

# EXECUTIVE SUMMARY

## Temple Rodef Shalom

### 2007 Strategic Plan

Temple Rodef Shalom (TRS) has reached a milestone, surpassing in size all the other Jewish congregations in Virginia. Growth without vibrancy however, is a burden and a hardship. But TRS continues to please most members. As one congregant so aptly portrayed the Temple, “My mother-in-law was a member of a very old, ‘dead’ temple in New Jersey. She cried [with pleasure] at her first service with us when she saw a female rabbi, a young girl blowing the shofar, children happily running about, and an overflowing and lively congregation.”<sup>1</sup> Such vibrant growth spurred the Temple to begin a new long range planning cycle.

In 2002, Temple Rodef Shalom promulgated a comprehensive Strategic Plan embracing the Temple’s *mission* and consisting of seven (7) *goals*. Preparing the plan was a 2 year process consisting of interviews of clergy, officers, senior staff and committee chairs; drafting, implementing and analyzing a survey of the congregation, and holding congregational forums on key issues. The goals were distilled and prioritized from the gathered information, the *objectives* highlighted sub-themes for each goal, and the many creative ideas suggested by the people with whom we spoke, were organized by goal into concrete *action items*.<sup>2</sup>

Gratefully, the 2002 planning process revealed that most members were quite pleased with TRS overall and what it offered its members. But the input we received also indicated that measures could be taken to increase congregational satisfaction.

In 2002, four goals were directed to the congregation at large: the sense of welcome, spirituality, outreach, and youth and adult education. Three were governance oriented: financial dependence on dues, volunteerism, and the administration of the Temple.

Even before the promulgation of the Plan in 2002, however, the Temple, its clergy and lay leaders, were working toward and anticipating certain goals; a new part-time Youth Director had been hired and the B’nai Mitzvah program had been revised. The Temple also underwent administrative transition during this period: our long time administrator, Judy Seiff, announced her retirement and Beth Silver, a congregant and officer, was hired in 2004 as the Executive Director. And of course, the renovation of the Temple building was the major project at that time. The Temple congregation had 1050 families in 2000 as the Long Range Planning Committee began work on what was to become the 2002 Plan. We were bursting at the seams both literally and in anticipation of the new renovation.

The purpose of the 2002 Strategic Plan was to assist the clergy, Board, staff and committee chairs to pursue their work using common themes and to move forward in common directions. After the Plan was adopted, these groups met periodically, specifically to use the goals to plan and to review progress toward the goals. For example, the Committee facilitated workshops with the committee chairs each year to help them focus on the goals during their planning; the job descriptions for the staff

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<sup>1</sup> Unless otherwise indicated, quotes throughout are from comments made by congregants in the 2006 survey.

<sup>2</sup> These Action Items can be found in Appendix M.

were revised to exercise the goals; and the clergy used the goals in their planning retreats. Much progress was made toward the 2002 Goals; however, many opportunities remain to reach these goals.<sup>3</sup>

Five years after the first interview for the Strategic Plan, the Committee began the planning process once again of interviewing and soliciting feedback from the clergy, committee chairs, officers, senior staff and the congregation. Under the guidance of Andy Joskow, a demographic study was undertaken in 2005 to determine our growth rate. The report projected 1600 congregational families in the year 2010. Similar to the 2002 Plan, the Committee found that most members are quite pleased with TRS overall and the programs and services it offers its members. The aspects of the Temple that were identified as very important and of high quality remain so: the clergy, the High Holy Days and the musical elements of the service. Two areas, the youth B'nai Mitzvah program and the Temple staff were also identified in 2006 as important and now of high quality.

However, certain recurring areas were identified by clergy, staff and the Congregation as important to focus upon: youth education and youth group activities, financial dependence upon dues, interfaith issues and outreach, the size and ability of the congregation to welcome each member, our growth and the capacity of our present clergy to minister to our growing congregation – when would a fourth clergy be required? Other issues, such as bema accessibility, a small chapel, parking shortage, a perceived dearth of volunteers and whether we should “burn the mortgage” also were included in our lay leaders’ list of important priorities.

Even as the information was being gathered by the Committee, we were experiencing further transitions: our long time Nursery School Director, Karen Simpson, retired as did our part-time Youth Director, Michelle Sandler. The following positions were also vacated and all but one immediately refilled: Religious School Principal, two Religious School Assistant Principals, Temple Office Manager, and the (outsourced) Head of the Custodial Staff. The broader position of Educator was created and filled in early 2007. Karen Simpson also transitioned the directorship of the TRS Camp to Jay Rapoport in 2002. Our student Cantor, Lee Korn, graduated, took a pulpit in California, and a new student, Rebecca Robbins, took his place. New faces have generated new energy, new ideas and excitement, and work was proceeding apace in many areas. For example, led by Rabbi Schwartzman, our Religious School is embarking upon a year-long process laying the foundation for new and creative learning models for our children.

