

# Strengthening Our Community: A Strategic Plan for Congregation Beth El (2011-2015)

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## Congregation Beth El Strategic Planning Committee

Katherine Haynes Sanstad, Chair

Adele Amodeo

Susan Austin

Alex Bergtraun

Jeff Brand

Martin Dodd

Lisa Feldman

Ann Gonski

Jennifer Kewar

Peggy Lipson

Emily Marthinsen

Jim Offel

Sara Sarasohn

Debra Schoenberg

Elizabeth Sharf

Judy Wolff-Bolton

Ex Officio

Joanne Backman, President

Dan Magid, 1<sup>st</sup> Vice President & President Elect

Rabbi Yoel Kahn

Norm Frankel, Executive Director

Mike Austin, Strategic Planning Consultant

December, 2010

Dear Board Members and Trustees:

In response to your charge in December 2009, this strategic plan is presented to you, as stewards of Congregation Beth El, to use in guiding the work of the congregation over the next five years.

The intention of the 2010 Strategic Planning Committee was to provide a tool for mission-driven program planning. Thus, the revised Mission and newly crafted Vision appear in the front of this document followed by the five key strategies for 2011-2015 (membership growth, financial stability, volunteer-staff partnership, communications, and programming). And we hope that as clergy, staff, lay leaders, and volunteers work together to create an annual program plan, they will hold each program to the standard of advancing one of the key strategies.

There are, I believe, two fundamental elements in this plan that will change how Congregation Beth El pursues its vision and that can foster significant transformation of our community. They are:

- Consciously embracing collaboration between volunteers and professionals by doing what it takes to support collaboration as the force that energizes Congregation Beth El.
- Engaging in integrated, unified programming to give shape to our annual schedule of programs by building deep connections among all of the different parts of Beth El, ensuring that they are all working together in pursuit of shared goals.
- Building a culture of involvement that encourages each member to find ways to share their expertise, energy, and time so that by the time we revisit our Vision 2020, we shall have become a community where we actually know each other's names and special qualities and we enrich each other's lives.

We urge you to move quickly to appoint an small Strategic Plan Implementation Oversight Committee that can work closely with the President Elect to ensure the plan is put into action. We recommend that this committee include Board and Program Council representatives, the Executive Director and volunteers with necessary interest and skills. This committee should help the Board recommend teams of volunteers and staff to implement parts of the plan. For example the Board Membership Committee would drive the membership strategy and an ad hoc committee would drive communications. The Oversight Committee should bring regular implementation updates to the Board and Program Council.

For each strategy, the plan contains recommended actions, a timeline, and a supporting appendix. to assist with implementing the plan (e.g. the Membership Committee) and serving as a basis for planning programming and evaluating success.

This plan will only be a document without active leadership from the Board. It cannot succeed without equally active support and engagement of Clergy and Senior Staff. We trust that, as you work with Senior Staff and Clergy to guide the implementation of this plan over the next five years, Congregation Beth El will be enriched and united in creating an ever more vibrant and welcoming Jewish community.

L'Shalom,

Katherine Haynes Sanstad  
Immediate Past President and Strategic Planning Committee Chair



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## I. INTRODUCTION

### ***Why the need for a Strategic Plan?***

In 2010 Congregation Beth El embarked on a strategy development process that resulted in this strategic plan to guide our community's development over the next five years (2011-2015). The purpose of the strategic plan is to make our values and goals explicit and articulate strategies for achieving our goals. It is a strategic framework that allows for discretion in implementation, reflects our values, and is responsive to changes in the environment in which we operate. It should provide a context for making choices of how we spend our resources, what capabilities we develop, and how we adapt to unforeseeable circumstances. As we face the challenges of meeting our congregation's programmatic and financial needs, this is a critical moment in Beth El's history. It is time to consciously choose the path we intend to follow and make plans for pursuing it.

### ***How was the Strategic Plan developed?***

To create a multi-year strategic plan, we explored key issues and questions in a series of meetings held over six months (February to June). Organized into subcommittees, each meeting included background materials and presentations on the subject at hand, discussion with the committee, and a clear articulation of what further research or action was needed prior to summarizing lessons and recommendations on the topic. The Strategic Planning Committee reconvened at the end of August (after a summer of drafting the plan) to identify implementation issues in order to present the draft plan to members of the congregation in a town hall meeting (September) for comment prior to being finalized and presented to the Board (December).

In order to streamline the planning process, the following key questions guided the committee discussions:

1. What is our current mission and vision in the context of our history?
2. Who are our members, how well are we serving them and how might we strengthen systems that support more meaningful engagement?
3. In addition to the dues structure, what might be the best business model for Congregation Beth El over the next several decades that takes into account the stability of our 500 household members over the past several decades?
4. What are the strengths and areas for improving our programming and how do they relate to promising practices in other synagogues and social service organizations?
5. What is going on in the broader social environment that will affect us?
6. What kind of leadership will we need and how shall we build it?
7. What are the optimal roles for staff and volunteers and how should they relate to one another?

### ***Involving the Congregation in Strategic Planning***

As a membership organization it was important to create opportunities for congregants and staff to participate in the planning process. In addition to announcements in eUpdate, congregants were encouraged to attend public sessions as well as send email suggestions to the [bethelspg@googlegroups.com](mailto:bethelspg@googlegroups.com). In addition, multiple staff and volunteers were interviewed and surveyed as part of the committee work. Finally, the draft strategic plan was presented in town hall meetings in the Fall for community comment prior to being finalized and presented to the Board.

The following committees of congregants and staff helped to develop the plan:

*Mission, Vision & History Committee:* Sue Austin, Jeff Brand, Martin Dodd (Chair), Rabbi Kahn & Betsy Sharf

*Membership Committee:* Norm Frankel, Jim Offel (Chair), Sara Sarasohn, & Rob Graup

*Revenue Model Committee:* Lisa Feldman (Chair), Jennifer Kavar, Peggy Lipson, Dan Magid, & Katherine Haynes Sanstad

*Program Committee:* Adele Amodeo (Chair), Eileen Crumm, Rabbi Kahn, Debra Schoenberg

*Staff & Volunteer Roles Committee:* Ann Gonski (Chair), Norm Frankel, Rabbi Kahn, & Emily Martinson, Katherine Haynes-Sanstad

*Communications Committee:* Sue Austin (Chair), Peggy Lipson, & Betsy Sharf

*Space Utilization Committee:* Alex Bergtraun

*Facilitating the Town Hall Meetings:* Lisa Feldman, Dan Magid, Emily Marthinsen

*Constructing the Draft Strategic Plan:* Katherine Haynes Sanstad & Mike Austin

### ***Building on Our Strengths***

This strategic plan is being completed during a time when our 65-year-old congregation faces significant financial challenges as well as the great promise of a newly revitalized senior staff. We have a new clergy team in Rabbi Kahn and Rabbi Zellman along with a new team of professionals that includes our Executive Director, Norman Frankel, our Education Director, Debra Sagan Massey, our Youth Director, Rebecca Depalma, Camp Director, Zach Landres-Schnur along with the continuing service of our Pre-school Director, Barbara Kanter and members of our office staff. Our talented staff members have provided valuable insights in helping to shape this strategic and they serve as our partners in implementing the plan.

Our new building continues to be a source of pride for those who engage in the many activities that comprise our new home. As noted in this plan, there are many new ideas for making our new home a truly important part of our family life.

Our many strengths also include long-standing programs that have served our members and the community at-large. They include our outstanding pre-school, Camp KeeTov, our social action meals for the homeless, Torah Study, and many more.

Our diverse membership has also been a source of strength in providing a spiritual home for members with different religious backgrounds, life styles, family structures, and ages. This diversity has also provided the strength needed to continuously search for new ways to meet the changing needs of our membership and engage in organizational renewal.

### ***Capturing Our Past, Present, and Future***

*Our Past:* In order to build upon the rich history of our congregation, we needed to capture it and document it in one place. It reflects our long-standing commitment to create partnerships between volunteers and professionals that was key to building and sustaining the congregation over the past sixty-five years. Many hours have been devoted to supporting programs, raising funds, creating inspiring religious services, and contributing to community projects. These partnerships are essential in the life of the congregation. A brief description of our history is located at the end of this Introduction section.

*Our Present:* As a way to capture the present, we reviewed old copies of our **Mission Statement** with the goal of revising and strengthening it. It reflects our origins, our values, and our goals as noted below.

### **Mission Statement -- Congregation Beth El (2010)**

Founded in 1945 by small group of Berkeley families who traced their roots to Eastern and Western Europe, Congregation Beth El is a liberal, Reform congregation committed to building and sustaining a caring synagogue community by:

- Welcoming Jews of all backgrounds (ages, abilities, sexual and gender orientation, and levels of observance) and their families, and involving them in creating a sacred community, *kehillah kedoshah*;
- Encouraging innovation to sustain Jewish spiritual life while honoring Jewish traditions and respecting the diversity of Jewish practice, *avodah*;
- Celebrating the diversity of our members and community with the belief that each person is made in God's image, *tzelem Elohim*;
- Encouraging the study of Torah as part of lifelong Jewish learning, *talmud Torah*;
- Pursuing social action and working for social justice, *tikkun olam*;
- Nurturing children, youth, and families through formal and informal education, *shinantem l'vanecha*;
- Engaging in respectful dialogue about Israel as part of our commitment to the people, land and State of Israel, *Am Yisrael and Eretz Yisrael*

Proposed Tagline: *Honoring Tradition, Celebrating Diversity, and Building a Jewish Future*

The Mission Statement is based on the following major goals of the congregation:

- To illuminate the richness of Judaism and to make Judaism meaningful in our members' daily lives—to offer spiritual connection and intellectual challenge through worship, prayer and study;
- To strengthen engagement, involvement and retention of our members by building connections among our members and partnerships with the staff;
- To reach out to potential members to help us grow our congregation;
- To develop and maintain the leadership team (clergy, staff, lay leadership) necessary to sustain the congregation in the short and long term.
- To ensure the congregation has the financial resources to support our goals through fundraising, sound fiscal management and effective marketing.

This Mission Statement also reflects the efforts of each generation to make the congregation relevant to current times and thereby build upon the pioneering work of its founders.

*Our Future:* The process of generating a **Vision Statement** about the congregation in the year 2020 provides an opportunity to dream and, ultimately, work toward realizing the dream. Our dream in the early 1990s was to envision ourselves in a new building designed to meet the changing needs of our membership. When we surveyed our membership in 2006, we asked them to create a new vision since the last dream became a reality. Many of their ideas are captured in the vision statement below.

### **Vision Statement -- Congregation Beth El in 2020**

In the year 2020, Congregation Beth El will be known as a vibrant, financially secure home built upon a unique collaboration between clergy, staff and congregants who have created an engaged and caring community recognized for its spiritual, educational and leadership development programs and inspired by the innovative adaptation of social networking technology.

### **Transforming our synagogue culture: A path for implementing our Mission and reaching our Vision**

In addition to promoting the new Mission and Vision statements, it became clear to the members of the strategic planning committee that we need to transform our organizational culture in order to support volunteer-led, staff-supported activities as well as staff-led, volunteer supported activities. In essence, we need to promote a *culture of involvement* that includes:

- *engagement* – moving beyond annual dues payment and periodic attendance at services, members are moved to and supported to contribute to creating a welcoming congregation
- *shared learning* – building on the successes of Torah Study, members explore ways that provide them with new opportunities to learn through a range of family and adult learning activities.
- *communal observance*—building upon spirit of diversity found in our new prayer book, members find new modes of meaningful religious observance that can include music, the arts, outdoor spirituality, etc.

- *collaborative teamwork*—involving volunteers, clergy, and staff in team-supported activities as well as working with other communal organizations to jointly-sponsor events (We sometimes use the term *staff* to mean both staff and clergy – paid synagogue personnel. Sometimes we state both staff and clergy. The term staff does not exclude clergy when used alone.)

## II. MAJOR STRATEGIES

### **Strategy #1: *Expanding Membership In-reach and Retention***

The Membership subcommittee of the Strategic Planning Committee was charged with framing a membership strategy for Congregation Beth El. This work was done concurrently with other subcommittees (Financial Stability, Volunteers/Staff Relations, Communications, and Program based on the assumption that the recommendations of the other subcommittees may impact some of the assumptions and conclusions and recommendations for membership strategy.

*Membership...is best nurtured when the individuals in your community are known, valued and supported throughout their individual and family life cycle. <sup>1</sup>*

#### **Assumptions**

##### *1. Focusing on our community first*

The Revenue Model subcommittee's report includes a recommendation to plan for a "steady state" membership model at 500 member units (approximate current membership level) as a basis for financial planning. While the Program Committee recommends a focus on providing the best programming and congregation experience possible for our current 500 member-households.

##### *2. Financial Constraints*

Based on the financial realities of a "steady state" membership model along with the Congregation's significant debt related to the new building, membership strategies must be targeted, low cost, and volunteer-led with an appropriate level of staff/volunteer collaboration.

##### *3. Member Attrition & Acquisition Formulas*

Evidence suggests an historical membership attrition rate of 15% at Beth El<sup>2</sup>. Using this as a benchmark, maintaining a 500-member base necessitates acquiring approximately 75 new member units per year through acquisition/outreach strategies. However, the national average for attrition in reform Congregations is estimated at 8-12%<sup>3</sup>. A target of reducing attrition by 3%

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<sup>1</sup> URJ; Biennial Initiative, Lifelong Synagogue Membership

<sup>2</sup> Norm Frankel, Congregation Beth Executive Director

<sup>3</sup> Ibid

to the high end of the national average seems reasonable<sup>4</sup>. With an attrition rate of 12%, acquisition would need to be approximately 60 new member units annually to sustain 500 member units. Continuing to attract 75 new member households will produce slow growth.

## **Background**

There are a number of factors that have complicated Beth El's membership model in addition to those factors that tend to be universal in the Reform movement. While it is a common challenge that reform congregations lose members at the completion of the B'nai Mitzvah cycle for a family's child(ren), Beth El contends with the additional factor of seeing loss of members whose membership is contingent on participation in the Nursery school program and/or Camp Kee Tov. These "marginal" members may also be a factor in the higher-than-average rate of attrition experienced by Beth El. However, in the absence of good exit data, this is speculation only. These families also present an opportunity for recruitment.

There is also a factor at play in the membership model of Beth El that creates a multi-tiered level of involvement and affiliation. It is estimated<sup>5</sup> that there are 20-25 families currently who pay dues solely for the purpose of receiving discounts to Camp Kee Tov. These families do not engage with synagogue life in any meaningful way. The associated factor here of course, is that these families also do not require the same level of resources that more fully engaged families require. In addition to this subgroup, there are many families whose involvement/participation extends beyond their immediate core contact (for Camp or Nursery School, for example), but is still limited.

At the time that decisions were being made to construct the new building, it was assumed that an aggressive member acquisition effort would result in growth to 650-750 member units.

Several factors have been noted that explain the flaw in this objective. Among them are:

- the onset of a severe economic contraction beginning shortly after occupancy of the new building;
- inaccurate starting membership numbers based on incomplete membership rolls
- constrained resources related to the cost overrun of the building, which in turn resulted in an inability to dedicate resources to marketing and outreach;
- major changes in staff and clergy requiring concerted effort on the part of engaged lay leadership, which in turn further detracted from the resources available to conduct a focused membership acquisition effort.

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<sup>4</sup> Strategies for reducing attrition are discussed below

<sup>5</sup> Ibid

The combination of these factors makes for a situation today in which Congregational Beth El's membership remains essentially flat – an average of 487 member families over the past 6 years.

### **Assessment – Barriers & Assets**

There are several factors that may contribute to Beth El's higher than the national average attrition rate. These include community factors:

- Beth El's location in the Bay Area generally, and Berkeley specifically, where there is a higher level of transience than many parts of the country;
- Berkeley has a higher than average “unaffiliated” rate in its Jewish population;
- Berkeley (and the Bay Area) has a plethora of opportunities to “live Jewishly” without affiliating with a congregation.

There are also programmatic factors that, if not unique to Beth El, are at least exacerbated by historical practice. Specifically, the lack of integration between programs that attract families for a specific “service” and those that attract for congregational life results in members joining only for the purpose of “consuming” that service and then, at the completion of that cycle, dropping their membership. The Nursery School program and Camp Kee Tov both fit this model in part. Other programmatic factors include a lack of focus on those members who have historically been minorities in American synagogue life, inter-faith, young adult, GLBTI, etc.

The assets available to attract members include the new facility, new clergy and staff and changes in technology that allow us to efficiently create dialogue and build community. Other assets include - Highly professional/academic/intelligent/educated membership, social action opportunities, quality youth education programs, and newly thriving chavurot program.

### **Recommendations**

A comprehensive membership strategy consists of three components.<sup>6</sup> Recruitment (sometimes referred to as Outreach or Acquisition) of new members, Integration (or In-reach) that is focused on the initial three-year period of membership, and Retention all play an important role in maintaining a healthy membership model.

Determining the relative value of investment in each of these three components depends in part on understanding factors such as the “market” of potential members in the service area, the reasons members choose to join, and the factors that contribute to members leaving.

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<sup>6</sup> <http://urj.org/cong/membership/>

### Recruitment Strategies:

In light of the “steady-state” model suggested by the Strategy 500 model a significant Recruitment effort, targeting specific populations and utilizing extensive resources, is not recommended. Rather, it is the recommendation of this group that some basic, but important, efforts be made to improve existing outreach communication channels (including the website and Beth El Membership Packet).

As with Retention strategies, where attention is paid to those points in the member lifecycle when attrition tends to be highest, so here should attention be paid to those points in non-member lifecycles when synagogue membership is most likely to be considered. This would suggest, for example, targeting young families with programming that attracts and exposes them to the full range of family and education programming available at Beth El. With new programming, and a dynamic new education director marketing the Youth & Family Education program should be a major focus of outreach efforts.

