

EXECUTIVE SUMMARY

As it approaches nearly 50 years as a congregation, Temple Beth Ami is facing the challenge of gradually declining membership and uneven involvement by various components of the membership. Since its peak of approximately 1,200 family members in 2000, membership has fallen more than 20 percent. It now stands at roughly 915.

Through brainstorming and ideation, followed by focused research, the aim of TBA Strategy 2020 is to develop a refreshed and sustainable way forward for Temple Beth Ami such that the institution remains an attractive center for Jewish worship, learning, culture and community in a changing environment.

In preparation for strategic planning, the Board of Directors hired a consultant, Beth Michaels to help guide the strategic planning process. It appointed Tom Temin and Nancy Shapiro to co-chair the project.

The first step on this journey was to invite the entire congregation to participate in a series of facilitated small group sessions to provide input on four questions all designed to gather information about the TBA community from congregants and others affiliated in some way with Temple Beth Ami. This first stage of planning is called “the vision journey.”

1. What do you find compelling about being a member of a synagogue?
2. What would be missed if TBA went away?
3. What would you consider to be meaningful evidence of TBA’s success, evidence that we are fulfilling our vision and purpose?

More than 250 individuals participated in 21 house and affinity group meetings. The goal of the House Meeting initiative was to tap the congregation’s interests and passions relative to synagogue affiliation in general, TBA’s role in their lives today, measures of TBA’s sustainable success and ideas for improvement.

From an analysis of the notes from all the facilitated meetings the consultant, Beth Michaels, drew the following major themes, sorted in to two large buckets: “Desires/Strengths and Assets” and “Areas of Focus/Changes.”

The following sections are taken directly from Ms. Michaels report:

Desires /Strengths / Assets

- Deep appreciation for the clergy and spiritual programming: Torah study, services, music, ritual events / holidays and special events like the Picnic Shabbat; support in difficult times
- Deep appreciation for the temple’s commitment to inclusiveness, liberal attitude, education and social action.
- Deep commitment to Judaism with generational continuity
- The shared commitment to social action and opportunities to volunteer

- The shared belief that more engagement begets bigger benefit
- Appreciation for the [Temple's geographic] location

Areas of Focus / Changes

- Developing the Board toward leadership that is in sync with the primary principles of effective governance: stakeholder engagement and empowerment, setting and leading from values, vision, mission, strategy and goals, monitoring results while empowering clergy, staff and congregants on the means or ways to produce those results, spending its time on the highest value issues, debates and discussion, and clarified expectations of board members with regular board and board member assessments.
- Generating a robust leadership pipeline, with young singles and families contributing to synagogue life and TBA's future direction.
- Securing financial stability with an aligned dues model and a new culture of giving.
- Across all age and stage demographics, creating small group opportunities to connect and engage.
- Attracting, engaging and retaining younger people; appreciation for the competitors for time and money, from both secular and Jewish spirituality/educational perspectives.
- Advancing connectivity, community and communications with significant technological upgrades and web presence
- Generating a vibrant youth culture, including a growing confirmation class and more social opportunities / opportunity to connect
- Changing from using our temple assets/resources only when in need (filling voids) to wanting to use them more (desires); more engagement all the way around.

TBA's proud and durable reputation for meaningful, quality religious study, services, spiritual support, education, social action, programming and heartfelt community comes through loud and clear. Areas for improvement will not be surprising and are coupled with an expansive set of ideas and suggestions from which the developmental work can begin.

From these responses, Beth Michaels anticipates a series of transitions or "shifts" that will be part of the strategic planning process. The hard work is contained in the deep cultural shifts that underpin the House Meeting input and feedback.

1. Moving from "what's in it for me" to "what makes a sustainable congregation important to me?"

2. Moving from a clergy/staff led congregation to that of a clergy/staff/lay leader partnership.
3. Moving from reactive communications and changes to a commitment to regular stakeholder input, feedback and program improvement.
4. Moving from a dues dependent financial model to a culture of giving.
5. Moving from traditional communications to the most promising practices in the digital age, particularly important to our millennial population.
6. Moving from building-bound programming to going where the people are, whether that be virtual connections for the home or office bound members or using a variety of locales for services and programs.

The anticipated outcomes from these shifts include:

- An engaged board that uses its precious time, energy and resources in stewardship of TBA's core values, vision, mission, strategy and budget, in concert with regular congregational input and in partnership with clergy and staff.
- A diverse, thriving congregation that drives creative programming and continuous improvement.
- Multi-generational opportunities for engagement across spiritual, educational, social justice, and fund development goals.

Next Steps

Members of the TBA Board, 2020 Vision Steering Committee, and 2020 Advisory Committee will meet with Beth Michaels at an in-house "retreat" on April 21-22 to review the findings and analysis of the house meetings and affinity groups. They'll receive the preliminary reports from the research groups that have been examining topics such as new financial models and modes of affiliation. And the groups will receive and review the draft guiding values document prepared by the clergy.

The Steering committee will work with the consultant to develop a grounded vision statement, and share the revised vision with the entire congregation through multiple communication channels in time for the High Holidays this coming fall.

Between the High Holidays and the beginning of December, the Board will deliberate on each of the identified strategic issues, and make recommendations to the Congregation for strategic decisions. The goal of the steering committee is to enable the Board to make informed decisions roughly by February 2019 – in time for preparation of the fiscal 2020 budget, which starts July 1st, 2019