize the many programs and activities available to the congregation. For its initial inspiration, a Strategic Plan sub-committee drew on the findings of a congregational survey and small group meetings conducted during the Rabbi search process that resulted in the Temple's choosing Rabbi Klein as our rabbi. The plan was adopted by the congregation at its 2009 annual meeting, and was updated and revised in 2013. The Strategic Plan is a living document that is periodically reviewed and updated. Now, with the planned engagement of a new rabbi to succeed Rabbi Klein on July 1, 2020, it is especially timely to update the Plan again with what we envision should be the strategic priorities for Temple Habonim for the next five years. This revision was prepared by a small subcommittee consisting of Rabbi Klein, David Perolman, Jodi Sullivan, Alan Buff, Ruth Fain, Nicole Jellinek, Bob Kemp, Karyn Robbins, David Topor, and Alane Torf. The revision reflects inputs we received from members of the congregation and the results of rabbi search focus group meetings and the congregational survey conducted as part of the current search. It preserves the intent of the Mission and Vision as articulated in the 2009 Plan and the 2013 revision and includes updates that we believe will serve the congregation well during the coming five years.

Our Mission

Temple Habonim is dedicated to helping Jewish individuals and households realize lifelong involvement in Judaism, guided by Jewish values. We are a focal point for Jewish life centered upon the responsibilities to fulfill mitzvot, study Torah and participate in the worship of God. As the Reform Jewish presence in the East Bay, Temple Habonim is a gathering place for social and religious programs.

Our Vision

We are committed to ensuring that Temple Habonim will:

Thrive and Grow as the Reform Jewish presence in the East Bay for all who want to affirm and nurture their Jewish faith in a safe and secure spiritual Jewish environment.

Welcome and embrace all who come through our doors seeking an encounter with our rich tradition and heritage.

Attract additional members by offering rich and varied spiritual, religious, cultural, musical, artistic, academic, intellectual, educational, and social programming, without losing the unique character of the Temple.

Support and nurture families in their various life cycle events, providing pastoral care and community support to all who are in need.

Engage in Tikkun Olam, “repairing the world,” striving to fulfill the prophetic call to translate the words of Torah into the works of our hands.

Reach out to the diverse range of Jews in the East Bay area, striving to find avenues of access for all who desire to enter into dialogue with our tradition, including those whose previous religious affiliations may not have been within the Reform Movement.

Maintain and enhance our connection with the greater Rhode Island and southeastern Massachusetts Jewish community.

Build bridges and promote harmony with the local interfaith religious community, as well as the East Bay community at large.

Our Goals

To realize our vision, these are our goals and related strategies that we believe will enable us to achieve them.

- (1) **Continue to provide Jewish religious worship experiences that are varied and engaging for a broad spectrum of congregation members**
 - (a) Balance innovation and tradition in worship services, including the elements of prayer, Torah study and discussion, music, and congregant participation.
 - (b) Encourage and support the rabbi, the song leader, and lay leaders to pursue professional development activities focused on liturgical, thematic and musical approaches to Jewish religious worship.
 - (c) Maintain the physical infrastructure for religious worship, including Torah scrolls, prayer books and other ritual items; apply new technology such as Visual T’filah to services as appropriate; provide assistance for the hearing or visually impaired in order to make religious services accessible to all; and create a welcoming environment for all worshippers.
 - (d) The Ritual Committee will coordinate with the rabbi and the song leader to assess the success of worship services and other religious programs in fulfilling the Jewish

mission of the Temple and responding to congregational needs and will establish an ongoing process for congregant feedback.

(2) Provide engaging and varied opportunities for lifelong Jewish learning

- (a) Employ a professional education director and encourage and support professional development for the education director.
- (b) Encourage and support professional development activities for religious school teachers.
- (c) Maintain an active education committee to develop and implement educational programming in collaboration with the rabbi and the education director; evaluate programming, including participation and attendance at educational activities, and student, parent/guardian, and teacher satisfaction with programming; and establish an ongoing process for congregant feedback.
- (d) Provide learning opportunities for pre-B'nai Mitzvah age youth, post B'nai Mitzvah age youth through young adulthood, and families.
 - 1. Develop and enhance learning activities for toddlers/young children
 - 2. Develop and enhance a stimulating and engaging Religious School experience to include activity-based learning, experiential components, and an innovative curriculum.
 - 3. Develop and enhance stimulating family learning and adult learning experiences, including experiential learning, guest speakers, and music.

(3) Create a self-sustaining, financially secure institution

- (a) Expand the role of the Membership Committee with the objective of attracting new members every year and retaining existing members.
 - 1. Review demographic information to better understand implications for Temple membership.
 - 2. Create a strategic membership plan with specific goals for membership, using demographic data and URJ as a resource.
 - 3. Welcome members with a buddy system.
 - 4. Facilitate the formation of small social groups to connect and retain members.
 - 5. Hold exit interviews when members leave.
- (b) Build a culture of giving to the Temple.
 - 1. Encourage and recognize financial contribution to Temple operations, including the general fund and various special purpose funds.

