

STRATEGIC PLAN FOR TEMPLE ISRAEL GREENFIELD MA 2014, Rev. 2019

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Mission

Temple Israel will be the vibrant center of Jewish life in Franklin County.

Goals and Actions by Committee

This document comprises the mission of Temple Israel and the goals to be achieved to accomplish that mission. Each section is associated with a committee primarily responsible for it. Strategic goals are included in each section. The actions to achieve each goal are listed below, and associated with responsible committees when appropriate.

Actions are divided into **tasks** and **activities**. Tasks have defined products such as forms, procedures, or reports and generally have completion dates. Activities are ongoing efforts that may have start dates.

I. COMMUNICATIONS

Goal: The reach and effectiveness of Communications are extended.

Tasks

- 1. Action: Form a temporary Communications Workgroup (CWG) to find ways to make Communications more effective. Q1, 2019. OM, COM
- 2. Action: Analyze effectiveness of current practices, identify areas for improvement or expansion, and draft a Communications Plan for Board approval. Q2, 2019. CWG
- 3. Action: Review, modify, and approve a Communications Plan. Workgroup may become a committee or be replaced by a single board appointee. Q2, 2019. BOD, OM, COM

Activities

- 1. Action: Collect data for quarterly reviews of activity and effectiveness of email, website, social media and other channels as specified by plan. Q3, 2019 and following. COM
- 2. Action: Conduct quarterly reviews of communications and assess implementation of plan. Q4, 2019 and following OM, COM

Goal: Internal communications with members will be timely and conform to Temple policies.

Tasks

- 1. Action: Draft a non-technical communications handbook to inform the work of Temple volunteers and staff, including our procedures for reviewing messages before distribution. Q3, 2019. COM, OM
- 2. Action: Communicate with chairs and update board and committee and club member rosters on Temple website as part of semiannual meeting preparation. Q1, 2019 and following. COM, OM MEM
- 3. Action: Maintain and update phone tree for telephone notices coordinating with all committees Q1 20129 and continuing COM, OM

Goal: Manage public relations contacts and relationships to support publicizing Temple Israel's events and programs.

Activities

- 1. Action: Support all Temple committee with publicity. PR

Tasks

1. Action: Publicize TI including developing media contacts, use of social media, graphics for ads and posters Q1 2019 BOD, COM, MEM
2. Action: Develop a list of media contacts, including print and broadcast Q2 2019 PR
3. Action: Develop list of places to post TI announcements Q2 2019 PR

II. HEBREW SCHOOL

Goal: Grow the Hebrew School program to serve Temple families with young and school age children and attract new family members to the congregation, passing Jewish values to future generations.

Tasks

1. Action: Survey current members to determine their areas of interest and the needs of their children to aid in establishing a vibrant youth education program. Q1 2019 HS, R, MEM, COM
2. Action: Recruit pre-school parents to join the Education Committee. Q1 2019 HS, MEM
3. Action: Develop plan to work with PR Committee and MEM to reach non-members. Q2 2019 HS, MEM, PR
4. Action: Use survey results to assist in developing attractive and effective curriculum. Q2 2019 HS, R
5. Action: Determine staffing needs and alert/acquire staff (after budget approval). Q2 2019 HS, R, BOD

Activities

1. Action: Provide support, planning and oversight for the pre-school and school age programs. HS, R
2. Action: Provide age appropriate programming for families and children. Reflect these goals in budget and staffing plans. HS, R
3. Action: Develop budget and provide budget to BOD for approval Q2 annually HS, FIN

III. ADULT EDUCATION

Goal: Increase member interest, understanding, literacy and practice in Judaism and Jewish Culture.

Activities

1. Action: The Rabbi will offer a series of classes on a topic of his/her choosing at least 2X annually.
2. Action: A committee or committees will create and schedule educational programs annually after consultation and in coordination with the Rabbi, Programs, membership, other appropriate Temple committees and local allies when feasible.
3. Action: The Rabbi, Adult ed committee and anyone offering adult ed programs will coordinate with other TI events and programs to plan for the best use of time and resources.
6. Action: To ensure fiscal responsibility, monetary issues will be coordinated with Programs and the Temple treasurer. Attempt when possible to offset costs with fees to at minimum break even or at best generate income. Offer discounts and free classes to members.