Melding Goal 5 (to achieve financial stability not wholly dependent upon dues), and Goal 1 (a warm and welcome community), TRS began a search for a Director of Membership Development, who would both enhance the culture of giving at TRS and be a cohesive, welcoming force among congregants. Although some temporary steps were taken to address the issue of accessibility with the installation of a lift on the bema and in the multipurpose room, we have not yet completed our work in this area.<sup>4</sup>

And another transition was being planned; it was time for our beloved Associate Rabbi, Rabbi Burstein to move on in his career. So a search committee was formed to look for his replacement.

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<sup>3</sup> See a list of Efforts to Reach 2002 Goals in Appendix I and a list of Areas of Opportunities for 2007 Goals in Appendix J.

<sup>4</sup> See *The TRS Pursuit of Inclusion – Bema Accessibility and Sanctuary Enhancements*, TRS Bulletin, March 2007 p.7, Appendix N

Lastly, both Rabbi Schwartzman and Cantor Shochet took sabbaticals during this time to reenergize themselves, spend more time with family and pursue further learning and life experiences. During Rabbi Schwartzman's sabbatical, Rabbi Shire from the United Kingdom assisted our Congregation in teaching and leading services.

### 2007 Goals

The more things change, the more they stay the same. Three of the four congregational goals remain as top priorities in the 2007 plan: 1) a sense of welcome, 2) youth education and Jewish identity, and 3) interfaith issues and outreach. The newest goal – a focus on our growth – warrants thoughtful study in the upcoming years. Our congregation is concerned and needs to be reassured that the leadership has a plan for long term growth. Almost all agree that an artificial cap on the size of the congregation is not a healthy approach. After all, if TRS had capped its growth when the identical issue was raised over the years, most of the people now concerned about our size would not be members of our congregation. Sixty-three percent of the Congregation joined the Temple since 1990. Growth is not just a problem of welcoming congregants. It manifests itself in our physical facility, our parking problems and the ability of our clergy to minister to the congregation. Yet growth also has a beneficial face: a wide variety of programs, a vibrant community, “something for everyone”, and a strong financial foundation. The challenge in the upcoming years will be to manage our growth, continue the aspects of our Temple that draw the congregants to Rodef Shalom, and ensure our sacred community years into the future.

These are the 2007 Goals (Not in any priority order):

1. Continue to Develop a Sense of Welcome in the Congregation.
2. Plan for Growth and Maximize Opportunities Within our Large, Vibrant Congregation.
3. Increase and Develop Children's Sense of Community, Positive Jewish Identity, and Educational Opportunities.
4. Continue to Enrich Educational and Spiritual Opportunities for the Congregation.
5. Continue Outreach to Intermarried Families and Education of the Congregation Regarding Inter-marriage Issues.
6. Strive for Long Term Financial Stability Not Wholly Dependant Upon Dues.
7. Optimize Governance, Committee Coordination and Member Participation.

This strategic plan again is intended to be a tool to enable the entire Temple community to “row together” in the same direction. As we move further into the 21<sup>st</sup> Century, it is the Committee's hope that our next congregational assessment will again reflect all our love for, and work on behalf of this extraordinary sacred Jewish community.

# Temple Rodef Shalom

## 2007 Strategic Plan

### I. Introduction

The vision of Temple Rodef Shalom as *Kehilla Kedosha* – Sacred Community – was established nearly a decade ago by Rabbi Schwartzman and adopted by the Board of Directors, articulated this way:

*Together we strive to build a sacred community unified by common goals and ideals, where all members are embraced and Jewish traditions are observed.*

Kehilla Kedosha established a mission for the Temple, both spiritual and practical. But how were we to build without a plan? How were we to unify without exploring common goals and ideas? How were we to embrace members without understanding their perceptions, attitudes and needs? In the year 2000, a highly participative strategic planning process was begun involving the clergy, the officers, committee chairs, the staff and the congregants. The process involved establishing demographic benchmarks, one-on-one interviews with clergy and staff, special topic forums, and a statistically valid quantitative survey of congregants on a wide range of issues. The 2002 resulting Strategic Plan has been a guiding force for many decisions, directions, and programs at Temple Rodef Shalom. To ensure that the Strategic Plan continued to be a relevant, living document, one of its recommendations called for re-evaluation and the development of a new Strategic Plan five years hence.