2. Strengthen the Temple's endowment fund by regular communication with Temple members about the fund.
 3. Follow up with legacy gifts designated in last endowment campaign and actively pursue additional gifts.
 4. Create a separate endowment fund for the religious school.
- (c) Maintain and enhance the Temple Building and Temple-owned property.
1. Estimate major expenses for the next 5-10 years.
 2. Increase the Building Fund line item.
- (d) The Finance Committee will provide comprehensive oversight of financial and development activities.
- (e) Periodically review the dues structure.
- (f) Develop a comprehensive data base to address financial and membership needs.
- (g) Have at least one fundraising event annually to supplement other sources of Temple income, as well as to increase the social connection of Temple members.
- (4) Strengthen our Culture of Social Responsibility**
- (a) Maintain a strong, engaged Social Action Committee consisting of multiple community leaders.
1. Plan for regular reporting on Committee activities to Board, in newsletter, at services, in Religious School and Temple programs to enhance outreach and interest congregants in participating.
 2. Update all Temple marketing materials to highlight social action, including strong statement on website and social media pages.
 3. Support the work of congregants in social justice efforts that align with the priorities of the Committee and the Religious Action Center of Reform Judaism ("RAC").
- (b) Encourage annual priority setting for Committee on area(s) of focus and specific activities and interventions; and identify interested participants.
1. Utilize resources of the RAC.
 2. Coordinate activities with the Religious School community.
 3. Coordinate an annual "fair" during Religious School to engage both students and adults in Social Action activities.
- (c) Partner with local interfaith and secular organizations to broaden the scope of social action work.

- (d) Use social action as a basis for intergenerational Programs.
 - 1. Establish small groups such as chavurot and rapid response teams to meet exigent needs of congregants and the community.
 - 2. Collaborate with other congregations.
 - 3. Encourage congregational involvement in religious school and youth group Mitzvah projects.
- (e) Develop tool(s) for measuring effectiveness of social action efforts.
- (f) Maintain and support a culture of caring.
 - 1. Regularly assess the responsibilities of the Caring Committee, including: sending cards for losses and simchas, offering meals, offering rides, planning for in-synagogue funerals, coordinating food for shiva.
 - 2. Support the rabbi's efforts to educate congregants on the responsibility of members of a Jewish community for life cycle events, *e.g.* shiva.

(5) Promote and Increase Leadership and Participation to Strengthen the importance of Temple Habonim in the lives of its members

- (a) Recognizing changes in the demographics and priorities of the community, explore new and evolving approaches to leadership and engagement.
 - 1. Encourage active participation of Temple members by including volunteer hours as part of the membership commitment.
 - a. Review the structure of Temple committees with consideration of focusing volunteering on more discreet tasks.
 - b. Instill a culture of shared responsibility to broaden engagement of congregation members.
 - 2. Continue to encourage diverse programming to attract participation from within and outside the congregation.
 - 3. Review the Temple's mission statement to more closely align with participation strategy.
 - 4. Utilize outside expert advice on engagement strategies and study and emulate best engagement practices in religious and secular organizations.
 - 5. Utilize existing and new communication tools to broaden the ways in which members/non-members become informed about community activities and priorities.
 - 6. Invest in technology to collect and report on more nuanced data, and empower staff and volunteer leadership to use data to further the goals of engagement and community building.
- (b) Develop and continue best practices in management and transparency of the institution to instill confidence and sustain the fitness of the organization.

1. Periodically review the by-laws, policies and procedures of the Temple and make changes as needed to uphold our mission.
2. Pursue ongoing evaluation of the role of Treasurer.
3. Create an institutional “memory” and archive of Temple records.
4. Maintain appropriate human resource policies documented in an employee handbook.
 - a. Conduct annual reviews of the rabbi by the President, the Vice President, and the Immediate Past President.
 - b. Conduct annual reviews of other staff members.
5. Arrange for biennial audits of Temple financial records by an independent CPA.

Process for Review and Implementation

The following steps should be followed to assure implementation of the Strategic Plan:

1. Circulate the revised Strategic Plan to the Board of Trustees for consideration, any necessary revisions, and endorsement.
2. Publish the revised Strategic to the members of the Congregation.
3. By June 30 of each year the Executive Committee of the Board, in consultation with the Rabbi and the Director of Education, should establish recommended priorities for implementation the following Fall and invite feedback from the respective committee chairs concerning these priorities.
4. By October 15 of each year, each of the committees of the Temple should
 - (a) make plans for implementation of the priorities established for the fiscal year in progress and continuation of the ongoing functions of the committee and
 - (b) develop appropriate metrics for evaluation of progress in meeting goals.
5. Implementation plans should include budgetary requirements for implementation, subject to approval in accordance with the Temple’s normal process for development and adoption of the Temple budget.

The Strategic Plan should be reviewed in its entirety at five-year intervals by the Long-Range Planning Committee or a designated subcommittee and presented to the Board and the Congregation as described above in order to assure that it remains current and responsive to the needs of the Temple. Changes to the Strategic Plan may be made more frequently if necessary to address emerging needs of the Temple.