Friendship strategies make some sense – that is, like attracts like; if every existing member invited a new member to a service or to an event, our recruitment would be much easier – not unlike inviting folks to be friends on Facebook.

Additional examples of programming that takes advantage of these natural “entry” points would be the Baby Playgroup program. Chai luncheon forum and Torah study can be used to attract potential members who may be interested in re-affiliating. The URJ document, *A Two –Year Action Plan for your Congregation’s Membership Committee to Attract, Engage and Foster Lifelong Members*, provides additional information and specific action steps for Recruitment.

We strongly believe that, while sustaining effective recruitment efforts, **our primary focus must be on integration of new members and retention of long-standing members.**

### Integration Strategies:

Integration should be composed of targeted efforts to identify and steward members who are naturally at risk of attrition. Key populations here include families “aging out” of nursery school or Youth & Family Education who are in their first three years of membership.

The idea of focusing on adults whose children attend a program is critical here. Our drive-through culture doesn’t allow for us to deepen loyalty of parents.

Early interactions with new members should focus on motivating them to get involved by using their momentum as new members to get them connected and excited. Early membership programs should include ways to communicate the history and rituals of Beth El. Programs that allow the long-time members to impart the reasons they love Beth El. Turning Beth El buyers into Beth El believers.

This simple act of warmly welcoming new members is also very important.

Identifying and creating volunteer opportunities for new members is an important part of integration, especially matching professional skills and or personal interests to the needs of different committees, events or social action projects.

Additional important elements within the Integration rubric include the Ambassador program, Chugs, and a robust Program Evaluation process that ensure resources are being devoted to high-impact activities that appeal to and draw new members in to the community.

The ultimate goal of the integration strategy is to ensure that all members who are within their first three years of membership are highly committed to Beth El and feel a part of the community.

### Retention Strategies:

To increase retention, Congregation Beth El must focus attention on those points in existing member lifecycles when membership is most likely to be at risk. While much attention has been paid to the attrition associated with completion of the B'nai Mitzvah process, for Beth El, target groups should include families “aging out” of Nursery school, Camp Kee Tov, and empty-nesters, to name a few.

Retention strategies need to deepen loyalty and deepen connections, both among members and between members and Beth El, by demonstrating that the congregation cares and values all its members (including honoring our seniors.) We need to use the energy of our members, as well as take advantage of our deep intellectual well.

We recommend that Congregation Beth El immediately implement an exit survey for all members who choose not to renew their membership. By collecting this data consistently over time will allow us to continue to fine-tune both the strategies for integration and retention.

Database strategies are key to understanding our members and delivering messages and content they care about. Future initiatives might include turning our website into a social networking site where members could connect outside the walls of the synagogue, but in which Beth El is the key to connection. Imagine streaming Fri/Sat services, Torah study discussions over the web. Here too, the strategy of taking the community out into the community through neighborhood (geo-mapping) affinity activity could play a role.

This is where the idea of a deep sacred covenant begins to take shape—where we create true caring community that engages and supports its members throughout their lives.

## Additional Resources

*The Lifecycle of Synagogue Membership*, URJ Press, [www.urjbooksandmusic.com](http://www.urjbooksandmusic.com)

*The Outreach and Membership Idea Book, The Outreach and Membership Idea Book Volume II*, URJ Press, [www.urjbooksandmusic.com](http://www.urjbooksandmusic.com)

*Two Year Action Plan – Membership*, URJ: This is a simple action plan for membership committees to implement with specific tactics in each of the three areas (Recruitment, Integration, and Retention) over a two-year time horizon.

URJ Programs and Classes, <http://urj.org/cong/membership/program/>

URJ Publications and Brochures on Membership, <http://urj.org/cong/membership/publications/>

*Approximately one million North American Jews once belonged to a synagogue but no longer do....Our challenge, then, is to create a synagogue whose message of Torah is so inspiring, whose spiritual energy is so transforming, and whose web of kinship and caring is so embracing that no one who enters its gates will ever consider forsaking the holy community that it provides.<sup>7</sup>*

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<sup>7</sup> Rabbi Eric Yoffie, Union for Reform Judaism North American Biennial, 2005

**Expanding Membership In-reach and Retention – Implementation Timeline 2011-2015**

<b>Year</b>	<b>Action Steps</b>	<b>Measures of Success</b>
2011	<b>Infrastructure</b>	
	<p>Develop job description for VP of Membership and Committee members and revise Committee Charter if needed</p> <p>Recruit a minimum of 12-16 active members of the Membership committee including a vice chair slated for chairperson for 2012</p> <p>Discuss development of Subcommittees for outreach, in-reach, retention or other</p>	<p>Job descriptions completed</p> <p>Charter revised, as needed</p> <p>Membership Committee has 12-16 members by the end of 2011</p> <p>Membership VP for 2012-2014 selected and trained</p> <p>Potential subcommittee chairs identified</p>
	<p>Work with Communications subcommittee to assess member communication needs and develop website/technology priorities for membership</p>	<p>Communications subcommittee achieves its targeted goals re: members’ and prospects’ use of website</p>
	<b>Outreach/Recruitment</b>	<b>Achieve</b> minimum 500 dues-paying Member Units (Families) census.
	<p>Collaborate with Communications and Marketing Committees to complete tasks for new member materials package.</p>	<p>New member materials plan in place by end of FY 2011</p>
	<p>With Communications Committee, identify best media channels and lead times for each category of members targeted by Beth El events</p> <p>Ensure referral sources (e.g. Gateways) receive notices of all events</p>	<p>Output from two committees by end of FY 2011</p> <p>Program Council treats every program open to community as recruitment opportunity</p> <p>In place by January 2011</p>

Year	Action Steps	Measures of Success
	Evaluate/revise timing and frequency of Prospective Member Brunch; calendar  Initiate “Bring-A-Friend” program	Two events calendared, held for FY 2011, at least one of which is a “Bring-A-Friend”  15 prospect Units attend all event(s)
	Demonstrate Beth El’s diversity through photographs in brochures and in displays at synagogue, with Communications and/or House Committees	Photos in next CKT and YFE brochures reflect diversity of Member Units  Photos/collage displayed at/near Membership Table in breezeway by April 2011
	<b>Inreach</b>	
	Expand # of Ambassadors to welcome new members	There are 15 Ambassadors by end of FY 2011  New members called within 2 weeks from when new member contact info received
	Ease transition for new members into Beth El’s Shabbat services	CD of basic Shabbat services available for new members, other congregants by Feb. 1, 2011.
	Assist existing Chavurot as needed to maintain themselves, and develop new Chavurot to meet member needs	Chavurah Owner identified by April 2011  Chavurah “consultants” will have assisted in the development of 2-4 new Chavurot by June 2011, one of which will be a Women’s Chavurah
	Begin discussion of Neighborhood program organization & implementation.	Owner of Neighborhood Program identified by end of FY 2011
	Complete development of member survey instrument; (implement in 2012)	Survey approved by Program Council and Communications Committee by end of FY 2011
	<b>Retention</b>	Maintain or improve upon 2009 retention rates
	Collect, evaluate and report on member losses at life-cycle periods	Report to Board and Program Council by January 2011
	Revise Exit Survey, mail to members	Survey sent to former members by February

<b>Year</b>	<b>Action Steps</b>	<b>Measures of Success</b>
	<p>who dropped 2008-2010 (or longer ago), and analyze results. (Note some data already on file from prior years)</p> <p>*Annual Action Item</p>	<p>2011</p> <p>Report to Board and Program Council on responses to survey by April 2011</p>
	<p>Work with Staff and Volunteer Coordinator to obtain New Member profiles and assist in connecting people to volunteer activities and for planning purposes</p>	<p>Profile information available to Membership Committee within one month of members' joining</p> <p>8% of new member units have volunteered within 6 months of joining (shared goal)</p>
<b>2012</b>	<b>Infrastructure</b>	
	<p>Develop subcommittees, as determined by Membership Committee and recommendations of Strategic Planning Committee.</p>	<p>All Subcommittee Chairs recruited by Oct 2012 &amp; work assigned to appropriate subcommittee (hereafter annual goal)</p>
	<b>Outreach</b>	
	<p>Develop and implement marketing/branding plan in conjunction with the Communication Committee</p>	<p>See Communication Comm. goals</p>
	<p>Plan and implement Prospective Member event(s) and calendar next year</p>	<p>Prospective member events attract at least 15 prospective member units; 2013 calendared</p>
	<p>Work with Program Council and staff to utilize media channels identified by Communications Committee</p>	<p>90% of events open to non-members are distributed thru media channels 6-8 weeks prior to event</p> <p>Non-members attend all open events and sign-in so that prospects can be pursued</p>
	<p>Advise Program Council on programs needed for targeted groups</p>	<p>Event with Be'echol Lashon (interracial families) implemented in 2012</p>
	<p>Expand "Bring a Friend" program</p>	<p>Hold a least two events in FY 2012</p> <p>Engage 5% of members in process</p>

<b>Year</b>	<b>Action Steps</b>	<b>Measures of Success</b>
	Offer Intro to Judaism /Taste of Judaism and a series of classes on interfaith issues at CBE at no cost at least once per year	Interfaith programs offered at CBE once per year and at other times in collaboration with others
	Plan for workshop with Karen Kushner on “Welcoming Congregations”	Hold program with at least 40 attendees (or start with Board and staff)
	Work with Young Adults at Beth El to co outreach to other young adults	Young Adults Chavurah or Committee formed and developing plans
	<b>Inreach</b>	
	Expand number of “Ambassador” contacts with new members first year they join	All new members called at least once later in the year to ensure members are becoming integrated
	Manage Chavurot & develop new ones, as needed *Annual Action Step	No more than 1 Chavurah dissolves and at least 2 more developed
	Develop New Member Orientation program as part of or separate from New Member Brunch	Materials and program contents completed by end of FY 2012.
	Develop member survey processing and evaluation template and conduct survey	Results of survey are collected and reported to committees and membership in agreed-upon format(s)
	Implement changes to Builder including new and old member profiles and “milestones/gossip” page	Positive feedback in Member Surveys and from other sources
	<b>Retention</b>	Retention reduced by 3% over 2011
	Measure member losses for prior year	Report to Board and Program Council by 1/2013
	Membership Committee continues to assist in connecting people to volunteer activities	10% of new members have volunteered within 6 months of joining (shared goal); 25% within 1 year of joining
	Complete development of and implement Neighborhood Program	At least 4 membership “pods” meeting by the end of FY 2012

Year	Action Steps	Measures of Success
2013	<b>Outreach</b>	
	Expand “Bring a Friend” program	Hold three events in FY 2012  Engage 5% of members in process (hereafter annual goal)
	Maximize use of technology to bring members/ together along various parameters & to market to prospects (Outreach and In-reach)	Increase minimum dues-paying Member Units (Families) census by 5% over prior year
	Develop and conduct New Member survey to test impact of new materials and gain feedback on success of member Integration efforts	Survey implemented by February 2012  Results made available to Board and other committees for planning purposes by end of FY 2012
	<b>Inreach</b>	<b>Increase</b> minimum dues-paying Member Unit census by 5% over prior year,
	Increase programming attractive to targeted groups in conjunction with Program Council	New programs offered  Positive feedback in member surveys
	Expand number of “Ambassadors” contacts with new members first year they join. *Annual Action Step	All new members called at enrollment and at least twice later in the year to ensure members are becoming integrated
	With Communications Comm., introduce social networking within congregants	
	<b>Retention</b>	Retention increased by 3% over 2011
	Continue roll-out of Neighborhood Program	All neighborhoods organized by the end of FY 2013
Revisit covenant project and develop if atmosphere conducive to its introduction	If conducive, new covenant written and approved by Board by end of FY 2113	

<b>Year</b>	<b>Action Steps</b>	<b>Measures of Success</b>
<b>2014</b>	<b>Outreach/Inreach</b>	<b>Increase</b> minimum dues-paying Member Units (Families) census by 5% over prior year
	Work with Referral/"Feeder" Groups to do joint programming	Get 15 referrals per year from external Referral sources
	Increase number of congregants volunteering within first year of membership	15% of new members have volunteered within 6 months of joining (shared goal); 30% within 1 year of joining
	Continue to support Neighborhood Program, Chavurot, Ambassador Program	Volunteer follows up with each group twice a year in first year and yearly thereafter  New members integrated into Neighborhood Group as part of Welcome/Ambassador program (hereafter annual goal)
	<b>Retention</b>	Retention increased by 5% over 2011
	With Program Council, develop programs specifically designed as intergenerational	
<b>2015</b>	Continue & expand activities/programs as appropriate	<b>Increase</b> minimum dues-paying Member Units (Families) census by 5% over prior year
	Develop next 5 year strategic plan	Plan for continued growth and increased retention for 2016-2020

## ***Strategy #2: Building financial stability and making effective use of space***

Congregation Beth El has been a 500-household synagogue for decades. There were times when the membership roles numbered 600, but that reflected lack of timely list cleaning rather than membership growth. Since a growth in membership often comes from satisfied community members who encourage their friends to join the congregation, we propose that we focus 90 percent of our energy on ensuring that our current members are enriched by their involvement in Beth El. We propose that we structure our budget and operations to support a community of 500. We propose that we market to the broader community to ensure that we can sustain a community of 500. If we excel at satisfying our community of 500 households, we will grow in connection, in depth of commitment to one and other and to the Jewish community and, ultimately in the number of members.

### **Understanding the Past**

Congregation Beth El has faced significant financial challenges since setting out to build the facility at 1301 Oxford Street. Beth El met the initial challenge of building by launching a lay-led capital campaign that raised \$4.2 million dollars from the 500-household congregation, a sum that exceeded professional fundraiser's projections of fundraising potential by a factor of 2. Beth El also sold its old building for \$3 million. The Congregation expected to combine these funds with a mortgage of \$3 million to finance the new 31,000 sq ft building. However, the multi-year delay in construction that resulted from neighborhood political and legal opposition and our congregation's effort to address neighborhood concerns, coupled with an unprecedented increase in cost of building materials led to an almost two-fold increase in the cost of the building. The final cost was closer to \$18 million rather than \$10 million.

The Congregation borrowed money to meet the gap between funds available from the successful capital campaign and the sale of the Vine Street property and the cost of the building. Thus, when Congregation Beth El moved into the facility at 1301 Oxford Street in 2005, it carried a debt burden of nearly 10 million dollars on average annual revenue of \$2.7 million, with no endowment. Loans came from three sources: approximately 26% in congregant direct or secured loans, and 74% from City National Bank (CNB). In June 2010, the Congregation's total indebtedness was \$9.8 million, \$7.2 million from CNB and \$2.5 million from congregant sources.

Congregation Beth El is, without question, "house poor." While annual revenue from operations slightly exceeds operating expenses, generating a modest operating surplus, the mortgage payment consumes that operating surplus and, in recent years has produced a deficit. This financial reality has been the focus of staff, clergy and lay leadership since 2003.

In 2008, the Congregation anticipated that it would not be able to make mortgage payments and approached CNB in November of 2008 to restructure the terms of the loan. The Congregation withheld payments during negotiations and the loan went into default in March of 2009. After nearly 11 months of negotiations, led by a team of congregants, the loan was successfully renegotiated, cutting monthly mortgage payments from \$55K to \$25K while committing to a schedule of eight lump sum payments to decrease principal. The first such payment, \$250,000, must be made in June of 2012.

The debt burden means that Congregation Beth El must raise a minimum of \$450K each year, over and above annual dues to meet its cost. It must raise an additional \$2.6 million over the next 9 years to meet the obligation to pay down principal. The debt burden is and has been the central focus of the congregation for the past five years. It has dominated the attention of clergy, staff, and lay leadership even as they faced unprecedented staff turnover and the need to build on the promise of new clergy in a facility full of potential to attract and retain members. Our essential challenge today is to formulate and implement a financial strategy that at not only addresses this pressing debt, but also builds a sustainable revenue model that allows us to realize our vision for our community.

### **Addressing our Future**

A five-part approach is needed:

- Maximizing revenue from existing sources
  - Our biggest income producing sources are Camp Kee Tov, Annual Dues, Nursery School, and member contributions, in that order. To secure our financial future, the Congregation must maximize income from all sources.
- Implementing well developed fundraising program, including a capital campaign
  - Build the systems and processes to support a professional fundraising operation (including administrative support, fundraising database, well trained and engaged lay and staff leadership).
  - Identify lay leadership for fundraising (e.g. VP Development) & Capital Campaign Chairs
  - Specify the time demands on the Rabbi for the capital campaign
  - Launch a capital campaign in 2010 with a goal of completing silent phase
  - Analyze and optimize existing fundraising events (including the Gala, Livod Hatsibur, Purim Baskets, etc.)
  - Organize and market naming/recognition opportunities
- Launching new revenue generating efforts that are consistent with our community's strengths and values.
  - Convening an ad hoc revenue enhancement committee of skilled congregants to review new revenue generating endeavors, including expanding early childhood

education, leveraging our buildings and grounds (see below), and co-sponsoring revenue generating public programs.