The work to develop the 2007 Strategic Plan for Temple Rodef Shalom began over a year ago by the Long Range Planning Committee. The process drew upon new demographic reports, as well as focus groups run by the Religious School Committee, a survey about services and another survey of the entire congregation.

In the following pages, you'll find background on the history of our Temple and the process, rationale and recommendations of the new Strategic Plan. Attached as addenda is a wealth of demographic and historic material, a comparison of the 2002 and 2007 goals, "action items", and more detailed information on the 2000 and 2006 surveys.

Perhaps the most important section in this plan is the discussion of the seven goals that synthesize the Long Range Planning Committee's research and recommendations. These goals refine the seven goals established in the 2002 Strategic Plan and will now become the cornerstones by which the Temple Rodef Shalom clergy, staff, and congregation continue the journey together toward *Kehilla Kedosha*.

### II. Background

Temple Rodef Shalom in Hebrew means "pursuing peace". It was the first reform Jewish congregation in Fairfax County, splitting off from Temple Beth El of Alexandria in 1962. The Temple

is a member of the Union of Reform Judaism and was led for over 35 years by its first rabbi, Lazlo Berkowits. In 1970 the Congregation dedicated the building on Westmoreland Street. In 1980, the Congregation consisted of 435 families. Ten years later it had 660 families. By 2000, the Congregation was 1,100 families and continuing to grow steadily. Presently, the Congregation consists of almost 1,400 families.

In 1998, Rabbi Berkowits took emeritus status and the Temple's Associate Rabbi, Amy Schwartzman (who has been with the Congregation since 1990), became the Congregation's Senior Rabbi. In 1998, the Congregation also hired its first Cantor, Michael Shochet, and a year later it hired a new Assistant Rabbi, Marcus Burstein. At the same time, the congregation was close to achieving its previous long range goal of building an enlarged facility to accommodate the growing Congregation and its needs. Then, having met the goals of augmenting clergy and physical facility, TRS turned its attention to determining strategic direction to ensure that the needs of the growing Congregation continued to be met. The Long Range Planning Committee was tasked in 2000 with coordinating this effort and produced the 2002 Strategic Plan (Attached as Appendix K). The Committee continued to monitor and assess the 2002 Plan and began the strategic planning process anew in 2004.

A. Vision and Mission

Rabbi Schwartzman articulated a vision or mission for TRS when she became its senior rabbi in 1998, and this vision and mission was adopted by the Board of Directors at a retreat in the Spring, 1998. Adherence to and promotion of this vision and mission has been a guiding force in gathering information for this plan, formulating the survey and in the manner in which the Committee has proceeded. The vision of our temple is *Kehilla Kedosha* ("Sacred Community"). It has guided our Temple and the long range planning process and is set forth as follows:

*"Together we strive to build a sacred community unified by common goals and ideals, where all members are embraced and Jewish traditions are honored."*

B. Strategic Planning Process

The Committee determined that the 2002 Plan had been a successful planning tool and the process by which that Plan was developed, had been effective. In addition, the Committee was eager to re-survey the Congregation to measure progress since the 2002 Plan and to answer the question: Had the work of the last 5 years borne fruit?

*Scope and Nature of Process*

To obtain as much input from the TRS Community as possible, and ensure that all voices would be heard, the Long Range Planning Committee again involved the clergy, the professional and administrative staff, the Committee Chairs, officers and the Congregation.

First, the Committee interviewed the clergy, senior staff and a majority of committee chairs. Next, written input was gathered from all the committee chairs.

Then, in June, 2006, the Committee conducted a survey of all TRS members patterned on the 2000 survey so that the results could be compared<sup>5</sup>. This time, however, 5 years of technological advancement made a world of difference in the administration and analysis of the survey. With the assistance of James Mendelsohn, a congregant with extensive survey experience, the Committee drafted a survey, launched it on line, and monitored the anonymous results at various points to determine whether responses were being received from a representative sample. Results could be tabulated instantly (eliminating the laborious data entry and analysis of the previous survey). The results were remarkably consistent each time the data was reviewed during the survey period. This consistency and a comparison of current members to survey participants indicates that a representative sample had been achieved. However a somewhat smaller number of congregants (716 in 2006 vs. 900 in 2000) and lower percentage (28% in 2006 vs. 45% in 2000) responded. A separate report of the survey is included in Appendix D and E, a quick comparison between the 2000 and 2006 surveys is found in Appendix F, and the 2006 survey results are discussed in Paragraph D, below.

