

# Temple Beth El Strategic Plan Pensacola, FL



February 2014

[www.templebethel.org](http://www.templebethel.org)

*Lo alecha ham'lachah ligmor . . . v'lo atah ben chorin lehibateil mimenu  
The work is not for you to complete – but neither may you choose to absent yourself  
(Pirkei Avot)*

### *Background*

*In late 2012, the Temple Beth El Board of Directors requested that a committee be formed to develop a Strategic Plan. While over the years there have been a number of visioning exercises, retreats and other brainstorming activities, we could not find a documented plan. What information we did find was dated.*

*The Strategic planning process followed the following steps:*

- *Committee formed and became educated in Strategic Planning (purpose & methodology to develop plan)*
- *Decided how committee would go about strategic planning (there are many ways to accomplish it)*
- *Information was compiled from the past (Shabbatons, earlier Board Input, Retreats, etc.)*
- *Developed a list of questions to help us better understand membership views of a desired future*
- *Organized and developed a plan / logistics for collecting updated information from members*
- *With these questions, we held one on one meetings with selective members, a facilitated Board discussion and number of focus groups representing the demographic cross section of our membership*
- *Solicited input from past and current TBE Committees*
- *The information collected was analyzed by the committee to produce the product herewith in consisting of:*
  - *Vision Statement*
  - *Mission Statement*
  - *Guiding Values*

- *Seven Strategic Goals & long term measures of success*
- *Actionable objectives with assignments, timing and estimates where possible of resources needed to accomplish*

*The plan was approved by Temple Beth El Board of Directors on 03/20/2014.*

*We should all note that this plan was not designed to be looked at once and placed on a shelf. For it to be effective it will need to be referred to and acted upon by the Temple Board, its Committees and members who contribute to its implementation. This is a living document which is meant to be reviewed and updated from time to time.*

*Thanks to all the many members of our congregation that have given us their honest input. Special thanks to our outstanding and dedicated Long Term Planning Committee consisting of:*

*Rabbi Joel Fleekop*

*Ray Engel*

*Janet Kahn*

*Alice Klein*

*Charles Kraselsky*

*Fred Levin*

*Marny Needle*

*Alan Sacks*

*Respectively submitted,*

*Your Long Range Planning Committee*



## **Mission Statement**

Temple Beth El is a vibrant, welcoming Reform Jewish congregation that embraces the enduring Jewish tenets of worship (Avodah), life-long study (Torah), social responsibility (Tikkun Olam) and community (Kehillah).

## **Vision Statement**

Temple Beth El strives to be the spiritual, educational, and social center for Reform Jewish life in the Pensacola, Florida area. We welcome all who share in the celebration of Jewish life and aim to be a significant and meaningful part of our members' lives. We are dedicated to sustaining and growing our rich Jewish heritage while engaging our diverse, dynamic, and intergenerational community. As we share our past, together we proudly shape our future.

## Values Statement

*Brit Kehillah: Community Covenant:* Foster transparent, open and responsive leadership. Be a respectful and positive, forward thinking community, open to new ideas, while honoring our rich history.

*K'lal Yisrael –Inclusive Community:* Support multiple pathways to Jewish observance and embrace diversity within our Temple community.

*Avodah – Community Worship:* Create vibrant, inspirational, and spiritual worship that brings us closer to God and one another.

*Chaverut – Friendship:* Create and foster friendships that transcend the walls of the Temple. Through camaraderie we create a holy and committed community.

*Tikkun Olam – Repairing the World:* Honor our sacred Jewish obligation to make the Pensacola community and the world a better place

*G'milut Hassadim – Acts of Loving Kindness:* Support one another through life's challenges and share as a community in life's celebrations.

*Talmud Torah – Lifelong Learning:* Support Jewish lifelong learning to deepen Jewish identity & commitment.



## Strategic Goal

Provide Meaningful & Engaging Worship for All Temple Members

### 5 Year Goal

Increase Shabbat worship attendance to an average of 50 people per week

### Supporting Objectives

<b>1 Provide Comfort and Ease of Access</b>				
	Objective	Who	By When	\$ Resources Needed
A	Initiate programs by which majority of service attendees know one another on a first name basis	Ritual Committee	June 2014	< \$500.00
B	Maintain & advertise the availability of babysitting as evidenced by positive survey feedback	Ritual Committee	April 2014	insignificant
C	Make use of electronic media (CDs, Podcast, streaming) to permit shut-ins, travelers, indisposed members to avail themselves of at least one service per month	IT Sub Committee	April 2016	\$10,000