- Strengthen current financial management systems
  - Restructure financial/accounting policies and procedures (in process)
  - Rebuild accounting dept
  - Develop consistent financial/managerial accounting reporting and procedures
- Improving the management of our physical assets (building & grounds) to protect and make the most of our greatest untapped asset, our building.
  - Explore revenue potential from renting space in the building (kitchen for cooking school, classrooms for conferencing, coffee bar/café)
  - Identify internal (wall displays and art work, social hall equipment/stage, gift shop, furnishings) and external property improvements (signage, bricks/plaque program, fencing)
  - Identify operations manager to adequately assess/address the needs of facility and provide ongoing oversight of our primary assets

## Implementation Timeline

<b>Year</b>	<b>Action Steps</b>	<b>Measures of Success</b>
<b>2011</b>	Identify key business metrics and build reporting mechanisms and organizational dashboard	Capital campaign targets met
	Primary fundraising period for capital campaign	Increased net program revenue by \$50,000
	Analyze existing sources of income to maximize income (KeeTov, dues, Nursery School, donations)	Increased dues revenue by \$25,000
	Develop consistent financial/management accounting procedures and reporting formats	
	Develop multi-year building maintenance plan	
	Identify new revenue-generating opportunities	
<b>2012</b>	Complete capital campaign	Pay \$250,000 to CNB
	Implement changes to existing sources of income	Identified two new revenue-generating opportunities
	Implement the multi-year building maintenance plan	Increased net program revenue by \$50,000
	Implement plan for new revenue-generating opportunities	Increased dues revenue by

		\$25,000
2013	Complete capital campaign	Pay \$425,000 to CNB
	Refine changes to existing sources of income based on feedback from experience in 2012	
	Implement the multi-year building maintenance plan	
	Refine changes to revenue-generating opportunities base on feedback from experience in 2012	
2014	Implement the multi-year building maintenance plan	Pay \$425,000 to CNB
2015	Implement the multi-year building maintenance plan	Pay \$425,000 to CNB

### **Strategy #3: *Strengthening the Volunteer-Staff Partnership***

Achieving the Strategic Vision for Beth El—creating the Beth El of 2020—will require significant multi-partner collaboration. An effective volunteer/professional partnership is critical to the success of any synagogue—and there are many models for this, depending on congregation size, character, and resources. Like many congregations, Congregation Beth El historically relied heavily on the volunteer work of its stay-at-home women. And, like many congregations today, Beth El no longer has that luxury. Beth El appears to have no shortage of individuals willing to “help out.” It does not, however, have the volunteer infrastructure to organize those helpers. In addition, Beth El has not been successful at developing its volunteer leaders for either administrative or governance roles. Although many very committed individuals take on these responsibilities and perform admirably—often brilliantly—for many years, the congregation does not provide a structure for finding and growing its next generation of volunteer leaders.

Using volunteers and collaboration of any sort requires clarity of roles, administrative support, and time. Congregation Beth El does not currently have sufficient staffing to realize its programming aspirations. This is most notable in program management and administration. There is currently no program manager and there is insufficient administrative support to allow the most effective use of senior staff. Thus while the use of volunteer-staff-clergy partnership to run our synagogue is a strongly held value, it is also a significant challenge to structure that work so it can be effective. Three conditions must be met to make such a collaboration function over the next five years: 1) staff, clergy and volunteer roles must be well defined; 2) an explicit process of deciding what we will and will *not* do that recognizes that staff time and scarce administrative support required for program implementation; 3) develop a process that supports collaboration and volunteer work through the effective use of technology and takes into account the busy work lives of most congregants; and 4) the ongoing development of lay leaders.

*Clarifying roles of staff and volunteers.* The Strategic Planning Committee created the “Domains of Leadership” diagram below to categorize congregational programs and to help identify areas where volunteer role was key. It is important to recognize that without volunteer leaders, these programs and activities cannot be a regular (or effective) part of congregational life. And, it is important to note, that it is not only the activities themselves that will be lost: without volunteer participation, individual connection to the community is also lost.

The Strategic Planning Committee considered roles and responsibilities of clergy, staff, lay leaders and members, analyzing and prioritizing activities and programs in the context of goals and resources, and arraying them along a continuum from clergy-driven/staff and volunteer supported to volunteer-led/staff and clergy supported as an initial step in optimizing collaboration among all partners. Figure 1 places the high-priority functions identified by staff

and clergy along a continuum from clergy-driven to volunteer-driven functions.

**Figure 1: Domains of Leadership**

<b>Clergy-Driven; Staff &amp; Volunteer-Assisted</b>	<b>Staff-Driven; Clergy &amp; Volunteer-Assisted</b>	<b>Volunteer-Driven; Staff &amp; Clergy-Assisted</b>
<ul style="list-style-type: none"> <li>• Ritual Life — Nursery School &amp; Camp Kee Tov</li> <li>• Music Program</li> <li>• Original Beth El Liturgy &amp; Music</li> <li>• Life Cycle Events</li> <li>• Pastoral Care</li> <li>• <i>Training and Support for Volunteers</i> (e.g. Torah Study, Chevra Kadisha, Service Leaders, Mentors, etc)</li> </ul>	<ul style="list-style-type: none"> <li>• Financial Management (e.g. HR/Compliance)</li> <li>• Early Childhood Education</li> <li>• Camp Kee Tov</li> <li>• Youth Programming</li> <li>• Youth &amp; Family Education</li> <li>• Neighborhood Relations</li> <li>• <i>Volunteer Coordination</i></li> <li>• <i>Buildings &amp; Grounds</i></li> <li>• <i>Communications</i></li> </ul>	<ul style="list-style-type: none"> <li>• Torah Study</li> <li>• Minyan</li> <li>• <i>Chavurot</i></li> <li>• Homeless Meal</li> <li>• Social Action</li> <li>• Jewish Community Relations</li> <li>• Ritual Support</li> <li>• <i>Member Care</i> (welcome, illness, birth, death)</li> </ul>

*Italics denote areas in which leadership resources are insufficient and therefore resources need to be allocated by redistributing work or eliminating a function deemed important.*

While the domains of leadership are articulated, the roles of each partner in each domain must be well defined. We recommend that those seeking volunteers clearly articulate, in writing, exactly what the task is, what resources are available to the volunteer to do the task, and that provisions be made to support volunteers with manuals and training. Those currently performing volunteer functions, working under the auspices of the Board and Program Council should begin to document and archive process manuals for those functions. Board and Program Council should prepare job descriptions for standing leadership role and all of this information should be retained on the synagogue shared drive and available for volunteer orientation and reference.

The Strategic Planning Committee recommends the following actions to develop a robust volunteer/staff/clergy partnership. The recommendations reflect the priorities identified at the June workshop. These recommendations are formatted as a workplan and can be implemented both in the short-term and, more comprehensively, over the next several years. All the recommendations point toward a coherent, transparent relationship between volunteers and staff/clergy, a partnership resulting in well run, wide-ranging congregational programs of all types.

*1. Making trade-offs explicit:* When administrative and program management resources are scarce and money is limited, trade-offs must be made. We cannot do everything. Therefore the staff and clergy, working with the Board and Program Council must create clear criteria for what will be done and what will not and communicate them broadly to congregants who may have

great ideas but no bandwidth for implanting them. For example, the Program Council in consultation with staff and clergy could create a list of criteria that must be met to launch volunteer led program. Staff, when looking at the annual program plan, are responsible for assessing whether or not we have the resources to do the work that proposed and to recommend the appropriate course of action. The Board and Program Council then are responsible for communicating to the congregation the plan for the year, including the constraints.

*2. Supporting collaboration.* Much important volunteer work is administrative and organizational—work made much easier by technology. Individual volunteers can do more if advanced communications technology is in place. The importance of establishing this technology cannot be overestimated in developing an effective volunteer/staff partnership.

A number of administrative tasks may be so important (for example, thanking donors, arranging meals and/or rides, managing regular events, others as identified by the Board) that paid staff should prioritize these over other work. (These tasks are critical support of the community—define the community--and must be done until a functioning volunteer network is in place.)

Volunteer support and coordination is a task that must be shared by staff and volunteers. Thus a Board of Director should be designated to work with staff on developing a volunteer coordination strategy that can be implemented within available resources.

*3. Develop leaders.* Beth El has no formal leadership development program. The Congregation should prioritize participation in URJ and other Jewish leadership programs. The Congregation should use internal resources (member experts) to train members. Recruitment should be a key responsibility of leaders and current volunteers; but it is also important to develop activities open to members who self-identify. Beth El needs to establish multiple paths to leadership with the goal of defining volunteer staff partnerships appropriate for varied program envisioned for 2020.

## Implementation Timeline 2011-2015

Year	Action Steps	Measures of Success
2011	<p>Board designates a director to oversee volunteer engagement</p> <p>Sr. Staff , Clergy and Board agree on must have functions and staffing</p> <p>Exec Dir determines hours per week of staff time required to support administrative functions related to volunteer –staff collaboration &amp; programming and allocates available resource</p> <p>Launch Web Tool to support collaboration, including assessing needs and creating work plan and implementing plan. Done by existing communications committee</p> <p>Begin design and launch leadership development program for governance &amp; service leadership<sup>8</sup></p> <p>Program Council and Board draft and Board approves committee chair job descriptions, director job description, and committee roles and responsibilities.</p>	<p>Director named to fulfill role by February 2011</p> <p>Final domains of leadership approved by Board. Agreement of what will and will not be done due to staffing/volunteer deficits will be codified in annual work plan.</p> <p>Staff member who will fulfill this function identified by February 2011 and role clearly defined</p> <p>Web tool that allows volunteers to know of opportunities, apply for them and/or sign up online, and communicate with one another and staff on status of projects is launched by Q2 2011</p> <p>A plan for leveraging existing community resources to supply leadership training is approved by Board by Q2 2011. 10 congregants, drawn from existing leaders and from community at large are participating in leadership programs by year-end.</p> <p>Job and committee descriptions written and on file in Main office and distributed to staff and volunteers, and available in online volunteer resource center.</p>
2012	<p>Increase staff time for administrative support sustained</p> <p>Web tool enhanced to support more volunteer collaboration and administrative functions</p>	<p>All volunteers are thanked in a timely way, a well known and reliable process is in place for handling administrative requests for things not yet supported by web tool (e.g. mailing lists).</p> <p>TBD based on overall web tool plan. Should support a wide variety of sign ups</p>

<sup>8</sup> Governance = board and program council leadership, while Service leadership refers to ritual functions like shiva minyan or organizing chanters etc for HHDs.

	<p>Leadership development program for governance expanded</p> <p>Service leadership development designed and launched with goal of expanding ranks of congregants able to help lead and organize and/or support ritual functions such as shiva, weekly Shabbat services, and HHD chanting etc</p> <p>Complete manuals for committees and major functions like Gala, Bazaar etc</p> <p>Design and deliver annual training program for leaders</p>	<p>for volunteer opportunities and collaborative efforts</p> <p>20 congregants participate in leadership development program</p> <p>Participation meets threshold established by program plan</p> <p>Complete manuals on shared drive, delivered to volunteer leaders and on file in library of office</p> <p>Board and Program Council members complete training by July 1 2012</p>
2013	<p>Plan and implement volunteer opportunity and recognition fair to publicize opportunities and thank volunteers</p>	<p>Volunteers are self identifying and bench strength of future leaders includes potential nominees for leaders and the next generation participates on key committees</p>
2014	<p>Evaluate volunteer program identify strengths and weakness of volunteer program at Beth El and drive improvement</p> <p>Plan enhancements</p>	<p>60% of volunteers participate in evaluation and plans for improvement are presented to and approved by Board</p> <p>Plan for enhancements approved for 2015 implementation</p>
2015	<p>Enhancements implemented</p>	<p>TBD</p>

## **Strategy #4: *Improving communications inside and outside our community***

The issues discussed by the Communications Committee are believed to interfere with or impede our goal of achieving the establishment of a community in which members feel connected, engaged and committed. They began with the following questions: What are the most effective means of enhancing communication at Beth El? How well are we letting our congregants know our needs, or even asking for help? How well are we giving them opportunities to volunteer and step up, to learn what is going on here, or engage with other members? Are we effectively using existing communication vehicles to build community? Should we revise our current communication strategies and introduce new ones?

Based on discussions with staff and committee members, the following set of goals and priorities emerged.

### *Specifying Communication Goals:*

- All communication strategies should work towards building community, engaging members in synagogue life, and increasing commitment
- Communications about program opportunities and about all members of the community should be timely and engaging
- The management of all aspects of communications should be systematic and comprehensive
- Technology, which is vital to supporting effective communications, should be supported by a state-of-the-art database as well as a highly engaging and effective website

### *Major Priorities:*

- Redesign the e-update to a shorter version that seamlessly leads the user back to the Beth El website for program details, registration information, news, etc.
- Develop a phone-tree “buddy” system of volunteers who assume the weekly responsibility of calling “off-line” senior members with the e-update news and details
- Redesign *The Builder* to be considerably shorter, emphasizing the calendar and events, acknowledgements of gifts, and has content about members written by members, and supported by an editorial committee composed of staff and members. In the interest of streamlining *The Builder*, the benefits of adding pages to the publication with advertising need to be weighed.
- Create a system that promotes hearing from the clergy on a regular basis (through weekly messages, podcasts, etc)
- Develop an online membership directory (with photos)

- Develop a “name-tag culture” in which all board members and program chairs wear permanent name tags at all public events, and in which it is expected that all gatherings provide a sufficient number of disposable name tags available for all participants
- Introduce a URJ model Caring Communities program that helps the congregation and clergy know about and acknowledge milestone and significant life events in members’ lives
- Establish a Communications Committee that is linked to the Membership Committee, and that addresses issues of marketing and branding (e.g., develops a membership brochure)
- Create an encouraging, welcoming atmosphere for interfaith families and Jews-by-Choice by developing programming specifically designed to promote inclusiveness and gentle education for both the Jewish and non-Jewish partner based on the URJ Project Welcome

### Implementation Timeline 2011-2015

Year	Action Steps	Measures of Success
2011	Form and maintain a Communication Committee and four key subcommittees: -marketing and branding -website -membership and volunteer database -clergy communications system	Functioning Communication Committee as indicated by regular meetings and the collection of data on the effectiveness of action steps (e.g., surveys of congregants, usage rates for on-line outreach efforts)
	Develop on-line membership directory (with photos and bios)	Membership directory that includes photos and bios is up and running, used at least once per year by members, and receives approval rating of 85%
	Redesign the website	Dynamic new website unveiled that has increased monthly hits by 50% for congregants, by 50% for the broader community, and is highly valued by congregants 75% of users
	Create a congregation –wide “name-tag” culture	Name tag culture has taken hold as indicated by increased requests for name tags at events/services, 75% approval rating of congregants and by evidence of Board members wearing their permanent name tags at most events
2012	Maintain a Communication Committee and four key subcommittees: -marketing and branding -website -membership and volunteer database -clergy communications system	Functioning Communication Committee as indicated by regular meetings and the collection of data on the effectiveness of action steps (e.g., surveys of congregants, usage rates for on-line outreach efforts)

<b>Year</b>	<b>Action Steps</b>	<b>Measures of Success</b>
	Redesign The Builder (format and distribution)	Streamlined production of The Builder emphasizing synagogue calendar/events and donations that is managed by an editorial committee of staff and congregants (bi-monthly meetings)
	Develop and implement marketing/branding plan in conjunction with the Membership Committee	Synagogue stationary, publicity and membership packets for the synagogue incorporate the synagogue's new marketing and branding approach, including a newly designed membership brochure that is also located in multiple locations in the building
	Design and construct a space in the building for communicating synagogue history, vision and mission	Installation of historic photographs (either digitally or as an exhibit), as well as a visual display in the Gallery of Beth El's mission/vision
<b>2013</b>	Maintain a Communication Committee and four key subcommittees: -marketing and branding -website -membership and volunteer database -clergy communications system	Functioning Communication Committee as indicated by regular meetings and the collection of data on the effectiveness of action steps (e.g., surveys of congregants, usage rates for on-line outreach efforts)
	Redesign E-update	There is a dynamic relationship between the E-update and Beth El webpage, as indicated by the fact that all E-update items link back seamlessly to the website page for in-depth information
	Institute Clergy Information System (IS) that promotes messaging (output) and congregational surveys (input)	Congregants perceive themselves as being knowledgeable about clergy ideas and issues facilitated by online communication systems that may include podcasts or online messaging. Monthly clergy-designed single-question congregational surveys (online) provide clergy with input regarding congregational needs/preferences
	Implement a model Caring Communities program (based on URJ model)	The majority of congregants are aware of and value the program as an example of Beth El's strong commitment to caring for each other
<b>2014</b>	Maintain a Communication Committee and four key subcommittees: -marketing and branding -website -membership and volunteer database -clergy communications system	Functioning Communication Committee as indicated by regular meetings and the collection of data on the effectiveness of action steps (e.g., surveys of congregants, usage rates for on-line outreach efforts)

<b>Year</b>	<b>Action Steps</b>	<b>Measures of Success</b>
	Develop phone tree for reaching congregants who are not on-line (e.g., seniors)	80% of seniors are reached by the phone tree within four hours of initiating the process
<b>2015</b>	Maintain a Communication Committee and four key subcommittees: <ul style="list-style-type: none"> <li>-marketing and branding</li> <li>-website</li> <li>-membership and volunteer database</li> <li>-clergy communications system</li> </ul>	Functioning Communication Committee as indicated by regular meetings and the collection of data on the effectiveness of action steps (e.g., surveys of congregants, usage rates for on-line outreach efforts)
	Design next 5 year communication plan	New communication plan for the next five years is approved by the Board

## **Strategy #5: *Expanding our investment in programs***

There is a need to make programming for all ages an organizational priority. The goal of enriching programming is to engage our members in different activities that are meaningful to them, thereby creating a stronger community and stronger bonds to that community. Of all the strategies proposed in this plan, programming provides the most visible mechanism for addressing the interests of members and promoting community involvement, including attracting new members.

The most immediate need to reach the programming goal is to create an annual integrated program planning process. Annual program planning would take place in the Spring of the previous year and reflect programmatic goals for the year. It would be supported by an integrated calendaring process that would help members and staff set dates for major synagogue events and understand how activities affect other activities, the staff workload and the community as a whole. Given the wide range of programming already in motion throughout the year, integrated programming is essential for allocating resources, anticipating attendance, and coordinating with other institutions in the Jewish community so that our programs succeed.