### *Forums and Additional Surveys*

A series of forums were held during the 2000-2002 planning cycle to address three important areas: enhancing the sense of community, spirituality, help with significant life issues, and interfaith issues.

In the current cycle, a survey on youth education was initiated by the clergy as well as a survey on alternative worship opportunities. A forum on education was also held at the Temple during one Tuesday and two Sunday sessions of Religious School.

Since the 2000 plan, three additional services had been added: *Boi Shabbat* (the “welcome Shabbat”), Shabbat afternoon *Mincha* service, and the Service of Strength, Comfort and Healing. In the fall of 2005 the Clergy decided to experiment with the number, format and timing of *all* the services to determine whether these changes would better meet the needs of the Congregation. After 9 months, a survey was taken which indicated that a similar number of congregants loved as disliked the new formats and times, and attendance did not warrant significant changes. However, in response to comments, Friday night services were moved 15 minutes earlier – to 8PM - and a Tot Shabbat Activity was added to the schedule for one Saturday morning per month. Clearly the expansion and variety of services are supported by the Congregation and indicate our striving to meet the spirituality Goal of the Congregation.

The three forums on education were only attended by a total of 40 people. However, the issues discussed were important: the flexibility of the educational program, the quality of the teachers, communication and the curriculum. A wide variety of opinions were expressed, but valuable suggestions were made and “out of the box” ideas generated.

### C. Membership Demographics

The last demographic study of the congregation was in 1999. So Andrew Joskow, a congregant with extensive forecasting experience was asked in 2005 to update the membership statistics for the Temple and forecast the growth of the Congregation. (See report at Appendix A).

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<sup>5</sup> The 2000 Survey questions can be found in Appendix L and the 2006 Survey questions, in Appendix D.

From 36 families at its inception in 1962, TRS has grown to 1,375 families today. In each year, membership has increased by roughly 50 families, except in 2003 when a large number of members were purged as a “catch up” because they were no longer paying dues or attending High Holy Day services and had no children in the Religious School.

During 1970-1990, Temple growth roughly paralleled population increases in Fairfax County: TRS 5.7%, Fairfax 4.4%. During the years 1990 to 2005, however, TRS has continued to grow at 4.4% while the Fairfax County growth rate has decreased to 1.6%. Why has TRS continued to grow? Andy Joskow surmises that TRS is tracking a Jewish population increase in Northern Virginia (see chart 4 in Appendix A). Using this historical information and data (and adjusting for the 2003 “purge”), Andy projects that TRS will have at least 1,600 families by 2010, an increase of 300 families in 5½ years.

Additional demographic information was culled from the 2000 and 2006 survey data. For example, the number of intermarried<sup>6</sup> families and their percentage of the congregation has continued to grow. Currently, approximately 31% of the total congregation and 33% of its married members are intermarried families. 30% of new families joining TRS in the last 2 years have been intermarried families.<sup>7</sup>

The age of the typical member has remained steady over the last 5 years: 51 years of age in 2000 and 53 years in 2006 (not a statistically significant difference). And the percentage of our congregant’s children who are in the age range for nursery school and religious school respectively, matches the percentage of the children who attend these schools, indicating that these schools draw the maximum potential students from the congregation. Current membership demographic details can be found in Appendix B.

#### D. 2006 Congregation Survey Results

Both the 2000 and 2006 Congregational surveys focused upon only two questions: the importance of aspects of the Temple to the respondent, personally, and the perceived quality of those aspects. The aspects measured ran the gamut of temple life – from the Clergy, to the location of the building, from the music in the service, to the youth programs.

The respondents to the 2006 survey again revealed a variety of strengths, opportunities and challenges to be considered by the Temple. Overall, members were again satisfied with their experiences at TRS. 90% indicated that they were either “satisfied”, “very satisfied” or “extremely satisfied”; 9% were “not very satisfied”; and 1% indicated they were “not at all satisfied”. 92% stated that they were likely to stay at TRS in the next year assuming they did not move out of the area. On average, no areas were rated, as a group, as “poor” in either importance or quality.

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<sup>6</sup> “Interfaith” families are those in which the two heads of the household actively practice different religions. “Intermarried” is the coined term to distinguish a family in which the two adults are of different religious backgrounds, but only one religion is currently practiced. In this report we refer to both types of families as “intermarried”.

<sup>7</sup>It appears that the percentage of interfaith families may have been overstated in 2000.