Tasks

1. Action: Use the programming form, including deadlines, for efficient planning and promotion in order to increase registration levels.
2. Action: Assist the Office manager with publicity toward specific populations for maximum participation.
3. Action: Write up positive course outcomes for sharing in Temple newsletter to promote their value to membership.

Q3 2019 and continuing
AE, COM, PR

IV. FINANCE

Goal: Develop plans that provide abundant income to support our mission with income increasing from year to year.

Tasks

- | | |
|---|---|
| 1. Action: Develop and execute a marketing plan to support fundraising and facilities use. | Q3 2019 and following
PRG, FIN, OM, BU |
| 2. Action: Develop and implement plan to increase income from membership dues. | Q4 2019 FIN, OM, R,
MEM |
| 3. Action: Develop and implement a plan to retire the debt, fund special projects, and re-establish a Legacy Campaign | Q2 2019 FIN, INV |
| 4. Action: Develop a savings plan for contingencies and a prudent reserve. | Q2 2019 and following
FIN, INV, FDR |

Activities

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| 1. Action: Explore and pursue grant opportunities to support mission-related projects. | OM, FDR, PRG |
| 2. Action: Adopt annual budgets that will support the goals of the Strategic Plan. | FIN, BOD |
| 3. Action: Conduct a financial review by an independent CPA every 3-5 years. | BOD |

V. HOUSE

Goal: Maintain Temple facilities in a prudent and competent manner. Increase attractiveness of Temple Israel as a place to worship, meet, celebrate and learn.

Activities

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| 1. Action: Identify maintenance and aesthetic needs of the building and grounds. | HOU |
| 2. Action: Provide for access to and security of facilities (e.g. key control, alarm- setting authority), and periodically assess the need for increased security measures. | HOU |
| 3. Action: Identify legal and regulatory requirements for Temple and ensure compliance. | HOU |
| 4. Action: Identify reliable resources (contractors, etc.) to assist in maintenance and repair. | HOU |
| 5. Action: Provide oversight of the custodian and other workers for house and grounds. | HOU |
| 6. Action: Identify capital improvements to support and enhance Temple and provide a healthy and safe environment for our employees, members, and the community at large. FIN, HOU | HOU, FIN |
| 7. Action: Develop plans and estimates for capital improvements and present them to the Board during the annual budget process. | HOU, FIN |

VI. MANAGEMENT

Goal: Members of the Board of Directors perform their duties in a professional, responsible, trained and effective manner.

Tasks

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|---|---------------------------------------|
| 1. Action: Conduct annual training session for the Board, the content of which will be determined by the President(s) of the previous year. | EX Pres, BOD |
| 2. Action: Develop a list of skills and attributes which might be helpful for members of the Board, and periodically present the list for discussion at a congregational meeting. | Q2 2019 and following years
BOD |
| 3. Action: Hold an organizational meeting for the Board as early as possible after each Annual Meeting to allow old and new Board Members to discuss current and recent issues, expectations for Board Members, assignment of responsibilities, and other issues. | July 2019 and following years,
BOD |

Activities

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|---|-----|
| 1. Action: Conduct annual training session for the Board, the content of which will be determined by the President(s) of the previous year. | BOD |
|---|-----|

Goal: The Board is thoroughly knowledgeable about and integral to the workings of the Temple.

Activities

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| 1. Action: Assign Board member to serve as member or liaison to the Board for each committee and to be in close contact with the committee and be able to report to the Board on the committee's activities and needs. | Q1 2019 and continuing
BOD |
|--|-------------------------------|

Goal: The board will monitor and support implementation of the strategic plan

Tasks

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| 1. Action: Assign Board member as coordinator (SPC) for Strategic Plan Implementation to monitor progress on implementation. | Q1 2019 BOD |
| 2. Action: Develop matrix identifying actions for each committee and showing whether they have leading or support roles. | Q1 20019 SPC |

MANAGEMENT (Continued)

Activities

1. Board members assigned to committees will monitor progress made on Strategic Plan actions and assist, in particular in coordinating with other committees and seeking requisite support at the board level. Q2 2019 and continuing

Goal: Develop consistent means of communication between the Board of Directors, Rabbi and the Temple membership.