We need to build upon our significant staff investments in programs for children, youth and families (pre-school, Youth & Family Education, KeeTov, B'nai Mitzvah, youth groups and Midrasha) to build lay-led programming for adults that engage members and families (beyond Torah Study, annual family retreat, social action projects and periodic trips to Israel). While youth programs are all staffed from informal education to Kee Tov, there is no program staff to support adult programming other than religious services and chorus. This significant deficit can be addressed, in the short term, by amplifying the role of the Program Council and lay leadership working in collaboration with staff and clergy.

### Role of Program Council

To ensure the integrity of Congregation Beth El programs, the Program Council needs to provide guidance and support to program committees as well as facilitate volunteer involvement and recognition. By serving as a conduit for the voices of our members on programming the Program Council can play a role in developing leaders by:

- Ensuring integrity of Congregation Beth El programs
- Review and approve proposed lay-run programs to ensure that they are consistent with mission and vision, have adequate volunteer participation, have realistic expectations of professional staff and clergy, and don't conflict with other events; provide guidance to program teams on everything from program content, marketing to staffing, and follow-up; ensure cross-program collaboration to increase success and efficient use of resources. This includes saying, "No. We cannot do it right now. We do not have the staff and there does not seem to be enough volunteer support to

succeed.” Ultimately, the Program Council would be instrumental in planning the annual lay-led program and ensuring that it is integrated with staff and clergy led programs.

- Provide guidance to program committees
  - Craft charters for program committees and prepare job descriptions for program committee chairs and present to Board for approval. Create event planning template designed to ensure all aspects from pre-event to follow-up are adequately provided for. Facilitate leadership development for program committee chairs (e.g. invite URJ staff to lead workshop or nominate committee chairs to attend trainings held elsewhere; scan available resources and make them available to committee chairs.) Facilitate volunteer involvement and recognition.
- Work with staff and clergy to develop an annual programming timeline such as:

January	Solicit program plans for coming program year (fall –summer)
May	Finalize program plan, preview with Board, and announce annual program
June	Orientation of new program chairs
Monthly	Review program plans/results
Ad hoc	Review program proposals that arise for opportunities that were unforeseen and approve/recommend implementation, or not
Quarterly	Agenda is leadership development based
Bi-Annual	Develop program portion of member survey

If money were available, the Program Council could provide funding for programs based on how well they support mission/vision and annual goals (e.g. a social action program that fostered collaboration across ages, made Jewish values evident, and built community recognition for Congregation Beth El might get extra publicity support).

Some of the methods for increasing the importance of integrated programming as an organizational priority include:

- Conduct annual survey of existing programs to inform the process of program improvement
- Develop an information archive to orient new program chairs (how-to manuals, etc)
- Make more active use of website to promote programs well in advance
- Develop marketing strategy for all programs using social networking and online resources
- Involve the Program Council in linking program committee chairs with the volunteer coordinator to help implement programs
- Build volunteer skill bank and support volunteer recognition
- Make greater use of URJ resources for identifying promising practices related to:

- Building a Caring Community: Families (marriage, sacred aging, etc), Disabilities (special needs), LGBT inclusion, Health and wellness, Economic concerns, Hospital visitation and other links between congregants with expertise and congregants in need
- Inter-faith programming: Learning about Judaism, Role of grandparents, Marriage issues, Conversion, etc.

In order to translate one or more of these ideas into realistic programming, considerable attention needs to be given to recruiting a program director. In the meantime, some of these ideas for lay-led programs will need to rely on the talents, dedication, and creativity of synagogue members with the limited support of staff.

### Major Recommendations

- 1) Revitalize the focus on programming in ways that bring members and non-members to synagogue.
- 2) Implement an annual program planning process that integrates staff led and lay led programming and is facilitated by a calendaring process that advances our goals and schedules events in a complementary way to maximize participation, efficiently uses our resources and does not compete with other community events.
- 3) Continue to enhance youth programs by building quality in those programs and by ensuring that they link adults to meaningful experiences for themselves.
- 4) Foster interest-based programming for adults by implementing an annual survey to assess those interests.
- 5) Make it a top priority to hire a part-time program director within the next three years. In the absence of a program director, the executive director would assist the Program Council Chair with the program planning and calendaring process.
- 6) Create a position on the Program Council for the Volunteer Coordinator who represents a volunteer management committee
- 7) Assess the current structure and function of the Program Council, including reviewing the structure stipulated by the Bylaws and recommending changes if needed.

## Implementation Timeline (2011-2015)

Year	Action Steps	Measures of Success
2011	Develop integrated program plan & calendar	Calendar in place Fall 2011
	Review structure and function of program council and assess bylaws provisions	Report back to Board and recommend changes if necessary
2012	Review URJ Programming Resources to prioritize program planning	Launch Caring Community & Adult Programming in Fall 2012
2013	Design and implement Program Director role	Program Director in place by Fall of 2013
2014	Expand Adult and Family/Youth Programming	Five new adult programs and two family/youth programs launched with high community visibility
2015	Launch planning for next strategic plan	Evaluations completed on all existing programs

### Conclusion

At the end of this plan is a brief history of the congregation. In addition there are a series of reports in the form of Appendices that capture many of the ideas and information gathered by the various members of the strategic planning committee. They are included to provide guidance for those implementing various segments of the plan and members of the strategic planning committee welcome the opportunity to share these ideas with others as the implementation process unfolds. The Board of Directors and the Program Council need to play leadership roles in facilitating the implementation of the strategic plan over the next five years.

## *A Leap of Faith: A Brief History of Congregation Beth El*

*He-avar hu ma-vo  
The past is prologue*

Congregation Beth El was founded during the 1940s at a time when being Jewish in Berkeley meant having limited choices. The only Reform synagogues were in San Francisco or Oakland. There were two Jewish organizations in Berkeley; the B'nai B'rith Lodge and the Hebrew Center, started by a small group of orthodox men who played poker together. Whenever a sufficient number of players showed up to form a minyan, the group held services. The Berkeley Jewish community grew dramatically after World War II with the influx of European émigrés.

### **In the Beginning**

Congregation Beth El grew out of a simple question raised by a small group of friends in 1944: “Isn’t it time for a city the size of Berkeley to have a reform Jewish congregation?” The group included Rabbi Joseph Gitin (then Berkeley Hillel’s Rabbi) and Rosalie Gitin, Dr. Alexander Levens (then professor of mathematics and Vice Chancellor for Students at UC Berkeley) and Ethel Levens, Bob and Ruth Fischer, and Raphael and Frieda Silver. The four couples did not realize that their question would become the foundation for establishing Congregation Beth El.

The founding group decided to assess the interests of the community by convening an exploratory meeting of Berkeley’s Jewish residents—but how to reach them? Fortunately, Bob Fischer was the current secretary for the B’nai B’rith Lodge with access to the only available list of Berkeley Jews. Since most of the names on the list were Berkeley merchants, the conveners scheduled a meeting after the busy winter holiday season in January 1945.

The response to the community-wide invitation was stunning with nearly 100 people attending the Odd Fellows Hall next to the Hotel Shattuck (now called Hotel Shattuck Plaza). The meeting generated an outpouring of enthusiastic support and offers of books. Most significantly, about 65 individuals made monetary pledges.

The new congregation called itself Temple Beth El and held its first services, in 1945, at the First Unitarian Church on Bancroft. With strong support of its pastor, The Reverend Raymond Cope, the new congregation was given free use of the building for five years. During this period High Holiday services were held at The Twentieth Century Club on Derby Street.

The congregation also benefited from the support of Rabbi Gitin as its first spiritual leader and volunteer leader since there were no funds to pay him. Rabbi Gitin's warm personality and informal ways were highly valued by the members of the young congregation. Robert Fischer liked to tell the story about Rabbi Gitin's interpretation of 1940s Reform Judaism. "He made religion palatable. He wasn't a strict conformist. I remember how on *Rosh Hashona* afternoon we played poker at his house. He said that Yom Kippur was the sad holiday. *Rosh Hashona* was the happy one and we should have fun after we go to services."

From the beginning, Beth El faced significant challenges including the dilemma of whether to use the limited funds to hire a rabbi or construct a synagogue. The fledgling congregation was soon forced to do both when Rabbi Gitin left to serve a congregation in Stockton, California. Rabbi Leo Trepp took his place in 1947, becoming Beth El's first salaried rabbi. A recent Holocaust survivor, Rabbi Trepp had been imprisoned in Sachsenhausen, near the main concentration camp for Berlin. During his three-year-term he helped the congregation integrate the sizeable émigré population along with those families having lived in Berkeley decades earlier.

At about the same time Rabbi Trepp arrived, the congregation began planning for the construction of its own building and purchased the site at the corner of Arch and Vine in 1950. On March 11, 1951 the building was dedicated as Temple Beth El and Community Center. The name reveals how the congregation viewed itself as both a spiritual home and a center for Reform Jewish life.

Since the first service held in 1945, it took a full six years to build a membership of 120 families. No one foresaw that the synagogue would reach its capacity of 250 families in the next 25 years. In 1958 the adjoining land was purchased for a classroom building and dedicated in 1960. Not everyone in the congregation approved this rapid expansion. However the significant growth in the Jewish community eventually validated the wisdom of this risk.

The increasingly diverse spectrum of belief in the Jewish community, from Orthodox to Reform Judaism, was another major challenge. Congregants felt strongly about the importance of meeting the needs of this diverse community. The idea was so important to the founders that the preamble of the by-laws noted that even though this was a Reform congregation there was a deep respect for tradition, such as having the requirement to wear a *yarmulke* and *tallit* when participating on the *bima*. On the other hand, new practices were included, such as having unassigned seating at the High Holidays.

A copy of the Articles of Incorporation of Congregation Beth El, filed in 1945 reveal how the synagogue viewed its mission in the early days. It lists the following purposes:

- The promotion of religious, educational and charitable purposes according to the doctrines and teachings of the Jewish faith

- To purchase, acquire and hold suitable real estate to carry out the purposes for which this corporation is formed, and to purchase acquire, and hold suitable real estate for the burial of the dead.
- To create a perpetual care fund for the future care, management and supervision of the cemetery.

One key to Beth El's ability to build a new synagogue and add new classrooms nine years later was the willingness of congregants to donate large amounts of money. Direct appeals were usually met with a generous response. Despite these successes, the synagogue faced neighborhood opposition to expanding in a residential area. Concerns primarily centered on parking and traffic. In addition to substantial efforts to address their concerns, Berkeley's Mayor Lawrence Cross (also pastor of the Northbrae Community Church) publicly and enthusiastically supported the development of the new building.

The early founders of Beth El viewed their work less as an act of courage and more as an exercise of youthful exuberance guided by a core set of values. As founder Bob Fischer stated, "We cared about being Reform Jews and building a synagogue was a reflection of those values. We did what we felt was best at the time."

### **Rabbinic Leadership**

While the founders had the courage to build a congregation and physical space where nothing existed before, the selection of the first salaried rabbi began an ongoing search for spiritual leadership. Each time the congregation initiated a search for a spiritual leader they would answer questions about the type of leadership needed for the congregation at that time in the lifecycle of the organization.

Over the 65 year history of Congregation Beth El, there has been an impressive array of rabbinic leadership, each bringing their unique talents. Even though its roots are clearly in the Reform movement, there were times when the congregation was drawn to rabbis with more traditional conservative and orthodox roots. While some reflected a strong commitment to the education of children and youth, others were more comfortable as scholar-rabbis. While some rabbis emphasized innovation and change, other emphasized tradition and observance. All have benefited from the talents and passions of a vibrant and creative membership. The following rabbis have contributed to the identity and culture of the congregation today.<sup>9</sup>

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<sup>9</sup> Over the years, as rabbis took sabbaticals or when the congregation was in the midst of searching for a rabbi, interim rabbis filled in. These include: Raphael W. Asher (1980-81), Gary Tishkoff (1900-91), Sam Braude and Shelley Waldenberg (1994-95).

**Rabbi Joseph Gitin** (1945-1947) was the founding rabbi who volunteered his part-time services and leadership during the congregation's first years.

**Rabbi Leo Trepp** (1947-1950) arrived from Germany after the war and helped the community welcome the influx of war-time émigrés

**Rabbi Sidney Akselrad** (1951-1962)—reflected a strong adherence to the core Jewish values of social justice and guided the congregation through the McCarthy anti-communism era and the early days of the civil rights movement. He was a founding member of the Berkeley Ecumenical Council of Clergy and marched with Reverend Martin Luther King in Selma in 1965.

**Rabbi M. Arthur Oles** (1963-1966)—instituted Saturday Shabbat services at Beth El (until then, services were only on Friday night).

**Rabbi Arthur Abrams** (1966-1970) supported the congregation's effort to establish a nursery school with a philosophy of a play-based, developmental program focusing on the whole child. Camp Kee Tov also began during this period with congregational support and leadership, primarily from the Schnur family. Kee Tov began with about 100 campers, built on the same traditions of ruach (spirit) evident today.

**Rabbi George Vida** (1971) was an interim rabbi who loved his year at Beth El so much that upon his retirement, he and his wife Emmie moved back to Berkeley and promptly joined Congregation Beth El. As a scholar-in-residence he served as a mentor to many congregants and provided valued leadership in the Shabbat morning Torah Study along with Emmie. In 1981, the congregation's library was named after him. In 2010 the reference section of the library in the new synagogue was rededicated as the "Rabbi George and Emmie Vida Reference Library."

**Rabbi Leo Abrami** (1971-1976) reflected the scholarly approach and introduced more traditional practices, in consonance with Reform Judaism's general movement during this period. It was during his tenure that the Beth El Torah Study began with Marian and Albert Magid studying together in the synagogue prior to services. Congregants soon joined them, listening, discussing and growing closer. Within two years congregants were taking turns in presenting the drashot (interpreting and unraveling the meaning of the weekly Torah portion) and had become so numerous that soon they convened in the downstairs library.

**Rabbi Arnold** ("Avi") Levine (1976-1994) brought youth, energy and innovations to the services, raised expectations for Bar Mitzvah students and supported the new regional Midrasha (high school) program. His own two-year-old became a member of the newly formed Gan Katan class (ages 2-3), adding a third grouping to the already established

Aleph (ages 3-4) and Bet (ages 4-5) classes. During Rabbi Levine's tenure, the Homeless Meal program was launched by a group of dedicated volunteers as a stop-gap measure until people found housing, jobs, got food stamps or other assistance.

**Rabbi Ferenc Raj** (1995-2007) fulfilled the congregation's desire for a senior scholar who would combine teaching and spiritual leadership. Recognizing the range of congregants' reform spiritual needs and wanting to offer choice, he introduced two different siddurim (prayer books) for the High Holidays. He strongly supported Marianne Magid and Dan Magid in their effort to initiate a Shabbat morning minyan (in 1998) prior to Torah Study as well as their crafting of a traditional siddur for the minyan. He also promoted outreach to the African-American community as a way of annually celebrating the birth of Reverend Martin Luther King, Jr. He helped the congregation manage the significant transition from Arch and Vine to the new synagogue on Oxford St.

**Rabbi Yoel Kahn** (2007- present) brought his scholarly interest in prayer to revitalize the congregation's siddur as he laid the groundwork for creating a learning community with new senior staff, and a call for the Congregation's first strategic plan.

When Rabbi Kahn became Congregation Beth El's spiritual leader in 2007 he inherited an impressive range of programs, many of which not only originated with congregational support, but have expanded greatly over the years. Today the nursery school which began with one classroom of mixed ages is filled to capacity with 64 children and 10 staff. Camp Kee Tov, which began with 100 campers enrolls over 700 campers supported by 90 counselors, most of whom were campers themselves. The monthly Homeless Meal program serves 200 guests staffed by a crew of 40 volunteers, and backed up by an email list of 300 volunteers, a medical clinic and other social services. Midrasha today serves 160 teens, with 16 staff and includes students from Alameda, Contra Costa and San Francisco (including Sha'ar Zahav since 1993) Counties. The Shabbat Minyan continues today with around 30 participants, while Torah Study enjoys an attendance averaging 45 participants.

One of the oldest lay-led activities at Beth El, dating from 1946, is the gift shop which was founded by the first Sisterhood President, Sidie Fried. The "shop" consisted of a card table set up in the synagogue with a display of aprons made by Sisterhood members. Today the gift shop, under the long-standing dedication of Odette Blachman (a founder of Beth El) and Robinn Magid, generates significant revenue for the synagogue. As a nod to the shop's humble beginnings, the shelves are always stocked with aprons. While the Sisterhood and Brotherhood date from the earliest days of the congregation, the Sisterhood became the Women of Beth El (currently inactive) and the Brotherhood continues to the present.

Throughout the years, rabbinic leadership and congregants have interacted with the larger community in several ways, from building our spiritual home to connecting with other faith-

based communities. This connection became particularly important during the construction of the two synagogues.

### **Our New Home**

The first construction event in the life of the congregation was building the synagogue at Arch and Vine and its subsequent addition. Next was the decision to build a larger home that would accommodate a growing membership as well as serve a larger portion of the East Bay Jewish community.

The story of the move to Oxford Street in 2005 reflects a great deal about the congregation's history as well its optimistic outlook for the future. Just as the construction of the original building in 1951 was an act of faith, so too was the construction of the current synagogue designed to serve 700-plus families.

In 1999 Congregation Beth El had the unusual opportunity to purchase land from the Chinese Alliance Church at 1301 Oxford Street, a few blocks from Arch and Vine. During the next five years the congregation devoted nearly all its energies to fundraising, community outreach, public hearings, zoning issues, architectural planning and construction. The building process and delays paralleled the earlier experiences at Arch and Vine related to neighborhood concerns about parking, traffic and the impact on the surroundings. The delays in constructing the current facility led to significantly increased building costs.