The areas rated highest – high in importance and high in quality – were the following:

- B'nai Mitzvah
- Crises Support
- Clergy
- High Holy Days
- Life Cycle Events
- Music in the Service

A few areas were rated as being of high importance to the respondents personally, and likely to benefit from additional focus:

- Sense of Welcome
- Size of Congregation
- Youth Activities and Education
- Interfaith Issues and Programs
- Religious School

Here is a flavor of the overwhelmingly positive comments:<sup>8</sup> “The Temple has been a true gift in my life.” I am “deeply grateful”. “TRS is a joyful and enriching experience”. “We have amazing Clergy, staff and volunteers”. “It’s a great place; I’ve never felt so connected to Judaism!” “I have been a member for 26 years, and TRS has just gotten better and better!”

Here is a flavor of constructive comments: “I hope as you bring in new clergy and staff, that they keep the same open attitudes as the current clergy.” “I think folks need to hear [the Rabbis’] views on interfaith marriages.” “As long-time TRS members, we find ourselves bemoaning the size of the congregation.” “While I think the clergy are all great, I get the impression that they are all overburdened.”

Because the Committee asked similar questions in the 2000 and 2006 survey it was able to compare the results of the two surveys. Appendix F is a chart that compares salient questions in each survey. Appendix G is a scatter plot indicating the importance and quality of aspects of the Temple in 2000. Appendix H is the same scatter plot from the 2006 survey.

As in the previous survey, members rated all aspects, on average, as satisfactory or above. And the relative importance of most aspects to congregants in 2000 were similarly reported in 2006. With the addition of the B'nai Mitzvah program in 2006, the “excellent” aspects remained the same: Clergy, High Holy Days, Music in Service, Nursery School. The top areas of focus that recurred in 2006 were: Youth Activities, Interfaith Issues and Programs. Added to this list in 2006 were Religious School, Size of Congregation, and Sense of Welcome.

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<sup>8</sup> 82% of those who answered the survey responded to the open ended questions. In response to the request to list 3 aspects of the Temple they liked, Congregants poured forth praise. While not all the answers to the “3 things you would like to change” question were positive, the comments were an inspiration to read. They were thoughtful, from the “heart,” and provided many constructive suggestions. The Committee thanks all those who responded to the survey and the many who gave us their thoughts. The Committee has communicated and will continue to communicate the comments on an anonymous basis, to the appropriate staff, clergy and committee chairs.



### **III. Strategic Goals**

#### GOAL 1

##### CONTINUE TO DEVELOP A SENSE OF WELCOME, IN THE CONGREGATION

Fostering a sense of community at Temple Rodef Shalom is the essential element in achieving a sacred community and an important factor in why congregants remain members of the Temple. It was the first Goal in the 2002 Plan and fostering a welcoming community remains so in this plan.

Congregants report that one of the best things about TRS is their strong sense of belonging, the warm welcoming of the community and the efforts to make members feel included. “There’s enough going for everyone to find a place if they desire”. “[We like] the vast net [TRS] tries to service. It’s not just interested in the old families or the new families or the traditional families or families without any issues. It has programs for everyone.” And another Congregant echoed: “It’s a wonderful place. I hope that others are partaking in the full range of services TRS offers...” Yet, others perceive that the established members tend to cluster in cliques, leaving new members on their own not feeling welcomed. Like neighborhoods, college campuses and other communities, better strategies to integrate new members are needed and opportunities to form small groups are essential in a large congregation. Another congregant captured the issue this way: “It is difficult to feel like a part of the TRS family. I accept some responsibility for that since I don’t take full advantage of all the things I would like to do”.

Some smaller communities exist at TRS: Renaissance (over 50 and empty nesters), Vatikim (over 70), Kallah (20’s – 30’s) Tappers (pre – school) Chaverin (single parents), Keshet (gay and Lesbian), and wine and cheese welcomes. But to foster a feeling of inclusiveness, groups must continue to integrate new members, and new members must seek out situations in which they form bonds and friendships.

A welcoming community also means that there are no barriers to participation, physical or otherwise, for congregants and visitors. Concerns were raised that TRS should review its accessibility to congregants with special needs. Certain strides have been made in these areas. For example, an ad hoc Accessibility Committee is working to make the sanctuary and bema more accessible. But more can be done.

The challenge remains for TRS: foster groupings and connections without creating “cliques”, retain members who feel bonded yet encourage new opportunities for groups to interact across age and interests; and create accessible physical spaces and programs.

#### GOAL 2

##### PLAN FOR GROWTH AND MAXIMIZE THE OPPORTUNITIES WITHIN OUR LARGE, VIBRANT CONGREGATION

Growth has been a constant for Temple Rodef Shalom. While other congregations are struggling to maintain membership and programming, our congregation increases by 50 families a year; young families, older members and all the demographic groups in between are burgeoning.