Tasks

1. Action: Create a Rabbinical Support Committee of 3-5 people including representatives from various segments of the congregation to meet on a regular basis with the Rabbi to give feedback and guidance. Q1 2019, BOD
2. Action: Include means to contact board member(s) in newsletter and on website. Q1 2019, COM, BOD

Activities

1. Action: Establish open line of communication between the Board and Rabbi. The Rabbi should attend Board meetings on a regular basis and open discussion of issues should be encouraged, as appropriate, both within and outside the Board meetings themselves. BOD, R

Goal: The Temple will have effective leadership.

1. Action: Establish a Leadership Development Committee to develop approaches to leadership recruitment, development, training and succession, such as organization of a Leadership Development Day or other events or trainings.

Goal: Committees will operate within parameters decided by the Board regarding expenditures and major activities so the Board can act responsibly in its oversight of the congregation's activities.

Tasks

1. Action: Set operating parameters for each committee in order to distinguish between activities which require Board approval and those which committees may carry out autonomously. Q2 2019 BOD

VII. PERSONNEL

Goal: Have an organized, professional and effective Personnel Committee.

Tasks

1. Action: Identify membership and responsibilities of the Personnel Committee and develop a committee handbook that includes a schedule of tasks and appropriate written materials. Q1 2019 BOD
2. Action: Identify areas where the Personnel Committee may need training and design method to provide this training. Q3 2019 PER, BOD
3. Action: Develop a schedule for performance reviews for all employees.

VIII.MEMBERSHIP

Goal: Increase membership levels to include the majority of the active and potentially active Jews in the region., satisfaction and participation.

Tasks

1. Action: Review, modify and maintain and distribute recruiting materials Q1 2019 and continuing MEM, OM
2. Action: Identify area locations, social groups and activities to find new members across all age groups. Q1 2019 MEM
3. Action: Develop means to locate Jewish families moving into or within TI region using real estate transaction and similar data. Q2 2019 MEM, PR

Activities

1. Action: Develop and share recruiting strategies in partnership with Programming, Ritual, PR, and Education committees. MEM, PRG, RIT, ED, PR, COM
2. Activity: Work with and support event planners to use events as recruiting tool. MEM, PRG, PR
3. Action: Identify and contact families using results from Tasks 3 and 1, including personal contact via phone or letter MEM, COM
4. Action: Identify and contact potential members in the 18-36 age group. MEM, COM, PR

Goal: Increase Temple Israel membership satisfaction and participation**Tasks**

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|--|-------------------------------|
| 1. Action: Develop and distribute member survey form with input from other committees to determine interests, talents (such as PR, graphics, finance, ritual, education, maintenance), and needs. Survey form should include several new potential areas of interest such as subjects to study, bridge club, book club, cooking club, arts and crafts, | Q2 2019 MEM, COM, AE |
| 2. Action: Develop protocol to ensure that new members will be contacted about activities and opportunities in the Temple. | Q2 2019 MEM, COM, OM |
| 3. Action: Identify potential committee or “club” members and forward names to relevant chairs | Q3 2019 and continuing
MEM |
| 4. Action: Develop list of “clubs” and other groups and potential members using Task 1 survey results | Q3 2019 and continuing
MEM |

MEMBERSHIP (Continued)**Activities**

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| 1. Action: Contact potential “club” members and foster “club” into existence | MEM, BU, OM |
| 2. Action: Use events, services, other gatherings to announce and recruit for “clubs” and programs | MEM, PRG, R |
| 3. Action: Analyze results of survey and forward names of candidates to committees and clubs. | MEM |

IX. PROGRAM

Goal: Provide a wide variety of programs for a diverse community that are welcoming, spirited and supportive to increase membership numbers, satisfaction and participation. Participation in activities and programs will increase annually.