Despite these challenges, on September 9, 2005 congregants proudly carried the precious Torah scrolls through the neighborhood to a beautiful and inspiring new home. The unique design of the building reflects sensitivity to the concerns of our new neighbors (e.g., parking and noise), while presenting a visually inviting entry, and attention to environmentally-sound best practices. In the spirit of Tikkun Olam (repairing the world), the building reflects this idea through the creation of the first geothermal heating system in Berkeley, the restoration of the open portion of the creek, the planting of evergreens around the site perimeter for the privacy and noise concerns of our neighbors, and the achievement of the highest green standards.

Every part of the synagogue was designed to generate a sense of community and togetherness. In the Arch and Vine site, community was a vital aspect of its existence despite cramped, dark, dead-end corridors and a lack of a significant relationship between the building and landscape. In the new building, each entry is a welcoming experience, where light and the outdoors interplay with social, spiritual and educational aspects of synagogue life. A primary goal of the building was to ensure Beth El's continuing role as a vital and welcoming community for generations to come.

The new synagogue also serves as a constant reminder of the past. The original mahogany paneling from the old Vine Street location was lovingly recycled to create the ark and *bima* furnishings. The copper doors that once welcomed congregants to the Vine street location are set on a wall near the entry to the synagogue. The original stained glass rosette from above the copper doors in the Vine Street synagogue has been incorporated into the interior of the synagogue. Its motto over the doorway of the Vine Street synagogue, “*Tzedek, Tzedek, Tirdov*” (Justice, Justice shall you pursue”), continues to be at the core of congregational values.

The congregation is also the caretaker of two Holocaust Torahs, from the Czech Trust. One from Tabor, in the former Czechoslovakia was requested by Rabbi Abrami and the other from the town of Kladno, in the former Czechoslovakia, was requested by Rabbi George and Emmie Vida. These scrolls are on perpetual loan from the Czech Memorial Scrolls Trust of London, England.

### **Historic Site**

The Oxford Street location has its own unique history, captured in an abbreviated form on a landmark plaque that Congregation Beth El designed in cooperation with the Berkeley Architectural Heritage Association (BAHA).

The site where Beth El now stands once housed the home and gardens of Napoleon Bonaparte Byrne who moved his family and two freed slaves from St. Louis shortly after the Civil War. The freed slaves were among the first African American residents of Berkeley. Byrne completed his 18 room Italianate home in 1868 which was placed almost exactly where Beth El stands today. His wife Mary, an avid arborist, imported trees for the land, some of which remain on the premises to this day. In the late 1870's, Henry B. Berryman purchased the house and surrounding land. After the Berrymans sold the property around 1900, the house and grounds began a century of slow decline.

The Chinese Alliance Church bought the property in 1950 and built a cinder-block church on the land in 1952. The Byrne mansion had fallen further into disrepair, but after it became an official city landmark, funds were raised to restore the building. Unfortunately, the mansion was completely destroyed by fire shortly after a second renovation in the 1980s and lost its landmark status. At this point the Chinese Alliance Church rented the land to community gardening groups who remained until Congregation Beth El broke ground for its new home.

The congregation's commitment to preserve significant historical elements of the site can be seen today by the presence of the original Oxford entry way, the ornamental metalwork on top of the western fence, the Oxford Street retaining wall, and the preservation of most trees and plants that were native to the site, including the Monkey Puzzle Tree next to the nursery school.

## **Rabbis**

Joseph Gitin (part-time 1945-1947); Leo Trepp (1947-1950); Sidney Akselrad (1951-1962); M. Arthur Oles (1963-1966); Arthur Abrams (1966-1970); Leo Abrami (1971-1976); Arnold Levine (1976-1994); Ferenc Raj (1995-2007); Yoel Kahn (2007 - present)  
Interim Rabbis: Alfred Barnston (1962), George Vida (1971), Raphael W. Asher (1980-1981), Gary Tishkoff (1990-1991), Sam Braude & Shelley Waldenberg (1994- June, 1995)

## **Cantors**

Flori Monroe Baranco (1945); Robert Rose (1958- 1965, approx.); Ben Roth (1965-1985, approx.); Cory Winter (1985- 1988); Brian Reich (1988- 2008); Reuben Zellman (2009 - present)

## **Organists**

Laurette Goldberg (1945); Rose Friedman (1958); Rose Rust (1965)

## **Past Presidents**

William Blackfield (1945-47); Harold Edelstein (1947-48); Samuel Goldeen (1948-49); Rafael Silver (1949-50); Phillip Feiger (1950-52); Maurice Moonitz 1952-53; Samuel Goldeen 1953-54); Sidney Hoos (1954-57); Manfred Finkel 1957-59); Leon Klugman (1959-62); David Golner (1963-64); Leon Klugman (1964-66); Fred Meyer (1966-68); Sami Hassid (1968-70); Fred Meyer (1969); Elmer Grossman (1971-72); Joel Zebrack (1972-74); Alfred Goldschmidt (1974-75); John Goldsmith (1975-77); Marian Magid (1977-79); Lawrence Levine (1979-81); Robert Katz (1981-83); Arthur Goldman (1983-84); Frances Alexander (1984-87); Bill Berland (1987-89); Lois Marcus (1989-91); Thom Seaton (1991-93); Andy Ganes (1993-95); Stephen Joseph (1995-97); Harry Pollack (1997-99); Stuart Berman (1999-2001); Buddy Warner (2001-03); Martin Dodd (2003-05); Julie Kennedy (2005-07); Katherine Haynes Sanstead, (2007-09); Joanne Backman (2009- present)

## **Founding Members (as remembered by Odette Blachman & Bob Fisher)**

Maurice and Ruth Adler; Kurt and Gay Austin; Prof. Percy and Ruth Barshay; Ben and Sally Berke; William and Cecilia Blackfield; Max and Odette Blachman; Sam and Phyllis Blachman; Roy and Edna Bloch; Prof. Boris and Joy Bressler; Ed and Pearl Brosler; Blanche Cardwell; Prof. Israel and Evelyn Corner; Benjamin and Frances DeRoy; Simon Exkstein; David and Marie Edelstein; Harold and Marian Edelstein; Harold and Gertrude Ellis; Dr. Philip and Ilse Feiger; Manfred and Vera Finkel; Robert and Ruth Fischer; Morris and Isabel Freifeld; Morris and Rose Friedman; Dr. Nat and Libby Frug; Samuel and Doris Goldeen; Rudolph and Elizabeth Goldschmidt; Harold and Fran Goldstein; Emile and Irene Grossman; Ernst and Herta Hessing; DR. Brian Hilton; Fred and Ruth Hirsch; Fred and Carolyn Kahn; Julius and Gerda Kauffman; Joseph and Anna Kay; Prof. Alex and Ethel Levens; Sam and Kitty Levy; Elliot and Ethel Lewis; Dr. Julius and Emmy Lewis; Dr. Robert and Sylvia Lewis; Rebecca Lubin; Ben and Mollie Malik; Dr. Henry and Gertrude Mankin; Rafi and Tuaba Mayeri; Prof. Maurice and Ruth Moonitz; Burrell and Sally Rubenstein; Dr. Fritz and Greta Schmerl; Sol and Rose Seldin; Max and Bianca Shulster; Rafael and Frieda Silver; Friedrich and Edith Strauss; Moritz and Lilli Strauss; Paul and Dorothy Traum; Hugo and Frances Wolf; Dr. Henry and Sandra Yaffe; Chester and Ann Zeff

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Compiled by Susan Austin, with assistance from Robinn Magid and Rabbi Yoel Kahn, using the following sources:

- original documents (early **Builders**, dedication programs booklets, board minutes)

- interviews with founders Robert Fisher, Odette Blachman, past presidents (Frances Alexander & Lois Marcus), current Beth El program directors of Kee Tov and Nursery School
- extensive research on the synagogue from the files of Robinn Magid
- material on the construction of the Oxford site provided by Alex Bergtraun

Appendices:  
Congregation Beth El Strategic Plan

Appendix A: Executive Summary

Appendix B: Membership

Appendix C: Financial Stability

Appendix D: Volunteer/Staff Partnership

Appendix E: Communications

Appendix F: Programs

Appendix G: Facilities & Grounds

Appendix H: Vision 2020

## Appendix A:

# Strengthening Our Community: A Strategic Plan for Congregation Beth El (2011-2015)

## Executive Summary<sup>10</sup>

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### Why a Strategic Plan?

Strategic planning provides a framework for carrying out our mission and acting on our values, developing goals and strategies that are responsive to changes in our environment, making choices about how we spend our resources, developing our capabilities, and helping us adapt to unforeseeable circumstances.

### How was the Strategic Plan developed?

A committee of fifteen congregants, supported by senior staff and clergy, explored key issues to create a multi-year Strategic Plan in a series of meetings held from February to June, 2010. Broad congregational participation was facilitated by announcements in the eUpdate, a series of public sessions, and an email forum (at bethelspg@googlegroups.com). Professional staff and volunteers were interviewed and surveyed by members of the Strategic Planning Committee in the following areas: *Mission, Vision & History, Membership, Revenue Model, Programming, Staff & Volunteer Roles, Communications, and Space Utilization.*

### What has been the result of this Strategic Planning Process?

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<sup>10</sup> The full draft Strategic Plan (with appendices), numbering almost ninety pages, includes additional background, detail and information about the process and recommendations summarized here and is available as a PDF on the website. The intent of this five-page Executive Summary is to capture key concepts and insights from the full Plan.

The results of the planning process include: a revision of Congregation Beth El's mission statement with special attention to the key values that guide us, the creation of a vision statement to articulate the future we desire for our community, and a set of five strategies and recommendations for implementation that include: 1) strengthening our lay-professional partnerships, 2) expanding membership retention and in-reach, 3) building financial stability, 4) improving communications, and 5) enhancing our investment in programs.

### **Mission Statement -- Congregation Beth El**

Founded in 1945 by small group of Berkeley families, many of whom traced their roots to Eastern and Western Europe, Congregation Beth El is a liberal, Reform congregation committed to building and sustaining a caring synagogue community by:

- Welcoming Jews of all backgrounds (ages, abilities, sexual and gender orientation, and levels of observance) and involving them in creating a sacred community, *kehillah kedoshah*;
- Encouraging innovation to sustain Jewish spiritual life while honoring Jewish traditions and respecting the diversity of Jewish practice;
- Celebrating the diversity of our members and community with the belief that each person is made in God's image, *tzelem elohim*;
- Encouraging the study of Torah as part of lifelong Jewish learning, *talmud Torah*;
- Pursuing social action and working for social justice, *tikkun olam*;
- Nurturing children, youth, and families through formal and informal education,
- Engaging in respectful dialogue about Israel as part of our commitment to the people, land and State of Israel, *Am Yisrael* and *Eretz Yisrael*

Proposed Tagline: Honoring Tradition, Celebrating Diversity, Building a Jewish Future

## Vision Statement -- Congregation Beth El in 2020<sup>11</sup>

In the year 2020, Congregation Beth El will be known as a vibrant, financially secure home built upon a unique collaboration between clergy, staff and congregants who have created an engaged and caring community recognized for its spiritual, educational and leadership development programs and inspired by the innovative adaptation of social networking technology.

### TRANSFORMING OUR SYNAGOGUE: A PATH FOR IMPLEMENTING OUR MISSION AND REACHING OUR VISION

Extensive dialogue among members of the strategic planning committee and the contributions made by members in the town hall meetings have led to a new insight that permeates this entire plan; namely, we see a need to transform our current organizational culture in order to optimize our lay-professional partnership. To do so, we need to: 1) distinguish the domains of leadership, clearly delineating which partners lead and which partners assist in any endeavor (see examples below), 2) ensuring high-priority functions have assigned leaders and sufficient assistance, and 3) build the infrastructure and processes that allow clergy, staff, and volunteers to work together successfully. In essence, to make the most of our lay-professional partnerships, we need to foster and actively support a *culture of engagement* that includes the following ingredients:

- *engagement* – provide avenues that guide members in creating a sustainable and welcoming congregation
- *shared learning* – create opportunities for members and professional staff to learn from one another to gain the skills and knowledge critical to making meaningful contributions

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<sup>11</sup> *About our Vision Statement:* The process of generating a vision statement provided an opportunity to dream and ultimately begin to work toward realizing the dream. Our dream in the early 1990s was to envision our community in a new building designed to meet the changing needs of our membership. The Vision Statement also reflects many of the ideas from our 2006 survey of Beth El's membership.

- *communal observance* – build upon the spirit of diversity found in our community programs and re-examine our lay-professional partnership to find new ways to value religious observance
- *collaborative teamwork*—involve volunteers and staff in team-supported activities and in working with other communal organizations to jointly-sponsor events.
- *Infrastructure support* – invest in the tools and practices necessary to support the lay-professional partnership, including new communication systems and diverse forms of collaboration.

Our desired organizational culture includes the three domains of leadership shown below with examples of programs falling within each domain:

**1. Clergy-Driven/Staff & Volunteer-Assisted: *Religious Envisioning Overall Judaic Leadership illustrated by a few examples (not a complete list)***

- High Holy Day Observance
- Community-wide observances
- Holiday Observance
- Lead Shabbat Services
- B’nai Mitzvah Program

**2. Staff-Driven/Clergy & Volunteer Assisted: *Operations Management illustrated by a few examples (not a complete list)***

- Safety, Security
- Emergency Preparedness
- Annual Campaign
- Membership Renewal & Services
- Operations Management

**3. Volunteer-Driven/Staff & Clergy Assisted: *Fiduciary Responsibility & Community Building illustrated by a few examples (not a complete list)***

- Volunteer Induction/Recognition (B)
- Leadership Development (B)
- Capital Campaign (B)
- Fundraising & Development Events
- Recurring Annual programming

## IMPLEMENTING OUR STRATEGIES & ACTION STEPS

The five key strategies emerging from our mission and vision include recommendations and action steps covering the next five years (2011-2015) are described in the full Strategic Plan and are highlighted as follows:

Strategy #1: Expanding *membership retention and in-reach* to promote a welcoming community that supports outreach and membership growth

Key Recommendations:

- Double the size of the current Membership Committee led by the VP for Membership from 8 to 16
- Develop the goals and objectives for the first two years of the strategic plan that combine the current priorities of the Board's Membership Committee with the strategic planning priorities
- Design a new sub-committee structure that could include, for example:
  - i. In-reach sub-committee (neighborhood and parent groups to promote community building)
  - ii. Outreach sub-committee (new member focus, marketing, Ambassadors)
  - iii. Retention & Research sub-committee (exit interviews, planning next membership survey for 2011 (five years after last survey), building name-tag culture, design evaluation plan)

Strategy #2: Building *financial stability* by launching an integrated fundraising program, enhancing earned income in existing programs, and investing in developing new revenue streams

Key Recommendations:

- Under the leadership of the Board President Elect, current President, and Past President, implements a new Capital Campaign Committee charged with designing a plan to identify/select/deploy staff support.
- Under the leadership of the Board Treasurer, develop a Revenue Enhancement Committee to identify, research, select, and develop new revenue enhancement programs.

Strategy # 3: Strengthening our *volunteer-staff partnerships* by clarifying existing and creating new leadership roles and implementing supportive systems and procedures to facilitate collaboration. This reflects our desire to utilize volunteer-staff partnership as the primary mode of operating, versus solely staff-led or solely volunteer run models.

Key Recommendations:

- Involve Senior Staff, Clergy and Executive Committee and Board in identifying workload implications related to implementing the Strategic Plan
- Create and recruit a director for Volunteer Coordination and have that person design the volunteer coordination function and chair a volunteer management committee.
- Clarify expectation for all volunteer roles and specify the role the staff and clergy will play.
- Develop goals and objectives for designing and implementing a volunteer management system and a staff support system for use by the Board and the Program Council.
- Develop processes and an IT strategy to support volunteer engagement.
- Create committee chair job descriptions, committee charters, and recruitment and orientation procedures/protocols for program committees

Strategy #4: Improving *communications* within our community and with the East Bay Jewish community through the effective use of technology

Key Recommendations:

- Under the leadership of the Executive Director and Board Secretary, a new Communications Committee needs to be developed by drawing upon the talents of the 40+ members of the congregation with expertise in advertising, marketing, media, graphics, editing, writing, and online web design.
- Develop a series of sub-committees to address such critical communications areas as:
  - i. Website updating
  - ii. Constructing/implementing a membership database
  - iii. Construction/implementing a volunteer database
  - iv. Construction/implementing a clergy communications system
  - v. Redesign/implement the Builder and improve the E-Update

Strategy #5: Enhancing our *investment in programs* for children, youth and adults based on member interests and expertise.

Key Recommendations:

- Develop an operating system to strengthen the Program Council that supports and optimizes opportunities for volunteer-staff partnership.
- Develop an annual integrated program planning process that brings the Senior Staff, Clergy, Board, and Program Council together to plan for each program year.
- Establish a series of ad hoc working committees to:
  - Review/select promising adult programs noted on URJ website and other sources, including developing congregational input on priority programs

- Review/select promising family/youth programs noted on URJ website and other sources
  - Develop volunteer-led interest groups related to the interests and/or occupational expertise of the membership (see Occupational Profile in strategic plan)
  - Develop a Program Evaluation system along with new database systems
- Develop plans for a Volunteer Leadership Development Program (including new chair orientation, leadership skill training, program coordination with other Jewish organizations, etc) based on a review of URJ resources.

### **Implementation Oversight**

The Board of Directors will assume the responsibility for providing oversight and review of implementation of the strategic plan. This will include appointing volunteers to work with senior staff and clergy to establish annual priorities, monitor development of annual action plans that support the strategy, and make adjustments as conditions affecting our community change. Thus the strategic plan is a living document to guide action and will only succeed if the Board provides the leadership required to implement it.

## Appendix B:

### Strategy # 1: Membership

It became increasingly clear throughout the strategic planning process that we all need to acquire a better understanding of the diversity of our membership in order to engage in more effective community building. In essence, if we knew more about each other, we could find new ways to connect with each other. These connections contribute to the vibrancy of our community that can: 1) help to increase ownership, 2) attract others to join the congregation, and 3) help retain current members.

