



TEMPLE BETH SHALOM



TBS 2020 VISION INITIATIVE



From Our President...

Temple Beth Shalom is a community of purpose and aspiration.

We come together to pray, to learn, to foster Jewish values in our children, to celebrate life moments and Jewish holidays, to support each another during times of struggle, to work toward a world of greater wholeness, and to enjoy one another's friendship. The question is, how do we create an intentional framework for our community so that all aspects of our congregational life continue to be fulfilling, purposeful, and well executed? And at an even higher level, what do we aspire to be as a Jewish community?

Over the past year, an outstanding TBS leadership group engaged in exactly this kind of reflection and planning to develop our "20/20 Vision," a strategic plan that will take us into the 2020s. Our strategic planning group, was led by co-chairs Jeff Shapiro, Executive VP of the TBS Board of Trustees, and Peggy Lowenstein, a Trustee and member of our Finance Committee. It also included our Senior Rabbis, myself, several members of our professional staff, and a number of community members who brought together view points from across the spectrum of TBS life experience. Together, we considered our accomplishments of the past five years, assessed prior goals that had not yet reached their full potential, and, with input from many other voices in our community, established key congregational priorities that reflect our highest aspirations and our core values.

On behalf of the congregation, I want to thank our 20/20 Vision Strategic Planning group for their dedication to this special project. Their voices and hearts resonate in its words and the success we have in bringing its priorities to fruition will reflect their thought and great care for our community.

L'Shalom,

Bernice Sue

Bernice Sue Behar, *President*



I want to thank our 20/20 Vision Strategic Planning group for their dedication to this special project.



From Our Rabbis...

The Jewish people's first strategic plan was the Torah. Sometimes clearly stated – and, at other times, with greater subtlety – throughout the text, the Torah articulates Judaism's bold vision: to bring forth transformative blessing to society. As God is described as having commanded Abraham and Sarah: “Veh'yei B'rachah” – “Become a blessing.” Through the unfolding of the narrative we find specific vehicles – ‘sacred strategies,’ if you will, to help us bring this vision about: nurturing loving families – creating strong communities grounded in authentic relationships – embracing values that reflect our highest ideals of morality and ethical obligation – participating in rituals and celebrations – engaging in traditions that amplify in meaning as they are passed from one generation to the next – adding voice to prayers that express deepest hopes and feelings of gratitude – being enriched by a Jewish culture that invites sharing in song, laughter, food, literature, and laughter – discovery of wisdom that enables us to find our way in an often confusing world – and spiritual seeking that reminds us that we are all part of something much greater than ourselves.

All that we do at Temple Beth Shalom is related, in some way, to this broader vision of bringing blessing. And our congregation's strategic planning work is intended to help us – increasingly over time – to most meaningfully bring forward a vibrant, caring, and meaningful Jewish community life. Wisely, Beth Shalom's founders instilled within our congregation a culture that is reflective in spirit. And so, throughout our TBS history – periodically – we ‘return to the top of Sinai,’ if you will, in order to gain a 30,000 foot view of where we have been...where we are...and consider anew where we are going.

Our “2020 Vision” Strategic Planning Initiative was true to this mission. Our previous strategic plan (2012) charted the course that led us to this moment in our TBS journey: the exciting completion of a new Temple home; the successful enactment of a unique rabbinic leadership model; the full-blossoming of an innovative, new learning program that has gained attention nationally. It was clear to our leadership that our community was poised to look towards the next visionary vistas.

In the pages that follow, you will find a 2020 Vision plan platform that builds upon our strengths and values.

In the coming years, we envision increased opportunities to bring our members together in new ways through expanded programming, partnership opportunities, and life-mentorship sharing. We envision a sharpened focus on social justice and social action. We envision strengthening our administrative infrastructure, and we envision strengthening support for the philanthropic needs of our Temple community, as our annual membership contributions and program tuitions do not – in and of themselves – allow us to achieve our current and future goals.