Tasks

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| <ol style="list-style-type: none"> 1. Identify underserved and underrepresented members of segments of the Franklin County area Jewish community, such as young families, older singles, 18-36-year-olds and elders and means to reach them. 2. Work with MEM survey to determine what programs will attract attendance. | <p>Q3 2019 MEM,
PRG
Q2 2019, PRG
MEM</p> |
| <ol style="list-style-type: none"> 1. Action: Identify and contact other nonprofit organizations to determine feasibility of co-sponsoring events to reach their members and support cross-fertilization between communities. 2. Action: Develop high-interest programs which introduce courses and will entice adults to enroll in them; in cooperation with Program Committee. | |

Activities

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|---|---|
| <ol style="list-style-type: none"> 1. Action: Schedule varied activities, including social events around food, art, music, entertainment, and discussion. Coordinate with MEM and AE 2. Action: Encourage committee heads to utilize the planning form developed for Temple events for efficient planning and promotion. Assist the Office manager with publicity toward specific populations for maximum participation. 3. Action: Engage members and program attendees by letter, email and phone to invite to attend or work on a specific program/event. 4. Action: Determine which programs will increase connections with underserved and underrepresented members of segments of the Franklin County area Jewish community, such as young families, older singles, 18-36-year-olds and elders, and schedule such programs. 5. Action: Publicize events through regular media, social media, targeted email list, temple bulletin, and other media as appropriate. 6. Action: Include exit polling, written or verbal to help determine what was positive or negative about an event. 7. Action: Write up positive outcomes for sharing in Temple newsletter to promote their value to membership. 8. Action: Attempt when possible to offset costs with fees to at minimum break even or at best generate income. Offer discounts and free classes to members. | <p>PRG, AE, MEM
PRG
PRG, MEM,
COM
PRG, MEM
PRG, PR, COM</p> |
|---|---|

PROGRAM (Continued)

Goal: Increase connection, social interaction and understanding between members and non-members, Jews and non-Jews.

Tasks

1. Action: Identify and contact other nonprofit organizations to determine feasibility of co-sponsoring events to reach their members and support cross-fertilization between communities. Q3 2019 AE, PRG
2. Action: Develop high-interest programs which introduce courses and will entice adults to enroll in them; in cooperation with Program Committee Q2 2019 and following AE, PRG, R

Activities

1. Action: Encourage program and course leaders to include social learning activities and to provide time and food for socialization during breaks and after endings, when appropriate. AE, PRG

X. SOCIAL ACTION/SOCIAL JUSTICE

Goal: Be a valued and respected contributor to the larger community.

Activities

1. Action: Maintain participation in faith-based coalitions like Interfaith Council of Franklin County and the Jewish Federation of Western MA SA, R
2. Action: Initiate and maintain direct donations to Community Meals Program, NuDay Syria, Family Inn, and other mission aligned organizations. SA
3. Action: Support allied organizations by hosting events at the Temple to support their work with approval of BOD. SA, SJ, BU, BOD
4. Action: Prepare bi-monthly lunch for Community Action Family Services bilingual playgroup and prepare and serve a community meal at the Second Congregational Church twice a year. SA

Goal: Increase the Temple's standing and visibility in the community.

Activities

1. Action: Build on connections to allied community organizations, events and businesses. SJ, R
2. Action: The Social Action Committee and the Refugee Support Group will expand opportunities to collaborate with community-wide activities that promote tikkun olam (repair of the world). SA, SJ, BOD, R
3. Action: Develop new activities to increase the welfare of the Jewish community and the larger community in the region. SA, R
4. Action: Ensure Temple activities are announced and covered in media. PR, COM
5. Action: Identify and pursue opportunities to represent TI as a respected source of social justice and related issue commentary in media. SJ, R, BOD

XI. SPIRITUAL

Goal: Provide vibrant opportunities in spiritual growth for a diverse community with an increase in participation over the baseline year.