Based on our survey of the membership in 2006 as part of our search for a new rabbi, we learned a great deal about the diversity of our membership representing the 40% that responded. Here are some highlights of the findings as the respondents were:

- Predominantly female (62%)
- Middle-aged (40-64)
- Highly educated (73% with graduate degrees)
- Raised Jewishly (83%)
- Married or living with a partner (82%) and with children (61%)
- Middle to upper income and politically liberal to moderate
- Beth El members for 6 or more years (60%)
- Part of inter-faith and/or inter-racial families (11%)
- Members of gay/lesbian families (8%)

A more recent review of the membership database indicates that there is considerable occupational diversity as noted below:

Lawyers and judges – 66

Teachers and educators – 62

Managers (program, middle & senior) -- 52

Psychologists and therapists – 51

Professors – 40

Health care professionals – 38

Physicians – 36

Retirees -- 35

Writers, journalists, editors, publishers – 33

Marketing, advertising, graphic design, media – 28

Management consultants – 27

Scientists – 26

Researchers and analysts – 24

Architects, designers, surveyors, inspectors – 24

Computer programmers, software engineers, webdesign, animation, database – 20

Homemakers – 21

Artists (dancers, musicians, actors) – 17

Real estate brokers – 16

Social workers – 16

Engineers – 14

Bankers, mortgage & investment brokers – 13

Environmental consultants, city & transportation planning – 10

Students --10

Accountants – 8

Nonprofit management and fundraising -- 7

Librarians and archivists – 7

Contractors (plumbing, electrical, general) – 8

Secretary & administrative assistants – 6

Photographers – 3

Optometrists – 2

Rabbis – 2

Gardeners – 2

Locksmith, Event planner, Labor organizer, Police officer, Telecommunications specialist, Film editor, Auctioneer, Producer, Concert Promoter, Firefighter, Wine judge -- 1

While this occupational profile provides an excellent membership profile of the employment characteristics, it does not provide us with a similar array of interests (e.g. foodies, fiction lovers, hobbyists, etc.). Pursuing such information could greatly enhance the planning process for future adult education programs.

When asked about the ten most important elements of our members' Jewish identity, the following emerged:

- Leading a moral and ethical life
- Making the world a better place
- Giving one's child a Jewish education
- Strong sense of belonging to a Jewish people
- Strengthening the Jewish identity of children
- Never forgetting the Holocaust
- Being proud to be a Jew
- Attending High Holiday Services
- Supporting Jewish education
- Having a clear sense of what being a Jew means to me
- Education oneself about Judaism

When it comes to participation in Beth El programs, 50% or more reported that they participate in childrens' programs (KeeTov, Family Shabbat, and Religious School). In addition, 50% or more participate in adult education programs (classes, social action projects) and a solid core of members participate in Torah Study. Respondents also reported being attracted to the diversity of the Beth El membership along with a desire for more opportunities to connect with others in the context of a welcoming environment. The hopes and dreams of the respondents included the prospect of Beth El becoming a community hub in the form of a more vibrant and spiritual community as well as a leader in social justice and outreach. Their aspirations for Beth El included:

- a destination, second to home and office (as opposed to a 'drive-through' congregation)
- a thriving, active, participatory, and bustling community/congregation
- a desire for a greater sense of connection with each other (older & younger, newer & older)
- a spiritual connection
- engaging Shabbat services

- more adult education activities (including for seniors) and post-B'nai mitzvah programs
- increased member involvement
- increased outreach to the Berkeley community and other Jewish groups locally/nationally
- a desire to do more social action work

This rich array of membership data suggests that the congregation would benefit from a similar survey every five years to stay in touch with changing perceptions of the membership as well as account for the views of newer members.

Based on these findings, the Membership Committee concluded that there were three major initiatives needed in relationship to in-reach, outreach, and retention.

*Inreach* (focusing on the first three years of membership)

- families aging out of pre-school
- families aging out of religious school
- B'nai Mitzvah parents
- Café environment for parents bringing children meet and connect while children are in school
- Connecting new members with long-time members (welcoming)
- Identifying manageable and attractive volunteer experiences for new members related to their expertise and/or interests
- Develop an exit interview system to learn from new members who choose not to renew as part of an in-reach program evaluation mechanism to insure that resources are targeted to high-impact activities

*Outreach* (recruiting new members)

- Strengthen website and membership packets
- Developing strategies to reach out to young families in the community (e.g. Solano Stroll, nursery schools and child care centers, JCC programs, Berkeley Parent's Network, play groups)
- Beth El events (viewing Purim carnival as new member recruitment opportunity along with other activities throughout the year)
- Working with current members to invite friends, neighbors, etc.(like a Face Book invite)
- Outreach to older prospects through existing programs (Torah Study & Chai Group)
- Making extensive use of URJ membership recruitment materials and promising practices.

*Retention* (contacting dissatisfied members to identify new ways of connecting)

- Identifying the location in the membership lifecycle where continuing membership may be a risk (pre-school, religious school, high school, college, empty nesting, retirement, etc.)

- Geomapping neighborhood affinity groups to help shrink the psychological size of the congregation and support more group activity (Chavurot, group attendance at services, social action projects, etc.)
- Developing database strategies to target sub-groups by neighborhood, occupation, family structure, etc. along with the potential of expanding Beth El website for social networking, streaming sermons or Torah study discussions missed, etc.

## Appendix C:

### Strategy #2: Building financial stability

#### Introduction

Congregation Beth El has faced significant financial challenges since setting out to build the facility at 1301 Oxford Street. Beth El met the initial challenge of building by launching a lay-led capital campaign that raised \$4.2 million dollars from the 500-household congregation, a sum that exceeded professional fundraiser's projections of fundraising potential by a factor of 2. Beth El also sold its old building for \$3 million. The Congregation expected to combine these funds with a mortgage of \$3 million to finance the new 31,000 sq ft building. However, the multi-year delay in construction, coupled with an unprecedented increase in cost of building materials to increase the ultimate cost of the building almost two-fold. The final cost was closer to \$18 million rather than \$10 million.

The Congregation borrowed money to meet the gap between funds available from the successful capital campaign and the sale of the Vine Street property and the cost of the building. Thus, when Congregation Beth El moved into the facility at 1301 Oxford Street in 2005, it carried a debt burden of nearly \$10 million on average annual revenue of \$2.7 million, with no endowment. Loans came from three sources: approximately 26% in congregant direct or secured loans, and 74% from City National Bank (CNB). In June 2010, the Congregation's total indebtedness was \$9.8 million, \$7.2 million from CNB and \$2.5 million from congregant sources (See Appendix for Financial Summary).

Congregation Beth El is, without question, "house poor." While annual revenue from operations slightly exceeds operating expenses, generating a modest operating surplus, the mortgage payment consumes that operating surplus and, in recent years has produced a deficit. The new facility also required a significant increase in on-going and long-term maintenance costs. There are no financial reserves for covering the cost of basic long-term building maintenance and upkeep. This financial reality has been the focus of staff, clergy and lay leadership since 2003.

In 2008, the Congregation anticipated that it would be unable to continue to make mortgage payments and approached CNB in November of 2008 to restructure the terms of the loan. The Congregation withheld payments during negotiations and the loan went into default in March of 2009. After about 11 months of negotiations, led by a team of congregants, the loan was successfully renegotiated, cutting monthly mortgage payments from \$55K to \$25K while agreeing to a schedule of eight annual lump sum payments to decrease the principal balance on the loan. The first such payment, \$250,000, must be made in March of 2012.

The debt burden means that Congregation Beth El must raise a minimum of \$450K each year, over and above annual dues to meet its financial obligations. It must raise an additional \$2.6 million over the next 9 years to meet the obligation to pay down principal.

The debt burden is and has been the central focus of the congregation for the past five years. It has dominated the attention of clergy, staff, and lay leadership even as they faced unprecedented staff turnover and the need to build on the promise of new clergy in a facility full of potential to attract and retain members. Our essential challenge today is to formulate and implement a financial strategy that not only addresses this pressing debt burden, but also builds a sustainable revenue model that allows us to realize our vision for our community.

A three-part approach is needed:

- Maximizing revenue from existing sources
- Implementing well developed fundraising program, including a capital campaign and planned giving
- Launching new revenue generating efforts that are consistent with our community's strengths and values.

### **Maximizing Revenue from Existing Sources**

Congregation Beth El has two primary types of income, earned and contributed. For FY 2010-2011, earned income is budgeted to account for 59% of total revenue and contributed income, including dues, for 41%<sup>12</sup>. Our biggest income producing sources are Camp Kee Tov, Annual Dues, Nursery School, and member contributions, in that order. To secure our financial future, the Congregation must maximize income from all sources.

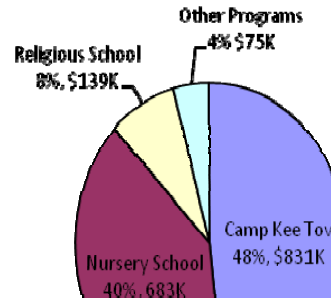
### **Earned Income**

Earned income is generated through formal programs such as Camp Kee Tov and other activities like facility usage fees for member events, and gift shop sales. (See Figure 1.)

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<sup>12</sup> Percentages are taken from the Congregation Beth El Budget for Fiscal Year 2010-2011, June 2010.

**Figure 1: Congregation Beth El Earned Income**



Note: Based on 2010-2011 Budget, June 2010. Based on total *earned* income of \$1.7 million

*Program Income*

Income from our core programs accounts for the lion's share of earned income. The Executive Director and Board Finance Committee have recently reviewed program revenue from Nursery School, Religious School, and Camp Kee Tov. They examined expenses, fees, and the size and impact of member fee discounts on total program revenue. In some cases, member discounts resulted in significant reduction of revenue to the Congregation. Thus member discounts were adjusted for both Nursery School and Kee Tov fees.

The Executive Director anticipates that an additional \$175K can be realized from Camp Kee Tov (\$110K), Religious School (\$20K), and Nursery School (\$45K) by the end of FY 12-13, in comparison with fiscal year 2009-2010 results.

The primary mechanism is enrollment growth for both Camp Kee Tov and Religious School, and the targets noted below have been set. Camp Enrollment is target at 760 for the summer of 2010 with a projected gain of 50 for 2011. The goal is to bring Camp Kee Tov enrollment to at 840 campers for the summer of 2012, and to reach capacity of 900 campers by summer 2013 (Fiscal Year 2013-2014). CKT enrollment is limited primarily by the number of buses and traffic at CBE.

More effective financial management of these core programs can also reduce expenses or maintain overall expenses steady while enrollment and revenues increase.

*Table 1: Potential Increases in Earned Income (in comparison to FY 2009-10)*

	Camp Kee Tov Increased Enrollment/Revenue	Religious School (Kadim & Chug Mishpacha) Increased Enrollment/ Revenue	Nursery School
2010-2011 Budget	--40 campers \$35,000	#\$No growth	\$15,000
2011-2012	40 campers \$35,000	#\$20 students \$10,000	\$15,000
2012-2013	40 campers \$40,000	20 students \$10,000	\$15,000
Total	120 campers \$110,000	40 students \$20,000	\$45,000

Beth El Nursery School operates under different constraints. Licensing currently limits enrollment to 64 FTE children. It is currently enrolled to full capacity. To expand the nursery school program Congregation Beth El at a minimum would have to build new toileting facilities and make other building modifications. The projected \$45,000 revenue increase for Nursery School will result from controlling expenses (primarily staff payroll and benefits) reduction in member discounts over a 3 year period, and increased enrollment in summer and after school daycare programs. It is important to note, however, that Congregation Beth El could invest in expanding the Nursery School in the existing facility and seeking licensing to operate at a higher enrollment.

### **Recommendations for Maximizing Program Revenue**

Enrollment increases in either Camp Kee Tov or Religious School will only occur as a result of careful and visionary management, innovative programming, and a thoughtful marketing effort.

- **Formulate and implement an effective marketing effort for Camp Kee Tov that leverages new media and targets parents and their older kids.** Camp Kee Tov draws enrollment from within and outside of the Beth El community. There have been waiting lists for Camp Kee Tov in Beth El's recent history and marketing efforts were fairly nominal. However, there is significant competition in the field, particularly for older children, and Beth El has only recently updated and diversified its programming to try to attract older children. More aggressive marketing that leverages social media and conveys the experience of being at Kee Tov to both potential campers and their parents is needed.
- **Assess barriers to and drivers of enrollment in Religious School, and develop a market strategy based on in-reach to Beth El families that seeks to engage youth and grow enrollment.** Jewish day schools, independent bar/bat mitzvahs, and extra curricular activities compete for the time of elementary and middle school aged kids and their families. Formal religious education must adapt to compete successfully. Work has already begun to understand the needs of Beth El families, to create an array of informal programs and enhance formal education. A clear strategy with tangible milestones needs to be implemented that is supported with effective marketing to eligible families.

*Other Earned Income* The Finance Committee and Executive Director should examine the feasibility of increasing revenues from other sources within the constraints of using existing staff and infrastructure.

Other income would include revenue from rental fees, catering, gift shop sales, and events such as lecture for which fees are charged and constitutes just 3% of total revenues and 4% of earned income.

Options:

Bar Mitzvah Event Rental - Identify the percentage of b'nai mitzvah families that holds evening events for which the Congregation charges rental fees with an eye toward increasing revenue by increasing the number of families who use the space. There is significant competition for event rental. Understanding what the competition offers in amenities and services is critical to increasing revenue from this source. Year 1: market Beth El's facilities effectively to b'nai mitzvah families and initiate analysis of the spaces b'nai mitzvah families who don't use Beth El are using and find out why. Year 2: formulate a rental plan that positions Beth El advantageously, including an appropriate staffing model. Year 3: work the plan.

Congregant Events – Examine the possibility of increasing revenue from leasing space to members for congregant events. The same work that helps increase appeal to b'nai mitzvah families will support this recommendation. A careful analysis of Beth El's

database, with an eye to major milestones (big birthdays, graduations, anniversaries, retirement) may reveal a target market within our congregation.

**Expand number of events held at Beth El (e.g. Federation Annual Meeting) and create and market an institutional membership that allows other organizations to hold their events at Beth El (e.g., private school fundraisers).** Year 1: Set goals for expanding events held at Congregation Beth El by sister organizations and proactively contact them. Year 2: assess feasibility of and competitive rates/benefits of institutional memberships.

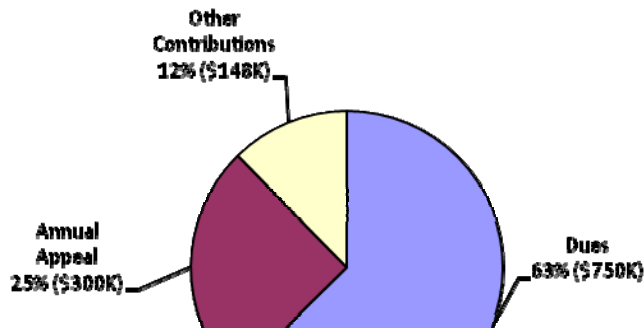
Ticket/Adult Class Revenue – Revenue from tickets and fees for programs open to the public was about \$YY in FY 2010. This revenue source may, indeed be increased based on program strategy (See page Y.)

Gift Shop – In FY 2010, the Gift Shop contributed \$11,500 to the general fund. Gift shop merchandise is sold to congregants who come into the lobby during business hours and during the annual Chanukah Bazaar. Congregants or relatives who may be coming for bar/bat mitzvah celebrations who do not come to Beth El during business hours or who do not attend the bazaar have no way to shop at Beth El. Yet, the merchandise is of a quality to appeal to many inside and outside our congregation.

### **Contributed Income**

In FY 2010-2011, 41% of Congregation Beth El's total revenue is budgeted to be contributed by congregants. Dues or "annual tzedakah" make up 63% of all contributions. The annual appeal is budgeted to contribute 25%, and other fundraising, including Super Dues and the Gala, account for an additional 12%. Thus Beth El's annual budget relies upon raising \$450K in donations from congregants, over and above annual dues. Beginning in 2011-2012, the congregation will need to generate an additional sum, totaling \$2.6 million, to meet obligations to pay down principal. So, for example, in 2012, without inflation or increases in operating expenses, the congregation must raise \$450K+\$250K principal payment to service its debt and run programs at their 2010 staffing levels. In 2013, the total number increases from \$700K to \$875K.

Figure 2: Contributed Income



Note: Based on 2010-2011 Budget, June 2010. Based on total contributions of income of \$1.2 million

Clearly, to consistently generate this kind of contributed income, the Congregation needs a comprehensive fund raising strategy and the infrastructure to implement it. A critical part of that strategy must be a capital campaign and a steering committee has been formed to launch it. Other essential components are: a planned giving program, coordinated events fundraising, and an annual campaign. None of these can be successfully implemented with out strong lay leadership and dedicated staff support as well as adequate IT systems.

In addition, Beth El experiences a dramatic “dues gap,” annual dues covering only 47% of the cost of a member.