Many thanks to our entire 2020 Vision Planning Team, most especially our leaders: Jeff Shapiro and Peggy Lowenstein! And thank YOU, our TBS community, for the partnership that we share in guiding our community from one holy high place to the next!

B'vrachot... With Blessings,

Jay & Todd

Jay Perlman, *Rabbi*

Todd Markley, *Rabbi*

All that we do at Temple Beth Shalom is related, in some way, to this broader vision of bringing blessing.





TBS 2020 VISION INITIATIVE

Unanimously Adopted by the TBS Board of Trustees on November 15, 2017

Introductory Framework:

The Strategic Planning Process Historically and Today

The founders of the Needham Jewish Community Center, the precursor to Temple Beth Shalom, had a strategic vision: Wanting to worship together and to educate their children, their plan in 1953 was to grow membership, hire a Rabbi and build a Temple home. Since then, Temple Beth Shalom has thrived and evolved into a community of 900 families, not by accident, but with active planning by its dedicated lay leaders, clergy, professionals and members who had an unwavering commitment to creating a vibrant Jewish community.

More recently, TBS created and adopted formal Strategic Plans in 2006 and 2012. Each was designed to help guide us, not to the exclusion of other important initiatives and work, but to provide overall structure and to prioritize key congregational goals. Key community initiatives which have emerged as direct results of these strategic plans include:

- Revision of our community's Mission and Vision Statements;
- Realigning our formal leadership/governance structure to reflect our community's values and sacred purpose;
- Developing a unique clergy model that includes two Senior Rabbis which is now being adopted by several other leading Reform congregations;
- Creating a nationally recognized and award-winning programming for youth learning; and
- Rebuilding our Temple home.

Having accomplished many of the priorities of the last two Strategic Plans, we were poised to undertake a new planning process, so that we could continue moving our community forward. Thus began the **TBS 2020 Vision Initiative**. In February 2017, we convened a Strategic Planning Team that included lay members, professionals, and clergy. Lay member representation came from many spheres of community life: parents from our pre-school and K-12 learning programs; empty nesters and beyond; members of our Board of Trustees. In recent years, our TBS community, including our leadership, has studied the book, *Relational Judaism* by Dr. Ron Wolfson in order to help us build upon our community's strengths by reimagining TBS community life through the lens of authentic relationship. Our Board of Trustees and Leadership Council had all read and reflected upon the central lessons of the text. As our **2020 Vision Initiative** leadership gathered to begin its work, it was natural to return to the pages of *Relational Judaism* in order to regain focus and find inspiration for our own community visioning.

2020 Vision Initiative Planning Committee

Peggy Lowenstein, Co-Chair

Jeffrey Shapiro, Co-Chair

Bernice Sue Behar

Marguerite Dowd

Harriet Goldin

Rachel Happel

Linda Hill

Rabbi Todd Markley

Rabbi Jay Perlman

Jeffrey Popkin

Judy Ravech

Seth Salinger

Jeffrey Samet

Lori Shaer



Dr. Wolfson's thesis is that "creating meaningful and successful Jewish communities in the 21st Century is about fostering deep relationships. It is about putting people before programs and understanding who they are. It is about how congregations might speak to the lives of its members. It is about helping people on their life journeys, and making Judaism a central and meaningful focus of that journey." At TBS, we embrace the concept of relational Judaism, believing that it is the cornerstone of how we should live as a community.

Over the course of the past nine months, the 2020 Vision Team met frequently to reflect upon and consider the strengths and opportunities for growth of Temple Beth Shalom as a "relational" Jewish community. Our goal, as we look toward the year 2020 (and beyond) was to create a visionary framework which would thoughtfully guide and inform our next steps towards becoming the kind of community that we aspire to be. Included amongst our ideals is our commitment to being a Jewish community where people are honored and embraced – where meaningful relationships are created and grow over a lifetime - where people of all ages grow through encounters with Jewish tradition, holiday celebration, cultural expression, age-old wisdom, and acts that improve society, as well as through encounters with each other. A "relational Jewish community" is one where people

extend themselves to assist others and find strength through the support of others. A "relational Jewish community" is inclusive of all – embracing each soul and celebrating our community's diversity. And finally, a "relational Jewish community" is one in which its members experience a spirit of belonging which is personal and meaningful – both for the individual and for the community as a whole.