Activities

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|---|--------|
| 1. Action: Maintain a rabbinical presence to help realize the organizational goals that are being developed. | R |
| 2. Action: Continue connecting members with others holding similar spiritual feelings or interests, based on the tradition of study pairs, or khevrutah, to build community and connection. | R, RIT |
| 3. Action: Rabbi will lead regular Shabbat and Holy Day worship services, Shabbat afternoon presentations, study sessions or other events to teach spiritual texts and topics. | R, RIT |
| 4. Action: Develop and implement plan to improve the participation in, and quality of, potlucks and onegs/kiddushim. | R, RIT |
| 5. Rabbi will be empowered to offer services and other programs or events at different times and places that appeal to a broader group of people | R |

Goal: The Rabbi will show strong spiritual leadership, and counsel, mentor, and empowering congregants to take leadership roles in the congregation.

Tasks

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| 1. Action: Develop a plan to meet the needs of congregation members experiencing illness, bereavement, celebration, and other situations which may call for comfort and assistance. | Q2 2019 R, RIT, MEM |
|---|---------------------|

Activities

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|--|--------|
| 1. Action: Schedule styles of services in accordance with congregants' interests and noted and described in the bulletin and on the website, so people understand what is offered. R + | R, RIT |
| 2. Action: Identify congregants with ability/ interest to lead services, chant Torah and otherwise participate in spiritual and educational activities and assist in their development as future leaders coordinating with MEM | MEM, R |
| 3. Action: Rabbi will be part of events or programs to provide spiritual/ traditional insight and teaching to Jews and non-Jews who are part of the Temple or wider communities, building connections between social and spiritual activities. | R, PRG |

SPIRITUAL (Continued)

R

4. Action: The Rabbi will provide counseling or assistance in finding qualified counselors to congregants, as needed and appropriate.
5. Action: The Rabbi will maintain communication with the Chevrah Kadisha, consulting and advising as needed. R

APPENDIX 1: OFFICERS, COMMITTEES AND ABBREVIATIONS

ABBREV	TITLE & MISSION
STAFF	PAID POSITIONS
R	Rabbi
OM	Office Manager
AC	Accountant
CU	Custodian
BOD	BOARD OF DIRECTORS
COM	COMMUNICATIONS
CWG	Communications Working Group: oversight for website, email, social media and printed material.
PR	Public Relations (a subset of Communications)
EDU	EDUCATION
HS	Hebrew School: Planning and oversight of K-6 education programs for Temple members.
TE	Teen Program: Programming for 6-12th graders in the Temple and larger community.
AE	Adult Education: Programming for adults in the Temple and larger community.
FIN	FINANCE
FIN	Financial: Develops budget each year, oversees use of money, brings financial needs to board.
INV	Investment: Oversees Temple investments and use of its funds in appropriate manner; maintenance of endowment funds.
FDR	Fundraising: Plans fundraising efforts such as large one-time programs, ad-selling and production of Blue Book.
HOU	HOUSE
HOU	House: Oversees maintenance of building and grounds, obtaining necessary funding or approval for such projects.
MGT	MANAGEMENT
PRS	Personnel: Oversees contracts, goal-setting & evaluations, communication with employees.
BU	Building Use: Provide contact person for anyone using the Temple for programs other than the religious school and rituals; oversee contracts for appropriate uses
AE	Aesthetics: Screens offers of donated objects such as furniture, toys, framed art
GN	Garden: Organizes garden planning and maintenance.
MEM	MEMBERSHIP

MEM	Membership: Seeks new members, encourages application, guides application process. Make the Temple an attractive, welcoming place and a welcoming community
GW	Good & Welfare (Gemilus Khesed/Gemilut Khasadim): Sends cards to the ill, coordinates help with food contributions for the ill or bereaved
PRG	PROGRAM
PRG	Program: Develops programs for adults serving a wide range of interests and formats.
SOC	SOCIAL ACTION
SOC	Social Action: Carries out planning for community meals and other social action programs
RS	Refugee Support Project: Raise awareness and aid for Syrian and other refugees.
SPI	SPIRITUAL
RI	Ritual: Works with rabbi to plan services and holiday celebrations and to make policy on matters with religious significance.