Serving a growing community, the Temple offers more and diverse services, programs and niche groups, which in turn attracts more members.

However, growth brings concerns, as expressed by the congregants in the 2006 survey. “There are a lot of choices, but too little common ground”, said one congregant. Are we fragmenting into “groups without cohesion”? Are we “too large and less flexible”? One congregant felt that their spirituality got lost in a bigger congregation. Many others worried that the clergy was overburdened, causing congregants to be hesitant to seek them out. (Although another congregant pointed out “Although I don’t have a huge presence in the Temple, I can always contact any of the clergy and expect a prompt, thoughtful response”.) Still others wondered when it would be time to hire a 4<sup>th</sup> clergy, and how we could expand our facility when the time came to do so. And finally, parking and traffic control continue to be mentioned as issues, particularly as we grow.

While growth is a concern, it also creates many opportunities. For example, the Internet and other communication devices and technology could connect and unite our congregants in innovative ways. Broadband, streaming video, on-line networking, blogs and other new tools could allow our congregation to become interactive participants in services, and educational programs, to share materials, interests and expertise, solicit clergy advice, and create smaller social group activities. These are just some of the uses for technology that we should explore.

Growth is the implied charge of a Strategic Plan and the Committee believes that it is time to tackle this concept head on. We believe that a Task Force should be constituted to achieve the following: 1) reassure congregants that the Temple is thinking about and planning for long term growth; 2) research other large and/or growing congregations, Jewish and non-Jewish, in the Washington/Northern Virginia area and other regions, for models and ideas on growth; 3) think “beyond the box” to possible technology tools to assist us in managing growth and ministering to the congregation; and 4) determine strategies to keep the congregational “umbrella” strong and vibrant, while encouraging “ribs” to form and grow. In other words, to foster smaller groups to flourish which all feel proudly connected in some manner to the whole.

Fulfilling this Goal is of vital importance to Temple Rodef Shalom.

### GOAL 3

#### INCREASE AND DEVELOP CHILDREN’S SENSE OF COMMUNITY, POSITIVE JEWISH IDENTITY AND EDUCATIONAL OPPORTUNITES

While many congregants expressed joy that their children and teens were connected to the Temple Community, others lamented that their children were not. Yet congregants recognize the tremendous commitment the Temple demonstrates to its children and family activities. “TRS runs excellent children services.... I grew up with a temple that never did much for children and our Temple’s child-friendly activities are what I brag about to my friends who belong to other temples.”

The goals of increasing our children’s strong sense of community, positive Jewish identity and educational opportunities are embodied in TRS’ schools, children’s programs and youth groups. Traditionally, however, education has been the responsibility of the religious and nursery schools; community building, the responsibility of the various youth groups; and Jewish identity and spirituality, the responsibility of the clergy. It is now recognized that all parts of the Temple

community must come together to contribute to the upbringing of a child who identifies as a Jew, who feels a strong congregational community bond, and has a solid educational foundation for future Jewish growth and exploration. In addition, some have suggested that more education should take place with the entire family present.

Goal 3 is receiving special attention this year. Rabbi Schwartzman has assumed the temporary position of Acting Religious School Director, to explore with the Congregation creative programming changes for our youth. A Task Force was constituted to redefine and broaden the role of the Educator for the Temple, and this new position was filled in early 2007.

While activities for our children at TRS have exploded, more can be done to attain this multifaceted goal.

#### GOAL 4

#### CONTINUE TO ENRICH EDUCATIONAL AND SPIRITUAL OPPORTUNITIES FOR THE CONGREGATION

The past five years have brought many new educational opportunities to the TRS Congregation, and have launched, guided and fostered many members on a Jewish spiritual journey. The educational offerings at TRS are rich and diverse: Hebrew classes, beginning, intermediate and advanced, Torah chanting, Talmud study, just to name a few. The Adult Limud sessions have attracted enthusiastic participants, and the Scholar-in-Residence programs bring noted talent to our doors.

But there are many more opportunities to go farther and deeper into subjects. From Rabbi Shire's classes during Rabbi Schwartzman's sabbatical, to lay-led outreach workshops, we have learned that spirituality and Jewish education go hand in hand.

Congregants lauded the weekly parsha discussions in the e-newsletter. Said one congregant, "I also really like the e-mail newsletter. Even if I don't attend worship services, I feel that I have at least one opportunity a week to contemplate spiritual issues." Others appreciated the serious spiritual and religious tone established by the clergy. To many, TRS is their "spiritual home." And the demand on the clergy for conversion is so strong that for the first time, a conversion class was formed to be able to accommodate these spiritual needs.