Everything that we do as a Temple Beth Shalom community should help to foster this spirit. From services, classes, and programs for all ages...to the important tasks of community administration (communication, finance, maintenance)... to the development of leadership...all provide essential opportunities to deepen the soul of our community and support continued growth.

As our 2020 Vision Team approached our task, we asked a number of questions: What are the many constituencies that form our TBS community? What are our strengths in fostering a "relational community" for each of these groups of members and where are there gaps? How should we prioritize our approach to addressing "missing" elements or those needing improvement? And what type of administrative and financial infrastructure is needed to support our work – to move our congregation along our desired path? Our conversations were rich and thoughtful.



The TBS 2020 Vision Plan is comprised of four pillars that establish a vision and provide focus for our community over the next five to six years:

**PILLAR I:
Deepening Personal Connections**

Seeks to broaden and deepen the connection each member has with the greater TBS community. It is structured to encourage ongoing evaluation by leaders to ensure that we are continually creating meaningful Jewish opportunities (cultural, spiritual, learning, social, societal repair) for our members to meet, grow, connect and be supported through Jewish ‘encounters.’

**PILLAR II:
Creating Positive Change in the World**

Recommends taking the critical next steps in making TBS a vibrant center for social action and social justice, and in creating a meaningful environment for understanding and discussing issues relating to Israel.

**PILLAR III:
Strengthening the Operational Infrastructure for Our Evolving Community**

Recommends establishing an operational infrastructure that matches and supports our evolving community.

**PILLAR IV:
Achieving Financial Strength**

Requires us to continue developing the tools and leadership structures to ensure the long-term financial health of our community.

We did not limit our conversation to our planning group. We spoke with other lay leaders, clergy, and professional staff of TBS, and members of our community. As well, we conducted a comprehensive TBS community-wide survey. We also spoke with other leaders within the Greater Boston Jewish Community and studied the most recent decennial survey of the Greater Boston Jewish Community sponsored by Combined Jewish Philanthropies (CJP). Our resulting 2020 Vision Plan includes central pillars and detailed goals. It also provides flexibility, empowerment and ownership for those charged with shepherding it forward. We are blessed that we have a strong foundation from which to build, countless community members vested in visioning for the future, and a core of emerging leaders working toward our future successes. We welcome your participation, at any engagement level, to help us advance this plan.



TBS 2020 VISION INITIATIVE: PILLARS

The following details the four pillars established as part of the 2020 Vision Initiative. The overall goals associated with each pillar are highlighted, along with tactical steps required for successful implementation. We envision this plan as a community-wide effort. While the Board of Trustees will have primary oversight responsibility, lay leadership and staff will take ownership of each initiative by developing and implementing action plans and evaluating impact.

PILLAR I:

Deepening Personal Connections

Goals:

1. To be a community where members feel a deep and long-term connection to the congregation.
2. To create an environment that meets the needs of all members at each step of life's journey through impactful interaction with clergy, staff and other members.
3. To create programming that fosters meaningful relationships – within generational circles and across generations.
4. To be a home where everyone has a place “at the table” - where ideas are valued, where relationships among family members, between generations, and with friends, are paramount.

Implementation:

1. Begin development of programming to address gaps currently identified in engagement including an “Empty Nester” community program and enriched connections with our college age and young adult constituencies.
2. Establish a task force to explore additional programming gaps with the goal of developing and implementing a longer-term programming plan. Key elements to be considered include:
 - Identify “life journey” questions to be used by each member cohort when considering additional programming needs.
 - Create a broad culture amongst all leadership, professional and lay, of soliciting community input in programming planning.
 - Engage the TBS core communities (Sisterhood, Brotherhood, Garden Club, Teen, Three Score More or Less) and Committees to explore their own gaps and missing cohorts with a focus on how to address identified areas of improvement.





