

congregation
Beth shalom
VISION **2020**

Strategic Vision & Plan

FINAL Committee Report

June 20, 2011

Northbrook, IL

Congregation Beth Shalom

Committee Mission

To articulate a vision for each CBS Key Strategic Segment and develop a blueprint that will guide our leaders towards a desired intermediate state (2015) and long term state (2020) for the greater CBS community.

Strategic Plan Guiding Principles

- All who enter CBS, member, guest, child or business partner are welcome.
- CBS is a safe, modern & comfortable place to gather.
- CBS is a recognized leader in the local community and broader Conservative Movement.
- CBS is a debt free organization with growing endowment resources.
- CBS is a strong & constant supporter of Israel.
- CBS, leaders, staff and members work together to reach common goals.

Membership

Current Situation – May 2011

- 1,280 household units; Aging membership with more than 75% currently over 50 years of age
- Young families are attracted to financial incentives – 20 families participated in the \$750 discount for child that enrolls in the Beth Shalom Hebrew School
- Absorption of Northwest Suburban Jewish Congregation members continues to be mutually beneficial – 130 households joined

2020 Objective

- Recruitment of Young Families will reach membership target of 40+% of members under 50 years of age
- Value of CBS membership is enhanced through responsible incentives for current members to retain their membership and for attracting new members to join CBS
- CBS to remain a community leader – welcome but do not solicit neighboring synagogue members

Critical Path

- Continue to develop, implement and evaluate an integrated CBS Marketing Plan
 - Religious School, Educational & Social Programming , Multi-Generational Families and Keruv
- Identify individual involvement level on the Member Engagement Continuum* and escalate participation
- Create a retention strategy driven by exit interviews and annual satisfaction surveys

*see Appendix

Ritual

Current Situation – May 2011

- CBS is the spiritual home to 1,280 households offering daily & holiday services, all life cycle ceremonies & life-long learning opportunities
- Full-time dedicated Clergy serve the synagogue; 2 Rabbis and 1 Cantor, each JTS Ordained and affiliated with their respective professional associations; Additional professional support from the fulltime Ritual Director
- CBS Ritual Committee provides oversight of ritual topics with the Senior Rabbi given final authority on ritual interpretation and observance practices

2020 Objective

- Religious services & life cycle events will evolve to reflect community needs and continue to be driven by an energetic welcoming spirit
- Full-time equivalent Clergy to Household ratio is targeted at approximately 1:400
- Daily morning & afternoon/evening minyan remain a valuable community benefit

Critical Path

- Develop a clergy succession plan with appropriate anticipated scenarios
- Require synagogue leaders (both professional and lay) to increase ritual service participation
- Invite continuous congregation feedback on current spiritual offerings & future opportunities
- Educate CBS membership on our spiritual offerings to increase their ritual participation

Finance

Current Situation - May 2011

- CBS is encumbered by 2 mortgages
 - Main synagogue building \$1,050,000 – annual P&I payments \$106,000
 - Parsonage at 3538 River Falls \$270,000 - annual P&I payments \$22,000
- In the last 11 years, revenues and expenses grew by 44%
- Membership dues make up 67% of income; salaries make up 67% of expenses

2020 Objective

- CBS is a debt free organization – capital projects are funded prior to expense incurred
- CBS builds the L'Dor v Dor Endowment Fund and creates additional endowment funds which feed the Annual Operating Budget in order to minimize increases to Membership Dues
- Alternative revenues (sources other than dues, fees & donations) contribute a minimum of 10% of the Annual Operating Budget in addition to Kol Nidre Appeal annual growth

Critical Path

- Immediately launch a focused and heavily publicized campaign to retire \$1.28 million mortgages
- Revitalize L'Dor v Dor Endowment Fund requesting CBS estate planning participation
- Develop sustainable alternative revenue sources
- Identify mid-term and long-term capital development projects & costs

School

Current Situation - May 2011

- Recent change to 2 day from 3 day religious school
- Family activities have been instituted as part of USCJ model plan
- New coordination efforts with youth, pre-school, and adult education programs
- Attendance is a challenge across all school classes and activities

2020 Objective

- School enrollment will grow every year over prior year
- Enrollment retention is achieved by graduating a minimum of 90% of entering Aleph students and having a minimum of 35% continuing to Hebrew High School
- Outstanding Judaic teachers are employed at all levels of student interaction
- CBS School is recognized for its excellence in Jewish education in the community and Conservative Movement

Critical Path

- Search and seat a motivated School Board with education and administrative experience
- Develop a reward/recognition system to encourage students' progressive grade completion
- Create a classroom experience to drive a compelling reason for active parental involvement and consistent student attendance
- Enhance the evaluation process for both teachers and curriculum

Youth

Current Situation – May 2011

- CBS USY participates in one of the strongest Regions
- Youth Group Membership is down nationally as well as at CBS 2007-2011; Youth Group dues option now included on school applications
- CBS has a history of being the source for Region and International USY Leadership
- The Harvey R. Gold Sefer Haftarah Fund has been established to supplement youth programming
- Youth is responsible for college student programming