But others only felt the absence of spirituality, likening our Temple to a "well-run business, rather than a spiritual place." Another congregant lamented that the "deeply spiritual too often gets lost in the communal."

We cannot just add more and more programs to our already full plate. The Temple's resources and facility should not be overtaxed in an attempt to offer a smorgasbord of educational and spiritual opportunities. Rabbi Schwartzman reminds us that we must be transformative, not additive in our programming.

Clearly, a Temple should enable all within to explore and foster their spirituality through study, services, music and prayer. Attention is being paid to these needs and including this goal ensures that these efforts will continue and build upon the strong foundation already laid.

## GOAL 5

### CONTINUE OUTREACH TO INTERMARRIED FAMILIES AND EDUCATION OF THE CONGREGATION REGARDING INTERMARRIAGE ISSUES.

Even from its inception, TRS has attracted interfaith and intermarried family members. However, since 1980 the number and percentage of intermarried families has grown in tandem with the emphasis on outreach by the URJ. Since 2005, roughly 30% of new member families joining TRS have been intermarried, and by 2006, intermarried families comprised 1/3 of the Congregation.

Clearly, intermarried families continue to find a welcome “home” at TRS and contribute to our vibrant congregation. Said one congregant, “ I feel the Temple should know that its being open and accommodating toward interfaith families has been a true gift in my life and has made it easier to raise our children as Jews”. Some of TRS’ most active members are from intermarried families. And many members are taking advantage of our conversion process.

Many congregants mentioned the “open attitude towards interfaith marriages” as one of the best aspects of the congregation. But the issue of the interfaith marriage ceremony remains a subject of passionate discussion, and also not many families are taking advantage of interfaith programming. More work is necessary to determine and meet the needs of intermarried families, and to educate the remainder of the congregation about these issues.

## GOAL 6

### STRIVE FOR LONG TERM FINANCIAL STABILITY NOT WHOLLY DEPENDENT UPON DUES

Currently, dues account for 75% of TRS annual revenue. The renovation of the building, while mostly paid for by pledges, still necessitated a \$4M long term mortgage. The Temple has a \$1 million endowment which is extremely modest in relation to our size and budget, and the URJ encourages all congregations to focus on endowments as an alternative source of funds.

Growth of revenues derived from new members may meet the current financial requirements of TRS, but achieving financial stability that is not wholly dependent upon dues could ensure the financial future of the Temple. It would also free the Congregation from a requirement that it must grow to cover increasing expenses and programming. For all these reasons, TRS should continue to explore revenue opportunities other than dues. The Board is exploring ways to accomplish this goal, for example, a capital campaign is being discussed to culminate on the 50<sup>th</sup> Anniversary of the Temple in 2012.

At this writing, the Temple is in search of a Director of Membership Development who will focus on this Goal, in a manner that respects the culture of the TRS Congregation. It is the vision that the Director of Membership Development will intertwine this goal with Goals 1 and 2, integrating new members, helping to create strong community bonds, developing strong giving commitments within our congregation, but without constantly asking for funds.

## GOAL 7

### OPTIMIZE GOVERNANCE, COMMITTEE COORDINATION AND MEMBER PARTICIPATION

The Board of Directors of TRS contains approximately 60 people, most of whom sit on the Board in their capacity as co-chairs of the committees. The remainder are the officers, and at-large members. Such a large Board includes more people in the information flow, both to and from the Board and its officers, but reduces actual governance decisions at the Board level. Moreover, Board membership changes every two years when the Committee Chair positions rotate. Although the committee chair composition of our Board is unusual (most Temple Boards are comprised of the officers of the congregation and at-large representatives not affiliated with any particular group), this structure has worked well for TRS, with some modifications over the years. For example, 5 at-large delegates were added to the Board in 1996. In 2006 the Board composition was again studied and two changes were implemented: first the number of at-large delegates can now vary between 2 and 5 at the discretion of the Board, and second the recording, corresponding and financial secretarial positions were re-organized and consolidated into secretary and assistant secretary. These changes reflected the experience with the at-large positions, the increased role of the staff in secretarial functions, and the assistance of technology in performing the secretarial tasks.

Although the Congregation is large, many committees experience difficulty in recruiting members and lack active participation except by the chairs and a handful of members. TRS is also affected by two phenomena that plague most volunteer organizations: reinventing the wheel with each group of new leaders, particularly at the Committee level, and the difficulty of exchanging ideas, working on joint programming and combining planning efforts between committees.

This Goal is designed to address all these issues.