<b>1 Provide Comfort and Ease of Access (continued)</b>				
	<b>Objective</b>	<b>Who</b>	<b>By When</b>	<b>\$ Resources Needed</b>
D	Add an elevator & publicize to permit ease of access for disabled members	Renovations Committee	July 2016	See Campus Plan
E	Redesign sanctuary seating and Bimah position to make services more comfortable, intimate and no barrier to Aliyah	Renovations Committee	July 2016	See Campus Plan
<b>2 Enhance Worship</b>				
A	Develop at least two innovative services per year	Ritual Committee	Each year of plan	<\$2,500.00
B	Publish a schedule for types of services (locale, music, media, themes, degree of Hebrew, length) designed to maintain regular attendees and generate additional member attendance by >=15% new faces	Ritual Committee	November 2014	insignificant
C	Make it easier to follow services through use of aesthetically pleasing electronic media (e.g. projection system) as judged by survey feedback	Ritual Committee	March 2015	\$10,000
D	Coordinate at least two regional services each year with nearby congregations	Ritual Committee	Fall 2014 & ongoing	\$5,000



## Strategic Goal

Invigorate and Build Membership

### 5 Year Goal

25 new member families (gross) over five year period

### Supporting Objectives

<b>1 New Member Growth</b>				
	Objective	Who	By When	\$ Resources Needed
A	Develop and sustain a publicity campaign to increase the community awareness of what is happening at TBE & with its members	Communications Committee	June 2014	\$2,000.00
B	Initiate a calling campaign & personal invitations to special events	Membership Committee	May 2014	<\$500.00
C	Make membership financially assessable to individuals and families	Finance Committee	July 2014	TBD



<b>2 Increase Member Engagement &amp; Retention</b>				
A	Initiate a calling campaign & personal invitations to special events	Membership Committee	May 2014	See 1B
B	Form a functioning Caring Committee to address such member needs as Shiva, transportation, meals for sick, new member welcomes, etc	Sisterhood	June 2014	<\$3,000.00
C	Provide new member Shabbat & Orientation Program	Membership Committee	October 2014	<\$500.00
D	Programs that bring Temple members together	See Community	Ongoing	



## Strategic Goal

Inspire Learners of All Ages to Engage in Educational Opportunities & Build a Culture of Ongoing Jewish Lifelong Learning

## 5 Year Goal

>50% of membership attends at least one educational event

Larger number of children in Religious school as % of TBE families with children

## Supporting Objectives

<b>1 Vibrant School for Jewish Living</b>				
	Objective	Who	By When	\$ Resources Needed
A	Develop enrichment program, including art, music, and cooking	School for Jewish Living	September 2015	<\$500
B	Improve skill and competency of teachers	School for Jewish Living	Ongoing	TBD
C	Evaluate curricular materials	School for Jewish Living	Ongoing	TBD

D	Introduce Hebrew into Sunday program	School for Jewish Living	September 2014	<\$500
E	Enhance learning environment (i.e. white boards, technology)	Renovation Committee & School for Jewish Living	September 2016	TBD

## 2 Participation in Adult Learning

A	Through books, routine Judaism classes, podcasts, video lectures (i.e. IHMC program) etc. make majority of members knowledgeable of the basics of Jewish history, laws & rituals, and other topics of Jewish interest.	Adult Education Committee	May 2016	<\$2,000.00
B	Continue learning opportunities outside of Temple campus.	Adult Education Committee	August 2014	<\$500.00
C	Develop a curriculum for a 2 year period.	Adult Education Committee	November 2014	<\$500.00
D	Create learning and discussion opportunities for interfaith families.	Rabbi	January 2015	<\$500.00
E	Host a Scholar's Weekend bi-annually.	Adult Education Committee	Each Year	<3,000.00



## Strategic Goal

Provide for Effective, Open and Continuing Leadership

## 5 Year Goal

Have it be an Honor to serve on the Board and make board membership a desired position

## Supporting Objectives

<b>1 Have a united and strategic view of the long term future of Temple Beth El</b>				
	Objective	Who	By When	\$ Resources Needed
A	Complete Strategic Planning Process, and gain approval by board and by membership of Temple	Planning Committee & Board	May 2014	-0-
B	Implement Strategic Plan	Board, Committees Rabbi Congregation	Immediately and according to timelines	See individual line items
C	Gain consensus on methodologies for fundraising and priorities for campus growth and renovations	Board	March 2014	



	audio visual equipment, copier, care of ritual objects, sale of perpetual care agreements.	for each item	July 2015	
<b>3 Vibrant and open board communications with Temple members</b>				
A	Have all board meetings open and dates published early	Board	Ongoing	
B	Minutes from board meetings available to all members within 1 week of final board approval.	Board Secretary	June 2014	
C	Meetings with representatives of board for any interested members	Board members	Quarterly	<500
D	Make effective use of resources provided by the Union for Reform Judaism	Board, Staff, and Committee Leaders	Ongoing	-0-
E	Keep communications open and transparent with members	Board and Communication Committees	Ongoing	



## Strategic Goal

Provide Opportunities for Temple Members to Work / Play Together, to Serve the Temple, One Another and the Community at Large

## 5 Year Goal

>60% of members participate in two or more programs.