2020 Objective

- USY Membership includes a minimum of 50% of age qualified CBS members
- Youth Commission is conscientious and supportive and facilitates setting and meeting clear goals & objectives for all of the groups
- Chapter programming fees are nominal to eliminate any cost barrier to participation

Critical Path

- Develop, execute and evaluate annually a Youth Engagement Plan including clear goals & objectives and program and staff diversity
- Identify and recruit qualified Youth Commission members
- Create ongoing database to identify CBS households with prospective youth members

Lay Leadership

Current Situation – May 2011

- Lay leaders surface from multiple areas without the benefit of a structured talent identification or skill development process
- CBS Bylaws have maximum continuous service limits for BOT Members and Officers
- CBS committees are generally the entry level for congregant involvement potentially leading to BOT participation

2020 Objective

- Potential lay leaders are identified early in their CBS affiliation and provided training/development opportunities via Conservative Movement and other leadership programs
- Young members are encouraged to take leadership positions and actively mentored
- Non-BOT households represent 20% - 50% of CBS committees' active members
- A minimum of 40% household participation rate on CBS standing or special committees

Critical Path

- Establish a program for current leaders and professional staff to identify and motivate members to become active
- Identify high potential lay leaders; provide development of all leaders
- Charge leaders with responsibility and accountability
- Ensure directions and workings of the boards as well as enabling leadership continuity

Professional Staff

Current Situation – May 2011

- CBS has 8 full-time Professional Staff under contract with Clergy on call 24 hours/7 Days
- Professional Staff has long tenure and multiple agreements expiring in 2013
- Nationally recognized clergy serves the CBS community
- Aging of membership and higher expectations of members require time management and prioritization

2020 Objective

- Professional Staff is locally & nationally recognized for leadership in the Conservative Movement
- CBS households receive spiritual, educational and emotional support from Professional Staff at progressive life stages
- CBS is regarded as a “Great Place to Work” among national Jewish professionals

Critical Path

- Develop a Professional Staff transition plan with target dates, compensation and identified recruiting activities (including parsonage requirements) consistent with the succession planning notebooks
- Create standard communications protocol for Staff to increase program awareness
- Define roles, responsibilities, prioritization and accountability to meet member needs
- Participate in professional development programs

Facility

Current Situation – May 2011

- CBS building is well maintained and experiences a few operating issues not uncommon for a facility of our age and size but space utilization does not meet current needs
- CBS parsonages are in good operating condition and well maintained
- Event catering is an underutilized revenue source
- CBS Main Sanctuary and Kitchen are displaying signs of extended wear and tear

2020 Objective

- Energy efficiencies and recycling/sustainability activities are maximized in building and parsonages
- CBS presents a welcoming experience through a contemporary Main Sanctuary and a full-service Kosher Kitchen for the community
- The building adequately accommodates the various programs and services available to our membership and provides the technology needed for safety, learning and business operations
- A minimum of 8 catering events are hosted annually

Critical Path

- Incorporate a mandatory energy efficiency analysis (new vs. current) with all purchase decisions
- Initiate design, cost and timeline for self-funded Main Sanctuary and Kitchen updating
- Conduct Facilities Usage Study to enable more flexible building design to accommodate potential growth and to provide comfortable areas for groups/meetings of various sizes
- Develop a technology update plan and timeline (sound, security, internet, computers, classrooms)

Programming

Current Situation – May 2011

- Congregation/Community programming is centered around Holidays/Shabbat, life cycle events, Israel and Adult Education with financial support from the CBS operating budget and program fees
- The Distinguished Speaker Program is funded by the EETP Endowment at fluctuating levels
- Young family programming through YFO and mature activities through Hazak
- Some events offered through the collaboration of multiple CBS arms and/or other Congregations
- Israel education and advocacy is offered in CBS classes and promoted through JUF and other community programs

2020 Objective

- The program and educational needs of congregants are met at each age/stage of life through creative programs
- The annual budget provides education program funding to eliminate any cost barrier to participation
- CBS is recognized for initiating joint activities with other synagogues and interfaith Houses of Worship

Critical Path

- Develop and implement a comprehensive marketing and communications strategy for programming
- Identify time & building space resources for increased classes & activities
- Analyze the structure of programming and education responsibilities to best utilize lay leaders, clergy, other professional and administrative staff

Social Action

Current Situation - May 2011

- Social Action projects are initiated and executed by individuals or small groups under the leadership of a Vice President
- Projects are focused on Jewish and global community outreach and material collections
- Lack of communication and coordination among arms of the synagogue regarding scheduling and publicizing of project opportunities & establishment/maintenance of a volunteer base

2020 Objective

- Social Action is a harmonized initiative across all arms of CBS
- Congregants are knowledgeable about Social Action opportunities and activity results
- Over 50% of CBS households participate in Social Action projects

Critical Path

- Develop and execute a comprehensive annual social action plan, master activity calendar & participation tracker, and CBS internal & greater community external communication strategy
- Expand activities to include other synagogues & interfaith organizations within our local community
- Establish an advisory role for professional staff in Social Action

