

The Long Range Planning Committee (“LRPC”) was formed in December 2009 for the purpose of creating a ten-year plan for Congregation Beth Shalom (“CBS”). Laura Shulman (“Shulman”) and Brian Miller (“Miller”), Immediate Past President, are the Co-Chair persons of the Committee. Arlen Lasinsky (“Lasinsky”) is the Plan Coordinator of the committee, whose primary responsibility is to coordinate the plan organization and documentation retrieved from each Segment Leader.

The name of the plan is “Vision 2020,” which was a play on words indicating perfect vision for our ten-year plan going out to the year 2020. The purpose of Vision 2020 was to guide CBS in its quest for continuous improvement and to meet the needs for the members of CBS. The ultimate goal is to make and continue to have CBS be the best conservative synagogue in every facet in the conservative movement. As described in more detail below, the collaborative effort by many made this possible. Note that the goals and recommendations in this plan are only goals and recommendations. It will be the responsibility of the Executive Committee and Board of Trustees to take the necessary steps to implement any or all of the goals and recommendations.

CBS last created a Long Range Planning Report in 1996. Although the report from 1996 contained a great deal of useful and pertinent information, the information in the report was not contemplated on an ongoing basis and consequently, the report was not used for its intended purpose over the last fourteen years.

Lily Zoberman (“Zoberman”), President of CBS since July 1, 2009, created the LRPC and assigned Shulman and Miller as the two Co-Chair persons. Miller and Shulman subsequently asked Lasinsky to join the LRPC as Plan Coordinator. The LRPC consisted of following segments and the individual assigned as the Leader for each segment:

Segment	Leader
Administration	Jill Olefsky
Auxiliary	Sara Weinstein
Facility	Howard Sigal
Youth	Lisa Krule
Finance	Glen Roter
Lay Leadership	Kevin Braude
Membership	Max Shaftal
Professional Staff	Michael Balter
Programming, Adult Education and Social Action	Jean Kosova
Ritual	Kim Shwachman
School	Jim Hamilton

The majority of the segments were supported by a committee to assist the Leader; however, there were a couple of segments that functioned by the Leader solely. There were more than 100 committee members involved in all of the segments.

The LRPC took several measures to obtain information from the members and professional staff of CBS to give the segment Leaders the ability to summarize issues and prepare goals and recommendations for their respective segments:

- An online survey was created so that members of CBS could respond to the questions on the survey. There were approximately 320 respondents to the survey.
- Four separate focus groups were conducted by the LRPC. The four focus groups resulted in approximately 50 CBS members participating in those focus groups.
- The Past Presidents' Council met with Zoberman and Miller at the beginning of the data gathering process to review goals and identify key reporting issues and strategy ideas.
- Approximately 62 Board of Trustees participated in small group sessions to convey ideas, suggestions and feedback to the LRPC. Many BOT members have contributed ideas to the LRPC over the entire process thru conversations with the co-chairs and/or committee members.
- Approximately 50 Board Members from the Sisterhood and Men's Club participated in discussions to convey their viewpoints with respect to issues and matters facing CBS in the next ten years.
- Because of the highest importance of this project, the entire professional staff was interviewed to gather their thoughts and comments. Some staff were interviewed by several different segment leaders.

Goals for each segment will be reported separately. Each of the detailed segment analyses and reports will be available to be used as a **tool** for the CBS Board of Trustees to consider how each goal and recommendation should be addressed in order to implement the necessary steps to reach those goals. The intent of this long range planning report is that it is to be a "living document," meaning that the content is intended to be changed as necessary to update information that may alter the original goals in the segments. The LRPC believes and recommends the segments should be reviewed and updated annually by the LRPC, a standing committee under the CBS President; preferably in the summer of the upcoming year so that each new board can review it during their annual board training. The LRPC further recommends that any new information that becomes available during any given year, prior to the annual update, should be the responsibility of the sitting President or Executive Director to have it incorporated in the plan. Finally, the LRPC believes that each goal be evaluated on an annual basis, perhaps more often, if necessary, to measure the results and progress for each goal.

Respectively submitted:  
Laura Shulman-Co-Chair  
Brian Miller-Co-Chair  
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