	Per member family	Gap
Average dues paid	\$1600	
Annual dues request	\$2650	\$1050
Operating cost per member family	\$3420	\$1820

## Recommendations for Maximizing Contributed Income:

- **Increase dues revenue through better communication** regarding the congregations overall finances and the day to day cost of doing business vs. average cost per member. Our goal should be to realize an increase of \$150 in the average dues payment, which, at 500 families, would provide an additional \$75,000 in operating funds. Better follow up on the membership renewal process and the building of relationships between clergy, staff, and members on multiple levels will help.
- **Consider alternative dues structures to maximize revenue.** Our current dues structure provides one tier of payment regardless of family size. In addition, families who participate in programs have a variety of incentives to join or not to join the synagogue. Having several intentional tiers of dues payments (rather than each member choosing its own virtual tier), which would correspond to the member's or member family's life stage, could create more predictable revenue and provide opportunities for maximizing revenue from certain subgroups of members.
- **Build the systems and processes to support a professional fundraising operation.** This includes administrative support, fundraising database, well trained and engaged lay leadership. Year 1: dedicate appropriate administrative resources to support fundraising, including database management, acknowledgement, information sharing, scheduling meetings, etc. This is an immediate need. Year 2: create materials for members that articulate the opportunities for giving, and ensure every member and every new member gets them.
- **Launch a capital campaign in 2010 with a goal of completing silent phase by June 2011.** Steering committee has convened and will produce overall strategy, recruit leaders, and launch campaign. In parallel, launch the Planned Giving Campaign.
- **Analyze and optimize fundraising** events, including the Gala, Livod Hatsibur, Purim Baskets, etc. Be clear about whether they are primarily fundraising events or primarily community-building events. Then assess their effectiveness and set goals.
- **Organize and market naming/recognition opportunities.** Opportunities to by buying bricks, yahrzeit plaques, chairs, or naming parts of our facility should be common knowledge among members and staff. It should be easy to make such a contribution and clear whom to contact. Year 1: structure a team of volunteers and staff to create a plan to increase contributions; Year 2: work the plan.

## Maximizing Revenue from New Sources

It is essential to increase contributed income, and to increase income from existing sources. Meeting fundraising goals will ensure that Congregation Beth El breaks even at its current level

of membership and staffing. It ensures that we can pay our mortgage. Increasing income from operations will help us to cover inflation at existing staffing levels. These things alone will not generate the resources necessary to invest in our community over and above our current level of operations. Specifically it will not allow us to fill deficits in staffing such as a full time program director or facilities manager. It will allow us to maintain the status quo over the next ten years.

New sources of income are needed to advance the mission of Congregation Beth El, ensure all who would participate may, and secure our future. The overall goal should be to generate build a portfolio of sustainable revenue generating programs that contribute to our community resources. Opportunities should: be consistent with our mission and values, be sustainable over time, and generate at least \$25,000/year once brought to scale. The overall goal should be to contribute a minimum of \$100,000/year beginning in 2015.

*Recommendations for New Sources of Income:*

We recommend that the Congregation explore the income generating potential of opportunities that build on Congregation Beth El's strengths to establish long-term income streams that can be used to invest in our community.

Congregation has significant strength and underutilized assets:

- Our building and grounds – For most of the hours of the day, the majority of our building is empty and our grounds are unused.
- Our early childhood program – Beth El Nursery School has been helping families rear young children for over 40 years.
- Our People – Our 2006 member survey reveal that our congregation is replete with highly educated professionals. A 2009 analysis of professions found that our members possess a wide range of expertise. Our members, clergy, and staff have knowledge and skills as well as connections to share.

The Strategic Planning Committee identified these opportunities to explore:

- Making our facility available for professional conferences and meetings.
- Making our kitchen available for professional catering/food preparation.
- Leveraging our grounds as an outdoor classroom.
- Leveraging our grounds as a revenue generating garden (food and/or plants). Garden project will not generate significant revenue – it will be part of leveraging our grounds as outdoor classroom.
- Expanding Nursery School to include 1-2 year-olds. (For example: child care for this age group ranges from \$1700-\$1500/month for full time care.)
- Sponsoring educational seminars.

It will take lay leadership to assess the income generating potential of these ideas. Based on our strengths we recommend the following priorities.

#### Year 1: 2011-2012

1. Establish a task force on early childcare to assess market, earnings potential, licensing requirements, facility investments, and occupancy permit requirements for expanding to the 1-2 year old age group. Report to Board by March 2011.
2. Establish a taskforce to investigate market potential for conference/meeting space and devise a service delivery plan that would successfully deliver the appropriate level of service while yielding optimal revenue for Beth El. Launch by Fall 2011.
3. Kitchen plan – Determine feasibility and regulatory requirements of leasing our kitchen as a catering preparation kitchen or cooking school. Evaluate strengths and weaknesses of our facility and potential for revenue generation. (Imagine: Co—sponsored Jewish cooking classes with Lehrhaus.)
4. Educational Seminars – Identify income potential from both rental fees and ticket sales. Identify potential partners and evaluate relationship with Lehrhaus Judaica. Make a recommendation to Program Council prior to presentation to Board. Come to Board in February 2011.

#### Year 2: 2012-2013

Actions for year 2 and beyond depend on whether the opportunities pan out. In general, year 2 would be the first year of implementation on projects for which there was a compelling business case and action plan.

1. Assess potential for a Jewish Garden – Such a garden may be an outdoor classroom, community garden, organic food garden and/or nursery that generates revenue by selling educational services or crops, and serves as a refuge for all who would use it. Determine revenue and community benefit potential for garden for the congregation, the neighborhood, Jewish community, and East Bay Community. [Q3 2011]
2. If potential for a Jewish garden exists that is consistent with our mission, convene congregant led-task force to create action plan for review by Program Council and develop budget for presentation to Board. Note: depending on strategy, this is a project that could cost very little to begin. If implementation is to occur in 2012-2013, plan must be approved by PC and then Board by January of 2012.

## Appendix D:

### Strategy #3: Volunteer/Staff Partnership

#### Identifying the Issues

As with most relationships, it is essential to capture the perceptions of both sides. This report includes three sections: 1) the perceptions of staff (as reported by the Rabbi and ED) and volunteers (as reported by the Volunteer Committee Chair and other Committee Chairs), 2) a brief analysis of these shared and conflicting perceptions, and 3) preliminary recommendations for addressing the issues. The focus of this report is the identification of challenges and opportunities to create a “culture of ownership” on the part of all parties involved.

#### *Staff Perceptions*

- Given the limited amount of staff and the current financial constraints, there needs to be increased attention to finding the balance in lay-professional relations in order to avoid staff and volunteer burnout, misunderstandings leading to the generation of more communication problems, and missed opportunities to collaborate.
- Given the extensive amount of change and staff turnover over the past 5 years, there is an urgent need to understand the needs of the organization as it completes its 65<sup>th</sup> year and realign the expectations of long-time members and introduce new expectations for all members so that the staff-volunteer relationship reflects better balance for the intermediate size of the congregation at 500 members (not small as in 200 and not large as in 1000).
- In order to creating the “best place” to work for both staff and volunteers, there is a need for an organization chart that links staff with key lay leaders, along with a set of responsibility profiles that put in writing the respective expectations associated with each position in order to improve understanding and find better ways to collaborate.
- There is a long-standing need for a volunteer leadership program for all those chairing committees, serving on the board, and those engaged in identifying new leadership in order to improve the overall effectiveness of the organization and facilitate the recurring and customary leadership transitions.
- Given the need to maximize limited volunteer and staff resources in the area of education, the restructuring of the education committees should be considered so that youth and adult education receives focused attention and early childhood education receives more focused attention.

- Given the innovation of a Program Council two years ago to foster greater understanding and collaboration, a review of the experience is needed in order to identify lessons learned.
- While resources will continue to be constrained in the years ahead, it is essential that attention be given to designing a position (possibly under contract) for a new Development/Marketing person to assist lay leadership and senior staff with a capital campaign to retire the current mortgage.
- Given the shortage of staff, the Rabbi has assumed many more administrative duties than is feasible to operate as the spiritual/educational leader of the congregation and therefore new strategies need to be developed to free him up to do the job he was hired to do.

### *Volunteer Perceptions*

- Given the increased need for collaboration and support, more attention needs to be given to defining the roles of staff and volunteers in order to address the blurring of roles and the problems with communications.
- One of the biggest challenges emerges in the area of food service where policies and procedures for both staff and volunteers are needed in relationship to sanitation, equipment control, food storage and presentation, and security. For example, issues that should be handled by staff are deferred to volunteers on an ad hoc basis, in part, because they are low priority given all the other staff demands and, in part, because knowledge may reside more with congregants than staff as a result of recent staff turnover.
- Given the limited availability of staff support that can inhibit (and burnout) volunteers and negatively impact program effectiveness and efficiency, there is a substantial need for manuals in such areas as: food service, b'nai mitzvah event planning, Shabbat event planning, facilities management, mitzvah corp facilitation, new member welcome and orientation, and other major programs relying on volunteer leadership.
- Given the centrality of volunteerism in the life of the congregation and economics of the organization (time=money) as well as an easily accessible volunteer database, increased attention is needed to promote Board and Program Council visibility for the volunteer coordination function, including the prospect of a new Vice President of Volunteering (of equal stature as the Treasurer who oversees finance). For example, there are many potential new member volunteers but no clear way to harness their energy when names are not passed along to the volunteer committee and/or staff do not or cannot reach out and make the connection.
- The lack of leadership training for committee chairs and program-related training for volunteers inhibits effective use of volunteers and the grooming of new leaders.

- Volunteers end up taking on bigger jobs than anticipated and burn out and we also tap the same people again and again, especially when staff members (other than janitors) are not available over Shabbat.

## II. Analysis of Shared and Conflicting Perceptions

It seems clear from the shared and conflicting perceptions that much is needed to strengthen the lay-professional partnerships. While small congregations tend to be “lay led and staff assisted”, large congregations tend to be “staff led and lay assisted”. Congregation Beth El operates somewhere in between these two types of organizations. It is both staff and lay led (Board) as well as both staff and lay managed. The key is identifying and defining the balance as it relates to program and administrative support. This process may lead to redefining both staff and volunteer roles in the future in order to promote better staff-staff coordination as well as volunteer-staff and volunteer-volunteer coordination.

## III. Preliminary Recommendations

- Design organization chart that includes all staff and key lay leaders as well as the responsibility profiles for each.
- Develop a series of program implementation manuals to facilitate volunteer-staff communications (e.g. how to use building; how to do food service; how to do an event) .
- Use evaluation of the Program Council to address continuing coordination and volunteer management issues, especially the redesign of the education committees
- Identify a new board position/officer for Volunteer Coordination all with a large committee of volunteers.
- Identify new staff positions in the area of early childhood education and development/marketing
- Acknowledge the value of volunteer time and integrate it into the business plan
- Develop IT tools/manuals similar to those used for homeless meal to support volunteers
- Consult with the Volunteer Bureau to see how we might facilitate our on volunteer coordination by recruiting a volunteer house manager who is on hand for all events.
- Develop an online volunteer management system to facilitate recruitment, retention, recognition, and training.
- Expand annual recognition event to include other ways of thanking volunteers, publicly and privately
- Develop a system for managing food services, including an regularly evaluated roster of preferred caterers
- Design a volunteer leadership program that addresses many of the issues noted above

## Appendix E:

### Strategy #4: Communications

What are the most effective means of enhancing communication at Beth El? This is the central charge of the Strategic Planning Subcommittee on Communications. We are a medium-size congregation of 500 families – small enough for meaningful, personal involvement, yet large enough to count on the active involvement of our members and devoted lay leaders. How well are we letting our congregants know our needs, or even asking for help? How well are we giving them opportunities to volunteer and step up, to learn what is going on here, or engage with other members? Are we effectively using existing communication vehicles to build community? Should we revise our current communication strategies and introduce new ones?

The issues discussed are believed to interfere with or impede our goal of achieving the establishment of a community in which members feel connected, engaged and committed. The strategies proposed address these issues. Both the issues and strategies were generated from the following sources: interviews (Rabbi Kahn, Norm Frankel, Lisa Cain), the 2006 Membership Survey, a survey of best practices from URJ's website and the Communication Committee's survey of numerous reform synagogue websites.

#### *Major Communication Issues and Strategies*

Below, two types of issues and corresponding strategies are identified. We call these "Technology Issues and Strategies" and "People Issues and Strategies" which refers to synagogue communications that do not necessarily rely on technology.

#### *Technology Issues and Strategies*

In general, our review of Beth El's use of electronic communication has raised the following key questions: Are we overly reliant on electronic communications? Do we make the most effective use of these tools? Over the last few years we have greatly reduced our use of snail mail, primarily because of expense (money and time). In moving to a heavier reliance on electronic media, have we unintentionally sacrificed our ability to communicate with members? The following information needs to be considered in our assessment of electronic communications:

1. One estimate is that 50 to 100 of our members are not online (or almost 20% of the congregation) and yet we have significantly reduced our use of snail mail.
2. There is also a significant population of members (non-age specific) who are online but would prefer receiving snail mail more frequently.

3. Parents of children in the religious school receive internet communications from both the synagogue and the religious school. What are the possibilities for streamlining these communications?

Our primary technology-based communication vehicles with congregants are our website, *The Builder* and the Weekly E-Update.

**Website:** Our website is in significant need of redesign. In fact, as this report is being produced, efforts are currently underway to address this issue. We hope that the ideas discussed here will be helpful to that ongoing work. Our increasing dependence on this communication vehicle necessitates a thorough reassessment and modification. For example, currently there are links to non-existent programs (e.g., Women of Beth El, Rosh Chodesh Group) and the calendar is incomplete (e.g., as of June 1 the calendar does not include the special Shabbat service honoring our Rabbis, Friday night Shabbat service times, or adult programming). In addition, a redesign of the website could take advantage of online potential for community-building.

1. What is interfering with our ability to keep our website current, and what processes need to be put in place to make this possible? What costs are involved, both financial and with respect to staff and lay leader time and energy, with redesigning our website?
2. It is unclear as to whether our web page in its current form is helping us achieve our goal of increasing member participation and involvement in the synagogue. Is it easily accessible? Is it engaging? Does it contribute towards increased communication between members? Does it contribute towards increased two-way communication between members, clergy, and staff?

**Website Strategies:** A primary strategy concerns the maintenance and supervision of the website. The success of the website depends upon identifying a skilled staff person as Webmaster who is given sufficient time and resources necessary to do the job. The content and interface of the website requires redesign around the following suggested goals. The website should:

1. Be visually dynamic, interesting – photographs (new ones incorporated regularly) should be in evidence throughout the website beginning with the home page that could feature an informal photo of Rabbi Kahn with congregants. There could be slide shows, a visual tour of the building, photo galleries including historical photographs, board members, staff and teaching staff, and photos of our multigenerational and diverse congregation.
2. Clearly communicate who we are (e.g., it should feature our tag line and mission statement, profiles/photos of staff, board members, program chairs, highlight what value through our new covenant (in progress)).
3. Promotes communication:

- a. Between members with a members-only online directory (photos included), members-only social media network, a weekly (or monthly) single-question poll on the home page (e.g., “Which are your preferred ways of learning about events at Beth El?: *The Builder* , our website, letter/postcard, phone call, an announcement during services?”)
  - b. Between members by keeping them informed of opportunities and activities of our *Havurot* and the newly emerging neighborhood groups (currently being initiated by Ruth Ehrenkrantz)
  - c. Between staff and members with online feedback forms (e.g., program interests, suggestions for speakers or classes, and the like)
  - d. Between clergy and members (e.g. a Rabbi’s corner where Rabbi Kahn can develop short, ongoing messages to the congregation)
4. Provides innovative as well as practical opportunities to increase member participation in all aspects of synagogue life (e.g., online signups for programs and events, frequent opportunities to volunteer, and opportunities to learn (e.g., online audios of the blessings and ritual music), a calendar with a “print friendly” option that includes not only all programming and events, but also organizational information such as board meetings, committee meetings, etc.) See Sacramento B’nai Israel example: <http://www.bnais.com/>
  5. Provides an incentive and opportunity to make donations online (a mix of giving opportunities including the Capital Campaign, more complete instructions about eScrip, etc.)

***The Builder***: In its current form *The Builder* is approximately a 20 page PDF file. To locate the publication on the Beth El website requires opening up a link that says News Archives. It is a bi-monthly publication. About 100 printed copies of *The Builder* are produced on the Beth El printer. Of these 100, about 30 are mailed at a cost of \$2 to \$3 dollars each (depending on the size of the publication). The other 70 are used for marketing purposes.

1. The production of *The Builder* is currently staff-produced and requires significant time and effort (deciding on content, writing, and editing). Should congregants play a more active role in this work? Should the objective of *The Builder* as well as its content/format be reviewed?
2. Should *The Builder* be issued more than bi-monthly, especially if this is the primary way some congregants learn about synagogue events/opportunities? A bi-monthly schedule also becomes problematic because it is not always possible to include last minute events within this time frame.

3. Advertising revenues from *The Builder* average \$2500 per year. Because we include advertising we are not permitted to use bulk mail postage rates. How vital is this income? Can this income be redirected to another vehicle or somehow retained for this publication? Are there alternative ways to incorporate advertising on our website? Is this advisable?
4. The current online format is a PDF file that is static and means that when viewed on line there is no way to link to events, other information, or other parts of the website. It can be downloaded, printed and read, but at 20 pages long, this would be a formidable barrier to doing so.
5. Could there be alternative ways to achieve the goals of *The Builder* and at the same time recognize the needs of members who are not on line or who prefer to be updated about synagogue events via snail mail?

***The Builder Strategies:*** The strategic planning process provides an ideal opportunity to revisit the purpose, content and distribution of *The Builder*. We would like to suggest two different strategies for thinking about this publication. The first is while keeping the bi-monthly schedule, to radically change its content –from an emphasis on staff (reports from the Rabbi, Executive Director, Religious School Director, etc) to one that focuses on members (e.g., themes, profiles about members, essays by members). In addition, the production process could include members (e.g., an editorial board that includes members as well as the Rabbi and Executive Director).

A second strategy would be to radically transform *The Builder* into a monthly calendar and announcement of events that would include the on-line capacity to register for events where appropriate. This publication would be limited to 5 pages. In addition, three or four times throughout the year the publication would include a special section that might be called *Acts of Loving Kindness* (for example) that would include information about donors and would list gifts made to the congregation. This publication would be included as a marketing tool in membership packets that could be located on a tastefully designed rack in the Gallery (thus eliminating the current table that holds announcements, membership materials, etc).