Auxiliary

Current Situation – May 2011

- Long term leadership is uncertain
- Limited participation from new & young families
- Critical financial & service functions are served by the Sisterhood and Men's Club

2020 Objective

- Sisterhood & Men's Club membership at minimum of 50% of Congregation Membership and 100% of BOT
- Leadership Development Program is well established in the synagogue and is recognized as a benefit to identified current and potential leaders in Sisterhood & Men's Club
- Escalating recognition opportunities are established for service to CBS

Critical Path

- Incorporate Sisterhood & Men's Club dues into the synagogue annual membership statement
- Create and implement CBS Leadership Development Program with appropriately tailored curriculum
- Work with synagogue to create integrated marketing and communication plans

Administration

Current Situation – May 2011

- Organization is centralized with all office & maintenance staffs reporting to the Executive Director (14 employees)
- Feedback opportunities are limited – No formal process for staff evaluation and reviews
- Communications are independently managed – All under the guidance of the Executive Director

2020 Objective

- CBS runs an efficient & effective business administration with detailed roles & responsibilities determined by assignment and abilities
- Annual evaluations and succession plans are done for all administrative staff with input by Executive Board member
- Communications strategy across all media utilizes consistent branding

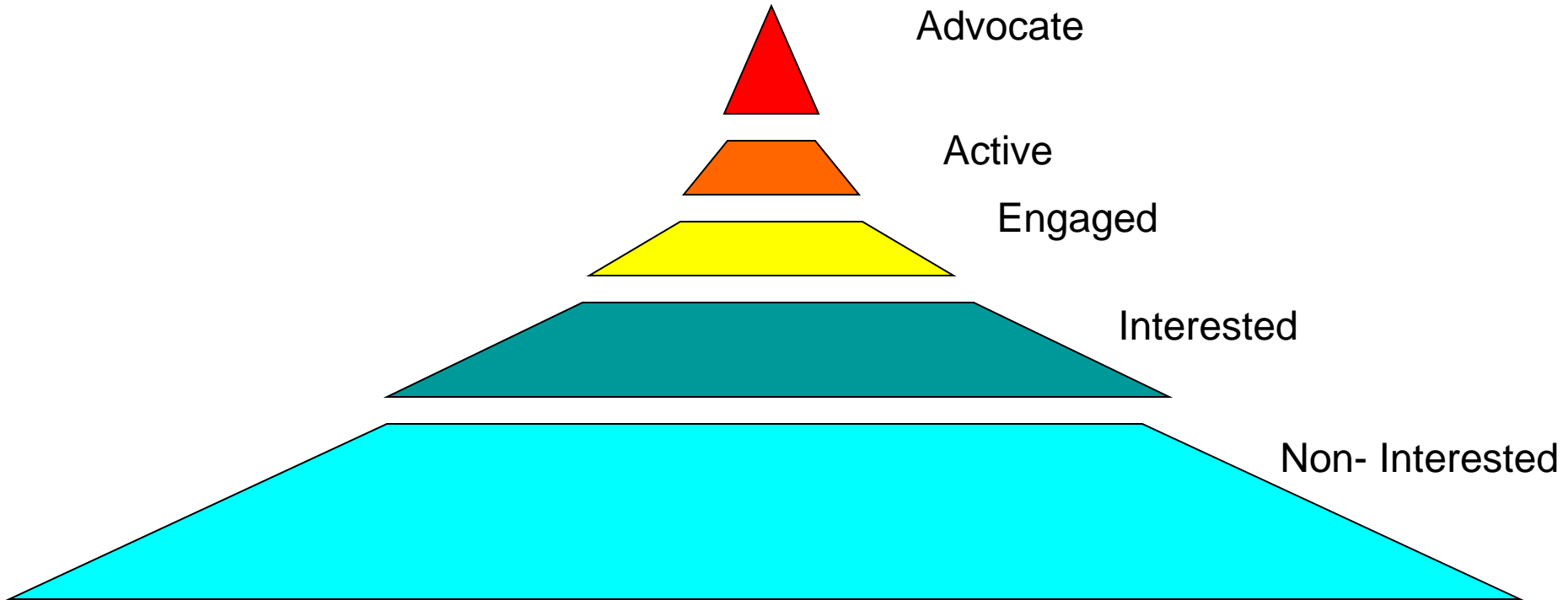
Critical Path

- Form an Administrative Committee under the position of the Administrative Secretary
- Develop an integrated communication strategy for web, bulletin, poster, social media, and print media
- Initiate financial controls
- Conduct written reviews of the administrative staff annually
- Update Executive Director and Employee handbooks annually

Appendix

- Engagement Continuum
- Strategic plan Scorecard

Member Engagement Continuum



Strategic Plan Scorecard

	Current	Vision	2015	2020
Membership				
Ritual				
Finance				
School				
Youth				
Lay Leadership				
Professional Staff				
Facility				
Programming				
Social Action				
Auxiliary				
Administration				