Develop Metrics to Measure Success:

1. As part of the program planning process, planners should document how each new or refined program seeks to build new or deepen existing relationships among the participants. Qualitative and quantitative metrics of success should be identified for each program and assessed periodically to measure success.
2. Review the congregational survey longitudinally to assess improvement on questions related to connectedness and community.
3. Additional measures for assessing success in programming include:
 - Number of members involved in at least one educational program, smaller community or committee and willingness to continue participation over a number of years.
 - Growth in individual program participation.
 - Greater numbers of congregants who are interested in contributing to the process of program development.
 - Willingness to recommend TBS to potential members.
4. Conduct selected conversations to determine the satisfaction with level of engagement, including all segments of the population including those who have limited involvement.



PILLAR II

PILLAR II:

Creating Positive Change in the World

Goals:

1. Effectively communicate our commitment to Tikkun Olam: create awareness, pride and energy in TBS social action endeavors, thereby inspiring increased participation.
2. Engage the various TBS constituencies, including Sisterhood, Brotherhood, Three Score and More or Less, K-12 learning programs, Children's Center and all TBS smaller communities and committees, in collaborative social action projects.
3. More deeply educate, engage and involve our TBS community in the work of social justice.
4. Strengthen the TBS community's understanding of Israel, including its history, culture and challenges.

Implementation:

1. Create inventory of current Tikkun Olam at TBS.
2. Develop a communications strategy that creates awareness of ongoing opportunities for involvement.
3. Formulate and implement a plan that establishes organizational priorities regarding social action and encourages greater levels of participation.
 - Deepen and expand working relationships with current service community partner organizations (Mozart School, Jewish Family & Children's Service Family Table, and Circle of Hope) through increased TBS involvement in current activities and through the introduction of new opportunities to participate.
 - Expand "Tikkun Olam Day" to more effectively encompass the entire TBS community including all students, their parents, and the various TBS Arms and smaller communities. Activities should reflect specific interests voiced by TBS constituencies and should encourage family and/or peer collaboration.
 - Consider using "Tikkun Olam Day" as a jumping off point for more extensive and ongoing social action in areas of newly identified interest.





4. Promote participation in the new TBS Tzedek initiative, moving the work of the Leadership team into the broader TBS community through effective communication and programming.

- Add new voices to the broader TBS social justice “conversation” to insure diversity of opinion and outlook.
- Develop two “action” groups: Immigration/Refugee Justice and 2) Jewish/Muslim Interfaith Relationship Building.
- Fulfill obligations to support Syrian refugee family in partnership with Temple Emanuel in Newton and engage in other immigrant/refugee humanitarian outreach.
- Deepen relationships and partnerships with other faith communities in the Greater Boston area.

5. Establish a new Israel Engagement Team charged with creating a community structure and ethic that allows for diversity of opinion and approach with respect to Israel.

- Better engage members of our community who have Israeli connections.
- Encourage participation in both TBS’ Passport to Israel program and in the Birthright program.
- Create programming furthering education, advocacy and engagement with Israel.
- Increase support for high school seniors as they take the next steps outside the world of TBS by offering more discussions and learning opportunities regarding Israel.
- Continue to provide opportunities for travel to experience Israel first-hand.

Develop Metrics to Measure Success:

1. Monitor opportunities for involvement in social action and social justice initiatives and track consistency of participation and increased levels of community involvement year over year:
 - Catalogue new events and activities which provide opportunities to think creatively and engage broad participation.
 - Become a recognized leader within the faith communities when it comes to matters of social justice.
 - Continue evolution as an organized and mobile community that responds to the call of social action and social justice issues and inventory efforts and successes in this regard.
 - Evolve into a community that leads for positive change locally and regionally, measuring involvement by tracking publicity of activities and good works in weekly bulletins, on social media and in newspapers.
2. Measure community satisfaction using questionnaires and interviews.
3. Encourage and track participation in Israel related travel, learning and advocacy.

