



Congregation Beth Shalom Strategic Plan

December 17, 2008





EXECUTIVE SUMMARY

On behalf of the Strategic Planning Task Force, we would like to thank the Board of Directors for presenting us with the opportunity to create a three-year Strategic Plan for Congregation Beth Shalom. We are also grateful to the many congregants and staff members who assisted us in collecting the information, which was used to prepare our Environmental Analyses and Recommendations. This data, which is included as an appendix to the report, should be very helpful in the initial phases of the implementation process.

The Vision of this Plan has three focuses: **Spirituality, Community and Jewish Learning**. The Plan also addresses three critical issues: *Increase Membership, Strong Leadership and Financial Stability*. Recommendations have been made for all six of these areas.

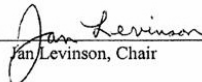
As the draft of this Plan was discussed with congregants during the research phase, we were repeatedly reminded that previous planners had struggled mightily with many of the same issues that troubled us. Unfortunately, they also reminded us that these plans were not acted upon, and they wondered how implementation of this Plan would be any different.

The Task Force was concerned about this very important question. We concluded that the Congregation's current governance arrangement was at the root of our inability to succeed. Simply put, we believe that if this Plan is going to be successfully put in place, the Congregation needs to create a new, more flexible organizational model.

Therefore an essential element of the current Plan is the restructuring of the board of directors and standing committees. A key feature of this restructuring is to assign responsibility at the Executive Committee level for various aspects of the Plan. The Executive Committee was asked to put the new leadership configuration in place by Spring 2009. It is also recommended that an advisory board be created to collaborate with the executive director to monitor and report progress on the Plan to the Board of Directors on a quarterly basis.

The Task Force is confident that our Congregation will be able to move forward with this Plan. This will not be easy, but the implementation process will present the Congregation with many exciting opportunities over the next three years.

Chazach V'amatz – Be strong and take courage.

By: 
Jan Levinson, Chair


Steve Moritz, Co-Chair

And By Task Force Members:

Sheldon Catz Bunny Morris
Milt Eisner Connie Pollack
Edward Frim Jean Reznick
Cindy Goodman-Leib Rob Zaremborg
Ellen Missry Nancy Zionts

Ex-Officio:

Ira Frank, President
Rabbi Michael Werbow, Assistant Rabbi
Lee Levitt, Executive Director





Strategic Planning Vision

Spirituality

*Increase
Membership*

*Strong
Leadership*

Community

**Jewish
Learning**



Financial Stability





Strategic Planning Vision

Spirituality

- Realize a relationship with G-d
- Connection to Judaism and Torah
- Blend of tradition and modern ideas within Conservative Judaism
- Strengthen Hebrew knowledge and prayer skills

Community

- Support each other in our lifecycle events
- Programming that brings us together
- Exceptional and vital services like pre-school, catering and cemetery

Jewish Learning

- Tools for living a Jewish life
- Find meaning and purpose in Judaism
- Promote education for all





Summary of Environmental Analysis

- Information gathering process covered all of the major areas of the synagogue
- Conducted interviews of both lay leadership and staff focusing on current status as well as recommendations for improvement
- Reviewed data gathered during focus groups for Clergical Task Force
- Reviewed all relevant congregational data including membership statistics, finances and Constitution and By-Laws
- Consulted external data such as the UJF Community Study and national synagogue support sites like USCJ, Synagogue 3000, STAR, Alban Institute* and the Wexner Foundation

* Alban Institute is an independent interfaith organization that provides resources to congregations with a focus on learning and leadership development.





Summary of Environmental Analysis

Our Members (information collected September 2008)

- 903 Member Units in 13 categories with about 69% paying in excess of \$500 of dues
- 45% of our members are older than 60 years old
- Approximately 25% of the eligible students participate in the youth group events (20% is national average)
- Religious School has approximately 64 students from 45 families with only 2 in the current kindergarten class (about 100 K-8 Beth Shalom students go to Community Day School)
- About 135 children attend the pre-school of which more than half are from families that are either non-members or first year members (membership is not required to attend pre-school)
- Currently, we reach out to new members with new member baskets and occasional phone calls and letters from the rabbi
- Alternate means for communicating with our members and the community, such as email, central phone system and revising & updating our website should be utilized.