TBE is highly regarded by the greater community for their contributions

## Supporting Objectives

<b>1 Expand Social Relationships</b>				
	Objective	Who	By When	\$ Resources Needed
A	Organize social events for each demographic group on at least a quarterly basis	Rabbi, Outreach, Membership Youth Group,	June 2014	\$2,000.00

		Sisterhood, Brotherhood Committees		
B	Establish the methodology for a Calling campaign & personal invitations to special events	Membership Committee	May 2014	<\$500.00
C	Make membership financially accessible to individuals and families	Finance & Membership Committee	July 2014	TBD

## 2 Social Action

A	Community “Mitzvah” projects conducted by multi-generational congregants. Target 3-4 opportunities per year	Sisterhood, Brotherhood, Social Action Committee, School, Youth Group	June 2014	<3,000
B	Publicize TBE activities in various ways including inclusion of the “Faith at Work” section of PNJ	Communicati ons Committee	August 2014	<\$500.00





## Strategic Goal

Establish a Strong **Financial** Foundation to Meet Short Term Needs & Long Term Strategic Plans

### 5 Year Goal

Capital Building Fund Capable of Supporting the Plans for TBE Campus

Build a 1 MM\$ Endowment

Manage TBE Budget to Maintain Solvency for the next 5 years

### Supporting Objectives

<b>1 Building Fund</b>				
	Objective	Who	By When	\$ Resources Needed
A	Through vision and good salesmanship extol needed funds from congregants	Financial Committee	June 2014	\$2,000.00
B	Obtain grants that may be available for Temple facilities	Financial Committee	May 2014	<\$500.00
C				

<b>2 Build an Endowment to Sustain Long Term Operating Costs</b>				
A	Develop an active planned giving program	Finance Committee	May 2016	See 1B

<b>3 Improve Annual Budget Position</b>				
A	Cultivate younger members through a low barrier of entry membership program	Board	July 2015	-0-
B	Develop an annual fundraiser able to generate > \$8,000	Volunteer	January 2016	-0-



## Strategic Goal

Improve facilities to make Temple Beth El energy efficient, welcoming and with no stumbling blocks to entry

## 5 Year Goal

Have an updated, accessible, comfortable and functional campus for all members and guests

*Make TBE a Beacon to Attract Members, Non-affiliated Jews and others Interested in Judaism*

## Supporting Objectives

<b>1 Provide a welcoming and accessible campus</b>				
	Objective	Who	By When	\$ Resources Needed
A	Provide appropriate signage and create a welcoming entry that includes a covered drop-off for members and guests.	Renovations Committee	July 2016	TBD - as part of an ~\$1.6million renovations project
B	Remove the Pinn building and increase parking availability to include appealing landscaping in and around the campus.	Renovations Committee	July 2016	TBD - as part of an ~\$1.6 million renovations project
C	Add an elevator and ramps to access the religious school building and sanctuary.	Renovations Committee	July 2016	TBD - as part of an ~\$1.6 million renovations project

D	Move the Administrator's, Rabbi's and Education Director's offices near the main entrance for ease in meeting members and guests	Renovations Committee	July 2016	TBD - as part of an ~\$1.6 million renovations project
---	--	-----------------------	-----------	--

## 2 Provide a comfortable and intimate sanctuary with no barriers to Aliyah.

	Objective	Who	By When	\$ Resources Needed
A	Redesign the sanctuary seating and bimah to promote comfort and intimacy and to improve ease in congregational bimah participation.	Renovations Committee	July 2016	TBD - as part of an ~\$1.6 million renovations project
B	Update lighting, audio-visual and sound systems to include sufficient aids for those with hearing and vision loss.	Renovations Committee	July 2016	TBD - as part of an ~\$1.6 million renovations project

## 3 Enhance use of Temple facilities

	Objective	Who	By When	\$ Resources Needed
A	Redesign the kitchen to include modern appliances and to increase functionality for regular and special events.	Renovations Committee	July 2016	TBD - as part of an ~\$1.6 million renovations project
B	Increase size and modernize the social hall to accommodate more frequent and larger social, religious and educational events.	Renovations Committee	July 2016	TBD - as part of an ~\$1.6 million renovations project
	Objective	Who	By When	\$ Resources Needed

## 4 Provide a more energy efficient campus

A	Use energy efficient lighting throughout campus	Renovations Committee	July 2016	TBD - as part of an ~\$1.6 million renovations project
---	---	-----------------------	-----------	--

B	Update the HVAC systems with zones for “smart use” for improved efficiency	Renovations Committee	July 2016	TBD - as part of an ~\$1.6 million renovations project
---	--	-----------------------	-----------	--