PILLAR III:

Strengthening the Operational Infrastructure for Our Evolving Community

Goals:

1. Establish an outstanding operational infrastructure, including staffing and professional systems, that supports the vitality of our current community.
2. Create a mechanism of evaluating and prioritizing future infrastructure requirements providing support for a growing, evolving membership in a fiscally responsible manner.

Implementation:

1. Engage an outstanding senior administrative leader, within the next 12 months, tasked with implementing operational aspects of TBS life through the lens of the TBS mission.
2. Engage an outstanding Controller.
3. Determine the need for additional clergy and support staff over the next five years.
4. Ensure that the new Synagogue Management System is used to its fullest capacity.
5. Complete transition to Google non-profit on-line platform.
6. Centralize congregational communications to enhance sharing of information, membership engagement and marketing/PR.
7. As part of the annual budgetary process, create and review long-term infrastructure plan to ensure feasibility while maintaining the financial well-being of TBS. As described in Pillar IV, this should be a coordinated effort between Administrative staff, the Board of Trustees, and the Community Advancement and Finance Committees.



Develop Metrics to Measure Success:

1. Accomplish steps identified under implementation section.
2. Quantify improvement in operational efficiencies, development results, and program availability, and overall membership experience as the result of staffing changes and improved systems.
3. Successful onboarding of Controller and Executive Director of Administration.
4. Consistent and timely availability of relevant financial and management reports.
5. Qualitative assessment, using interviews and questionnaires, of congregant experience when interfacing with administrative functions.





PILLAR IV:

Achieving Financial Strength

PILLAR IV

Goals:

1. Appropriately design and implement a funding strategy that will ensure the long-term health of our institution.
2. Define and create a “culture of philanthropy.”
3. Diversify revenue sources exploring all alternatives, including endowment funding from individuals, family foundations and legacy gifts, available to supplement the current TBS funding model.
4. Continue to be a community where there are no financial barriers to membership or educational opportunities.

Implementation:

1. Create “Community Advancement Committee” tasked with:
 - Establishing a professional development structure at TBS involving a lay/staff partnership.
 - Developing required databases to support this advancement effort.
 - Maximizing current TBS development programs (Shofar Appeal, L’Chaim).
 - Increasing endowment giving.
 - Establishing a legacy/planned giving program.
 - Developing a long-term plan to address debt service requirements and repayment of mortgage.
 - Researching and determining the appropriate role for “Annual Member Commitment” (dues) in annual operating budget.
 - Fostering continued membership growth.

2. Create a task force comprised of administrative leadership and members of the Community Advancement and Finance Committees to:
 - Identify opportunities for greater financial efficiency at TBS on an ongoing basis.
 - Study future financial requirements to support implementation of the 2020 Vision Plan ensuring the following:
 - a) Adequate financing for currently identified infrastructure requirements.
 - b) Continued support for our quality educational programs.
 - c) Continued financial support for all members requiring assistance.
 - d) Funding for new programs recommended and prioritized as the result of implementation of Pillars I and II.

Develop Metrics to Measure Success:

1. Elimination of the mortgage, according to a schedule developed by the Community Advancement Committee.
2. Gradual reduction in the percentage of TBS expenses covered by dues and tuition with corresponding increase in endowment income available for operations.
3. Annual increases in endowment and levels of legacy gifts.
4. Track availability of funds to support staff additions, financial assistance and all types of programming.