Summary of Environmental Analysis

Our Members

	Year Ending				
	<u>11/30/2004</u>	<u>11/30/2005</u>	<u>11/30/2006</u>	<u>11/30/2007</u>	<u>11/30/2008</u>
New Members*	33	37	40	41	33
Resignations:					
Moved	(15)	(24)	(18)	(19)	(19)
Deceased	(16)	(5)	(17)	(15)	(15)
Left after Preschool	(4)	(14)	(7)	(2)	(2)
Changed Congregations	(5)	(13)	(18)	(2)	(2)
Not Interested	(27)	(43)	(43)	(9)	(9)
No Reason/Other	(4)	(19)	(3)		
Total Resignations	(71)	(118)	(106)	(47)	(47)
Net Gain/(Loss)	(38)	(81)	(66)	(6)	(14)

A loss of at least 30-35 members per year are out of our control

But we can control the other losses and our growth

***Note:**

Families joined due to Preschool

7	13	10	28	19
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Summary of Environmental Analysis *Our Programs and Services – Religious Programs*

- Clergical Services Task Force has completed a detailed assessment of our religious programming and lifecycle services. The issues they are most concerned about include:
 - Attendance at Shabbat services and daily minyan
 - Consistency in services and rituals
 - Transition of clergy and how this will impact lifecycle events
 - Ways to increase learning opportunities during services as well as other educational programming
 - Use of music during services
 - Creative ways to use our building and sanctuaries
 - Religious services for children and teens





Summary of Environmental Analysis *Our Programs and Services – Adult/Family Programs*

- Sisterhood and Men’s Club are both stable with consistent leadership however they have a limited amount of active volunteers and people who are willing to step into leadership positions
- These auxiliaries offer a wide variety of support to the congregation through donations, running the Judaica Shop, etc.
- Both auxiliaries sponsor Adult Education opportunities throughout the year, offering Torah study, speaker programs, entertainment, and special Shabbat weekends
- Both are concerned about how to get younger members involved
- There are a variety of Family Social Programs (but not many educational programs) that take place throughout the year, such as monthly Friday night Shabbat Alive services (or spiritual experiences), and Holiday services and programs





Summary of Environmental Analysis

Our Programs and Services – Youth Services

- Youth Services has been a recognized strength for Beth Shalom because of our stable Pre-School and our Youth Group programs that provide consistency in leadership and programming all the way from K through 12
- The Pre-School is growing and has a waiting list with its major strengths being its Jewish content, flexibility of childcare/preschool schedules, and teacher quality
- Pre-School teacher retention and quality is strong but pay scale is making it difficult to recruit and retain teachers
- Major key to success for the Youth Department is to have a strong Youth Director
- The religious school operates separately from the pre-school and other youth programming so activities and curriculum are not always coordinated





Summary of Environmental Analysis

Our Facilities

- Main sanctuary is seen as too big and not comfortable for various services
- Building is in good condition but there are certain capital issues like better controls for the HVAC system and water/brick maintenance issues
- Repair/replacement of equipment is not scheduled and there is no written maintenance manual or replacement plan
- Catering is recognized as a potential revenue source and the Catering Committee is looking at several ways to improve this service
- Cemetery is well run but is facing challenges with keeping up with maintenance, competition from Homewood Cemetery and financial burden of the mausoleum
- Cemetery committee is working on recommendations for an interfaith section





Summary of Environmental Analysis

Our Finances

- In 2007 Beth Shalom operated at a positive operating income for the first time in five years but in 2008 is projected to have an operating loss of approximately \$75,000
- This year will be the first with a professional review by a certified accounting firm and will allow CBS to be in a position to apply for grants
- 2008 PA education tax credit of \$100,000 is not guaranteed each year
- There is no plan to grow the endowment and there are limited dollars available in capital accounts to meet current and projected capital needs
- Catering, Cemetery, Pre-school and alternate uses of the building all have the opportunity to increase revenue with investment in capacity and/or marketing
- Fundraising is sporadic and primarily done in small “nickel/dime” opportunities
- Dues structure is considered complicated with 13 different categories
- We utilize congregational emails, letters, Shabbat bulletins and bulk mailings to spread the word about upcoming events and happenings but mailings are excessive and costly
- We don't have a built-in budget for marketing – it gets built into each individual program or event