## **IV. Recommendations**

### *Ongoing Planning and Assessment*

Identification of the foregoing goals is an extremely important part of, but not the end of the planning process. The Committee believes that it is critical that these goals and strategies, and the results of the survey, be communicated to the Officers, Clergy, Committees and the Congregation and that specific action steps be quickly identified and developed to implement the goals.

The Long Range Planning Committee takes the following actions:

- (1) brief the clergy, officers and the Executive Committee and the Board on the proposed revised 2007 Plan and Goals (completed)
- (2) gain the approval of the Executive Committee and the Board to the proposed revised 2007 Plan and Goals (completed)
- (3) identify ways in which the 2002 goals have been addressed (completed)
- (4) identify opportunities for the future (completed)
- (5) assist the Board to prioritize future decisions (ongoing)

- (6) assess progress toward the goals (ongoing); and
- (7) assist the committees in planning for each upcoming year (ongoing).

We should not lose sight of the fact that, in general, the Congregation is satisfied with this synagogue – its programs, services and clergy. However, we cannot simply pile new programs on top of old. As Rabbi Schwartzman has so aptly stated, our strategy should be transformative rather than just additive. Nor can we rest on our laurels and expect to retain a satisfied Congregation.

The Committee also highly recommends holding an annual orientation for committee chairs and Vice Presidents when the committees begin their annual planning. This orientation would include a presentation and discussion on how to use the Plan, how to pass on history and information from prior chairs, assistance in planning for the upcoming year and beyond, and enhancing coordination and communication among committees, staff, and Congregation. The Chairs would prepare an action plan for the year ahead and a “looking back” assessment to see how their activities have forwarded the goals of the plan (and other goals as well). An outline of a planning session can be found in Appendix O and worksheets to capture and organize this information are attached as Appendix P.

Each committee should have at least one planning session in September to finalize their plans for the year. The Committee also recommends that at least one Board meeting (or some time at a few meetings) be dedicated to the committees reporting and discussing with one another, their plans and programs. The Vice Presidents should also report regularly to the Executive Committee on their committees’ programs and projects. The Leadership Development Committee could coordinate with these activities, particularly at the orientation meeting, to help train committee leadership and monitor committee functioning.

### *Task Force on Growth*

Last, but not least, the Committee recommends that a Task Force on Growth be constituted by the end of 2007 to gather information and continue, in an organized and thoughtful way, our planning for growth, including additional clergy, facilities, and programming and incorporating the fiscal planning already undertaken by the Executive Committee and the Board.

### *Reassessment*

In undertaking this strategic planning process, the Committee strived to follow the systematic approach developed in the 2002 Plan process that would assure thoroughness in the current endeavor, solicit committee, clergy, and member input, and continue to provide a roadmap for future planning. The Committee is hopeful that the process it followed will again be used as a guide for future strategic planning by TRS.

Since strategic planning is a dynamic process, the Committee considers this plan to be a living document. The Officers, Committee Chairs, Clergy, and Staff should review the goals, strategies and actions set forth in this plan at least annually to determine which strategies and actions have been effective, which goals have been achieved and where additional work needs to be undertaken. The goals themselves should be re-evaluated at least every 7 years (i.e., start the re-evaluation process at the 5<sup>th</sup> year and assume a two-year process.) The current process began in 2004 so the next information gathering cycle should begin in 2009.

## V. Conclusion

This 2007 comprehensive strategic plan continues the cyclical process of evaluation and re-setting of goals. Both the process undertaken, and this plan itself can serve as a continued model and roadmap for future long range planning committees.

It is our sincerest hope that this plan will again be used by the Clergy, Staff, Officers, Chairs and the Congregation, to move Temple Rodef Shalom in a common direction toward achieving a sacred Jewish community.

Respectfully Submitted,  
Long Range Planning Committee

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### Appendices

- Appendix A - 2005 Demographic Report
- Appendix B - 2006 Membership Demographics
- Appendix C - Comparison of 2002 Plan and 2007 Plan Goals
- Appendix D - 2006 Survey Questions
- Appendix E - 2006 Survey Report
- Appendix F - Comparison of 2000 and 2006 Survey Results
- Appendix G - Scatterplot-2000 Survey
- Appendix H - Scatterplot-2006 Survey
- Appendix I - Efforts to Reach 2002 Goals
- Appendix J - Areas of Opportunity for 2007 Goals
- Appendix K - 2002 Strategic Plan
- Appendix L - 2000 Survey Questions
- Appendix M - Action Items
- Appendix N - "TRS Pursuit of Inclusion" – TRS Bulletin, March 2007
- Appendix O - Committee Planning Session – Outline
- Appendix P - Committee Planning Worksheets