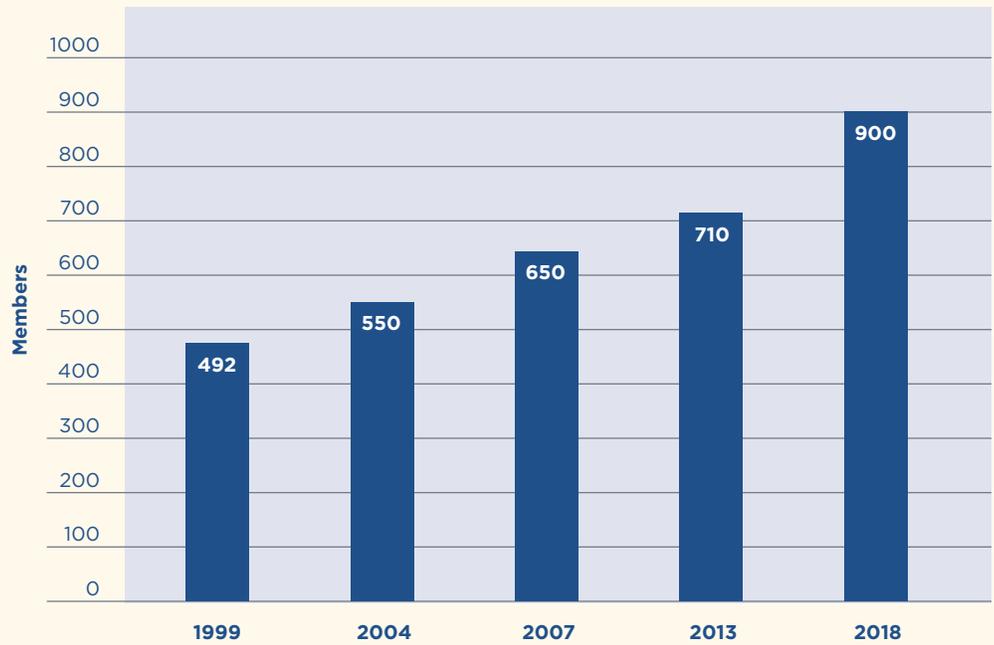
In Closing:

Temple Beth Shalom is blessed to be at an exciting time in our congregation's history. Our growth over the years reflects the depth of devotion of our members to creating a vibrant and meaningful Jewish community! Our [2020 Vision Strategic Plan](#) expresses our commitment to deepening the community experience at TBS; innovating in all that we do, and to planning for our future!

A Growing Community



TBS Membership



TBS Annual Operating Budget

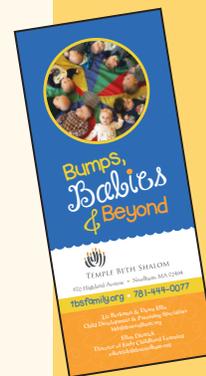
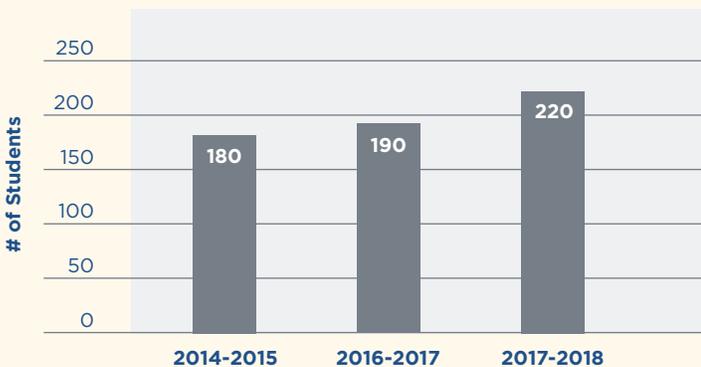




Enrollment K-12th Grade



Children's Center Enrollment



Plus!

Bumps, Babies & Beyond Program

*(Involving families with
0-3 year old children)*

237 households involved in 2017!





Our New and Expanded Temple Home Has Led to....

- Increased level of programming, services, and activities for all ages due to additional space
- Increased engagement by members of the community
- Inspirational and inviting space adding positive energy and enthusiasm to those who enter
- Double capacity for dinners, onegs, Bar/Bat Mitzvah Kiddushes, and evening celebrations
- TBS becoming a hub for programs/meetings/activities in the Jewish community and in the broader Needham community



TEMPLE BETH SHALOM
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