Summary of Environmental Analysis

Our Leadership and Staffing

- Current Mission Statement is broad and does not provide clear direction
- Beth Shalom is governed by a Constitution & By-Laws that was most recently modified in May 2005 that changed the nomination process, expanded the President's role and established a Personnel Committee
- Staffing is more stable with Executive Director in place but key positions continue to turn over
- Board of Trustees has overall responsibility to run the Congregation but the effectiveness of the Board is questionable due to its size and meeting format
- Executive Committee consists of President, four Vice-Presidents, Secretary, Treasurer and Assistant Treasurer plus all Past Presidents and Honorary Presidents
- There are 13 Standing Committees along with the Sisterhood and Men's Club and they operate in a silo mentality
- Some Committees/Auxiliaries, such as Adult Education Committee, Men's Club and Sisterhood, do not have any staff person designated to work with them
- No formal leadership development process for lay leadership is in place





Summary of Environmental Analysis

The Demographics

- Squirrel Hill remains a vibrant middle-class urban neighborhood and the institutional core of the Jewish community but Pittsburgh's primary economic growth has been in the suburbs
- However, it also consists of an aging Jewish population with a declining number of students and declining membership in most non-orthodox congregations
- Several institutions are offering competing services for Jewish pre-school, Jewish day school, conservative religious school, Jewish cemetery and even kosher catering
- Younger Jews tend to be less committed to a certain ideology or institution and instead are interested in more intimate communities and experiences
- Pittsburgh's intermarriage rates mirror the national trend with up to half of our young Jews marrying outside our faith
- The Reform and Chabad/Orthodox movements are growing and are marketing themselves





Summary of Environmental Analysis

Outside Resources

- Many national organizations exist that are focused on how to help traditional congregations survive and prosper
- Some of these national groups charge for their services but can bring proven models along with training and tools for success
- Pittsburgh also has many different organizations where we could create partnerships and collaborations to enhance the experience that our synagogue can offer and help reduce costs
- We currently have partnerships with the AJL, Community Day and the UJF
- Potential partners include the JUC, JF&CS, JCC, JRS and JAA in areas like community service, outreach, support of Conservative university students, etc.
- Partnerships and/or mergers with other Congregations can bring more elaborate adult learning, joint religious schools, youth programming and various havurot or informal events





Recommendations





Strategic Planning Recommendations

Spirituality

- Utilize external support resources to evaluate new ideas to increase participation in Shabbat and daily minyan services
- Promote use of music during religious services
- Provide education for congregants in prayer and torah skills
- Create family educational opportunities
- Develop a long-term solution for how to best utilize the main sanctuary





Strategic Planning Recommendations

Community

- Find more innovative ways to share and promote lifecycle events such as a Beth Shalom blog or newsletter
- Create mechanism that encourages members to develop and participate in innovative programs
- Develop a process to engage with members who are here primarily for specific programs like pre-school





Strategic Planning Recommendations

Jewish Learning

- Develop a Jewish Learning Cabinet to coordinate Jewish learning throughout the congregation
- Create ways to increase Jewish learning opportunities during services
- Identify other partners within the Jewish community that can enhance our Jewish learning program
- Coordinate youth programming and youth services with the religious school to create a more cohesive and comprehensive offering





Strategic Planning Recommendations

Financial

- Develop a more comprehensive revenue plan that includes fundraising, dues and fees to fully support the current annual operating budget
 - ✓ Operate each fiscal year under a balanced budget
 - ✓ Stabilize dues and fees structure
 - ✓ Establish short and long term fundraising goals and consolidate fundraising program
- Increase the endowment and pursue grants to support long-term capital and program needs
- Continue with professional review/audit
- Develop plan to maximize opportunities with catering, cemetery, pre-school and alternate uses of the building to increase revenue and to decide on investments in capacity and marketing





Strategic Planning Recommendations

Membership

- Increase membership and retention by analyzing the demographics and environmental data and then implementing targeted programs and/or merger opportunities
- Set specific goals to measure success
- Invest in a coordinated marketing effort
- Utilize alternate means for communicating with our members and the community, such as email, central phone system and revising & updating our website.
- Communicate Beth Shalom's Vision to the community
- Define Beth Shalom's leadership role in the community





Strategic Planning Recommendations

Leadership

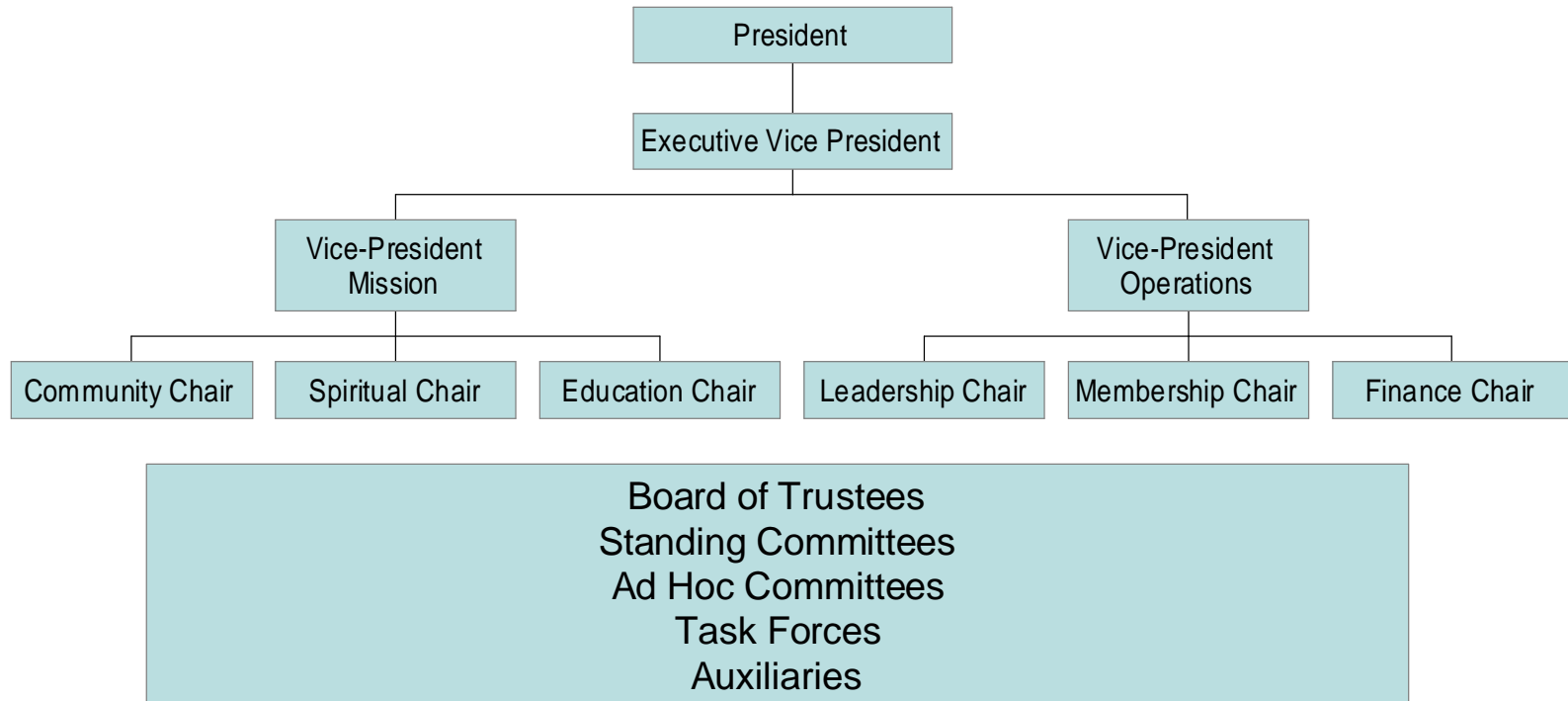
- Create an organizational structure that can effectively implement the Strategic Plan
- Modify the Board of Trustees so that it can more effectively manage the congregation
- Identify and nurture current and future lay leaders
- Create a leadership development process
- Formalize process to recruit and support qualified professionals
- Assign a staff member to all Committees/Auxiliaries





Strategic Planning Recommendations

Leadership





Next Steps

1. Set up Advisory Group to monitor the Implementation
2. Coordinate the Implementation through the Executive Committee
3. Set goals to have new leadership structure in place by Spring 2009 and to have programs initiated by Summer 2009