Finally, we would like to suggest that mailing of *The Builder* involve a nominal annual fee for congregants choosing to receive *The Builder* in the mail.

**Weekly E-update:** The E-Update is readable and engaging. Currently it arrives on Thursdays. In the interest of giving congregants an opportunity to take advantage of Shabbat activities, is it possible to schedule the E-update for Tuesdays? What are some cost-efficient strategies for sharing this electronic information with congregants who are not on-line?

### **People Issues and Strategies**

Here, two areas are discussed: In-reach Communications among synagogue members, clergy and staff and Outreach Communications in which the synagogue communicates with the larger community.

### **In-reach Communication:**

1. One critical issue is that of communications between staff and lay leaders, and volunteers – members are unclear about lines of communication to staff. (*See Staff/Volunteer Partnership at Congregation Beth El Report to Strategic Planning Committee*)
2. The 2006 membership survey indicates that congregants, while proud of Beth El's positive attributes, nonetheless believe that there are areas where the synagogue does not live up to their expectations for a sense of belonging – for *community*. Many expressed a desire for a greater sense of connection with each other.

**In-reach Strategies:** Strategies for improving our in-reach between members, clergy and staff include the following:

1. Name tags – explore the feasibility of developing a name-tag culture and system for production, storage and updating considerations.
2. Even though an online member directory with photographs is a technological concern, this committee strongly supports the establishment of such a program as a central way to increase member-to-member communication. Concurrently, a hardcopy of the directory should be made available to members not online.
3. Develop a system for keeping clergy fully informed regarding important events in members lives (e.g. telephone hotline to dedicated staff person)
4. Develop strategies for reaching out to our interfaith families, some of whom may find it difficult to fully participate in Beth El practices due to lack of knowledge, shyness, etc. (e.g., establish a policy that every Hebrew word used in our communications to congregants is italicized and followed by the English translation), such as the appearance of the word *Havurot* in this document. Perhaps an online glossary of terms could be added to the website.
5. Increase the numbers of personal telephone calls to members (rather than relying on email) to solicit assistance and share information. This may include developing phone trees when communicating with larger numbers of members.
6. Convene “meet and greet” times in congregants homes with the Rabbis and new members
7. Increase the use of event post-cards (3-4 times per year) to invite members to program opportunities. This would require developing an annual selection strategy.
8. Establish the tradition of a volunteer fair, where members can learn about and sign up for volunteer opportunities.

9. Support the newly designed neighborhood groups and use these groups as key communication vehicles for the synagogue. *Havurot* can be used in the same way.

**Outreach Communication:** Outreach

1. Prospective Members: While the Membership Committee of the Strategic Planning Process will most likely address the issue of outreach to prospective members, the communication committee has also addressed this topic. Communications with prospective members at Beth El is accomplished by three vehicles: our website, printed material and word-of mouth.
  - a. Website Communications: On-line communication with prospective members includes letters of welcome from our Rabbi, Executive Director and Membership Chair, as well as membership forms, dues information and capital campaign information. Is it possible that the information regarding dues as well as capital campaign contributions might have a reverse effect, scaring away prospective members who might believe they could never afford membership? If we strive to become a synagogue with a greater emphasis on personal connections, does the online process enhance or inhibit this goal?
  - b. Printed Material: Can we make our print material and on-line communications more effective, visually appealing, and user-friendly? Can we find more effective dissemination strategies for our packets that are currently available on a table in the Gallery? While we do offer online membership forms and welcome letters from the Rabbi, Executive Director and Membership Chair, are there other strategies we can incorporate into this option.
  - c. Word-of-Mouth: How can we help congregants become our best communication vehicle for articulating what Congregation Beth El is and does?
2. Outreach to Our Diverse Community: Beth El has the opportunity to develop an effective outreach program for a variety of target groups such as interfaith families, the GLBT community, single adults, college-age students, or empty nesters. What are our priorities, what is our message and how do we communicate this message?
3. Outreach to the Community-at-Large: How can we expand our reach to the wider community, improving our capacity to communicate Beth El events and opportunities to other Jews and to those interested in Judaism throughout the Berkeley/East Bay/Bay Area community?

**Outreach Strategies:** Strategies for improving communication with the general community include the following:

1. Establish a publicity team of members who are charged with keeping news of Beth El in *The J* and other Berkeley/East Bay news links
2. With respect to our diverse community, we need to begin by prioritizing the direction of our outreach. Our message and programmatic strategies will be determined by clarifying

the direction of our outreach efforts. Most importantly, we must involve members of the congregation who come from these demographics.

3. Outreach to interfaith families, as developed over more than 30 years by the URJ, focuses on the creation of an encouraging, welcoming atmosphere for interfaith families and Jews-by-Choice, by developing programming specifically designed to promote inclusiveness and gentle education for both the Jewish and non-Jewish partner. Such programming at Beth El should involve interfaith and Jews-by-Choice congregants. We support the use of the URJ resources and Karen Kushner's Project Welcome (which Beth El's Membership Committee is currently exploring). Further elaboration of resources can be found at: <http://urj.org/cong/outreach/interfaith/>

### **Recommendations**

Based on the discussion of the Communication Sub-Committee's Report to the Strategic Planning Committee, the identification of the following set of goals and priorities emerged.

#### Overarching Communication Goals:

- All communication strategies should work towards building community, engaging members in synagogue life, and increasing commitment
- Communications about program opportunities and about all members of the community should be timely and engaging
- The management of all aspects of communications should be systematic and comprehensive
- Technology, which is vital to supporting effective communications, should be supported by a state-of-the-art database as well as a highly engaging and effective website

#### Programmatic Priorities:

- Redesign the e-update to a shorter version that seamlessly leads the user back to the Beth El website for program details, registration information, news, etc.
- Develop a phone-tree "buddy" system of volunteers who assume the weekly responsibility of calling "off-line" senior members with the e-update news and details
- Redesign *The Builder* to be considerably shorter, emphasizing the calendar and events, acknowledgements of gifts, and has content about members written by members, and supported by an editorial committee composed of staff and members. In the interest of streamlining *The Builder*, the benefits of adding pages to the publication with advertising need to be weighed.

- Create a system that promotes hearing from the clergy on a regular basis (through weekly messages, podcasts, etc)
- Develop an online membership directory (with photos)
- Develop a “name-tag culture” in which all board members and program chairs wear permanent name tags at all public events, and in which it is expected that all gatherings provide a sufficient number of disposable name tags available for all participants
- Introduce a URJ model Caring Communities program that helps the congregation and clergy know about and acknowledge milestone and significant life events in members’ lives
- Establish a Communications Committee that is linked to the Membership Committee, and that addresses issues of marketing and branding (e.g., develops a membership brochure)
- Create an encouraging, welcoming atmosphere for interfaith families and Jews-by-Choice by developing programming specifically designed to promote inclusiveness and gentle education for both the Jewish and non-Jewish partner based on the URJ Project Welcome

Proposed Outline for Beth El’s Future Website (*new structure, titles and functions*)

1. Home Page –message of welcome from the Rabbi with photograph, photos of the congregants, Who are we: use our tag line here, and feature announcement of upcoming events, Daily changing calendar for both Jewish Calendar and Roman Calendar, slide show of photos of Beth El, Question of the Week (one question polling of congregants)
2. About Us
  - a. Statement of mission, vision, values
  - b. Strategic plan
  - c. New congregational covenant
  - d. Who’s who re staff: profiles of Rabbis, Executive Director, Director of Education, Early Childhood Director, etc (photos included), all staff (if photo provided we can get to know who everyone is and what they do)
  - e. Who’s who re lay leaders – board, committee chairs (and email addresses), and photos-
  - f. About physical structure, and inquires re rental of facility (inquiries can solicited on line with call backs)
  - g. Historical section (“Part of Berkeley Since 1945”) – includes historical photos which are to be digitized in the near future
  - h. Become a Member: one possible format - here visitors have three choices (1) to fill out an inquiry form that is emailed directly to the Executive Director which is followed up with a phone call or (2) fill out a form which can be sent directly to the synagogue with the understanding that they will receive a call from the Executive Director or (3) print out the form and bring it to the synagogue office and schedule a visit with the Executive Director.

3. News and the Community
  - a. Members-only online directory (with photographs)
  - b. Members-only on-line social network (See Temple Sinai's Facebook page or Temple Isaiah's Ning community) – the purpose being to foster connections and communications among members, discuss upcoming events and programs, etc.)
  - c. Member-only blogs with commentary from other members
  - d. Features upcoming events (and provides background information, where appropriate)
  - e. Calendar
  - f. *The Builder* (and its archives)
  - g. Podcasts related to events/themes (e.g., discussions/interviews with clergy and staff, visiting scholars)
  - h. Links and Resources (to other community events and resources (this could include a link to the URJ website called RJ.org – News and Views of Reform Jews, 10 Minutes of Torah, Jewish Contemporary Museum in SF)
4. Ways to Give
  - a. make donations on line (annual fund, honoring life events, naming opportunities etc) using on line program called “Just Give” (see Sherith Israel's web site <http://www.sherithisrael.org/giving/> - )
  - b. \*Re-assess our category called “eScrip” – how well do we communicate this opportunity, what it is all about, how does it work?
5. Prayer and Jewish Life
  - a. Shabbat
  - b. High Holidays
  - c. Holidays and Festivals (photos, how we celebrate them)
  - d. Minyan
  - e. Life Cycle Events (see below)
  - f. Conversion and Choosing Judaism
  - g. Glossary of Jewish terms commonly used in the Beth El community
  - h. Adult Choir
  - i. On-line music (blessings for the holidays, for services, etc.) see website of Temple Israel, Omaha, Nebraska – <http://www.templeisrael-ne.org/study/classroom/#cprBlessings>
6. Music at Beth El
  - a. Adult Choir
  - b. Other programs in the making?
  - c. On-line music
7. Programs for Adults at Beth El
  - a. Jewish Studies
  - b. Adult B'nai Mitzvah
  - c. Torah Study
  - d. Scholar lectures
  - e. Adult Choir

- f. Requests and Suggestions for a program or event in which members are encouraged to make a request on line (providing their name, email, phone number and suggestion/request)
- 8. Building Community – Inside and Out! Groups for Adults (all groups have a contact person’s name and email address for inquiries as well as online signup/interest forms if applicable)
  - a. Social Action
  - b. Homeless Meal
  - c. Join a *Havurot*
  - d. Chai Group
  - e. Shabbat Shalom Corp
  - f. Mitzvah Day
  - g. Ruach Brigade – Get Involved – Become a Volunteer
  - h. Pantry Chug
  - i. Neighborhood Groups (project currently being developed by Ruth Ehrenkrantz in which congregants are organized into small groups according to neighborhood (e.g. Zip Code) and get together 3-4 times per year for Havdalah potluck, picnic, bagels and lox in the park, rides to synagogue for the elderly, etc.
  - j. Requests and Suggestions for a program or event in which members are encouraged to make a request on line (providing their name, email, phone number and suggestion/request)
  - k. Israel – (currently there is one photo) photos of past trips, and information about coming trips, and statement of our position on Israel
  - l. Help Needed! On this page there are short term/time delimited/frequently updated requests for volunteer assistance that describes the task, time, place and contact person, along with RSVP capacity
- 9. Kids and Families
  - a. Chug Michpocha – family education program
  - b. Annual Family Retreat
  - c. Celebration of Festivals (Hanukah, Purim, etc) photos
  - d. Requests and Suggestions for a program or event in which members are encouraged to make a request on line (providing their name, email, phone number and suggestion/request)
  - e. Youth Groups
- 10. Education
  - a. Early Childhood
    - i. Welcome from director
    - ii. Baby group
    - iii. Nursery school – with links to full program description, application forms, etc
  - b. Religious School
    - i. Welcome from director
    - ii. Links to full program description and application forms with online enrollment option

- iii. Describes various options (Chug Mischpocha, confirmation classes, etc)
    - iv. Photos for every page
  - c. Adults Learning
    - i. Jewish studies and Hebrew Classes
    - ii. Torah Study
    - iii. Adult B'nai Mitzvah
    - iv. Scholar lectures
    - v. Choosing Judaism
- 11. Life Cycle Events
  - a. Brit Milah
  - b. Baby Naming
  - c. B'nai Mitzvah
  - d. Confirmation
  - e. Anchei Mitzvah (adults)
  - f. Weddings
  - g. Funerals
  - h. Cemetery
- 12. Photo Gallery (history photos can be displayed here as well)
  - a. Could also include historic photos of Beth El in our archives (soon to be digitized)
  - b. A photo gallery and website that emphasizes digital images requires that several Beth El members accept the responsibility for taking photographs at events and send them into the webmaster for regular incorporation and updating of website
- 13. Calendar (multiple ways of finding it)

Congregational Websites worth a second look:

<http://www.betham.org/> Los Altos Hills, Ca (note: see Beth Am's *Builder*, a link redesigned by our own Lisa Cain)

<http://www.templeakiba.net/> - Culver City Ca

<http://www.shirhadash.org/> - Los Gatos, Ca

<http://www.tbeaptos.org/index.shtml> - Aptos, Ca

<http://www.bnais.com/> - Sacramento, Ca (interesting calendar example)

<http://cbisd.org/> - San Diego Ca

<http://rodefsholom.org/> - San Rafael Ca

<http://www.or-hadash.org/> - Sandy Springs, Ga (Atlanta Area)

## Appendix F

### Strategy #5: Programming

Since the inception of the discussions of the Strategic Planning Committee, the issues around serving our current congregants well, and attracting others, have focused on what is perceived as our largest gaps—namely, keeping our adult members after key transitions in the lifecycles of their families (finishing pre-school, completing bnai mitzot studies, graduating from Midrasha, children leaving for college). There were several key items that we noted:

1. The array of outstanding programming for which Beth El has been known has been very child-focused
2. The “drop off/pick-up” culture of parents whose children attend those programs
3. Little apparent overall strategy or themes linking programming
4. Little easily accessible historical data on past programs, requiring each re-enactment of a program to require planning almost from scratch
5. No reliable evaluations of programs to determine whether they were successful, ideas for change, and what components worked especially well and should be retained
6. Communications channels have not always functioned optimally and new technologies should be embraced (while showing consideration for those not technologically facile)
7. Lack of a staff position as Program Coordinator
8. How our indoor and outdoor spaces are being used

#### Process

The work of the Program Subcommittee has tried to address two major areas:

1. Creating a database on current programming
2. Reviewing what our “competition” and/or potential partners and other expert sources on adult programming are doing.

We designed a questionnaire and distributed it on Survey Monkey, to collect program description data for eight programs. Eileen Crumm transformed the draft questions into the Survey Monkey format. Norm provided us with the list of people (staff, Board members and volunteers) to whom the survey should be sent. The directors of two additional “programs” (the Library and the Gift shop) did not feel that their activity fit within the survey design framework, but we did collect some information about both of them. The description of the functioning of the Library was particularly illustrative of some of our staff vs. volunteer and financial challenges, since it apparently is both physically and financially subsidized by one family. A task that will be completed later and made available to everyone at Beth El who runs an event will be a template for a one-time program evaluation and a request to complete a program “how to” archive that will be accessible on line.

The second major activity was trying to determine what kinds of activities other Jewish organizations in our Bay Area neighborhood were offering, what kinds of programming advice was available from sources such as URJ. The websites were reviewed and key individuals were contacted. Ann Gonski was responsible for the URJ review and some key informant interviews. Adele Amodeo reviewed the offerings of other organizations. Also reviewed was the Berkeley Parents' Network and Yelp, just to get some better information.

Other offerings:

We examined websites from the following:

1. Chochmat Ha Lev
2. Temple Isaiah, Lafayette
3. Temple Emanu-El, San Francisco
4. The JCC of the East Bay
5. The Aquarian Minyan, Berkeley
6. Temple Beth Abraham, Oakland
7. Kol Shofar, San Rafael
8. Rodef Shalom
9. Temple Sinai, Oakland
10. Netivot Shalom, Berkeley
11. Kehilla Community Synagogue, Piedmont

We researched under headings of Adult Education, Family Education, Tikkun Olam, Social Justice, Seniors, and a couple of others. The printouts are available as an Appendix (47 pages).

### **Findings:**

Several observations emerged:

- Beth El offers many of the same types of programming as is available in these other facilities—perhaps not as consistently, but we should be proud of what we do have to offer
- The program descriptions and how they are organized differ from institution to institution—and it appears that, as has already been discussed in the Communications Subcommittee report, redesigning our website and improving our marketing of what we have available may help a great deal
- Other facilities seem to do more in terms of partnering with other organizations—Beth Abraham offers a woman's torah study group for all East Bay women and an evening of Oakland Learns Together for all four Oakland synagogues
- Synagogue space is used for non-religious purposes: yoga classes, kindergym, art classes, job-seekers support groups
- Programs that are peer-led are specifically identified, including Mah Jongg, Scrabble and bridge groups
- Child care is regularly offered for programs, as is food

- Chavurot were formed around interests such as ecology or breast cancer survivors
- The naming of certain activities seemed more inviting: the lunch group for Temple Sinai seniors is called “the Lunch Bunch” and at Emanu-El, the Ladies Who Lunch; again, marketing is the issue here.
- Many of the websites showed what kinds of lectures or special programs had occurred earlier in the year, and/or had podcasts or slides available
- Programming occurred in different locations: congregants’ homes, other community center facilities, etc., different times of the day, or days of the week
- Many offerings were focused on people new to Judaism or who had been raised in secular homes (or, in fact, orthodox homes)—such things as “Pardon the Interruption Learner’s Service” for Shabbat or tapes of common songs for congregational use or for teaching the Passover services
- Popular class offerings also seemed to be discussing the Reform position on such things as Kashruth, or Mikvahs
- Bringing in local Jewish authors for book discussions and/or creating a Rabbi’s book club (NOT meeting monthly) seemed popular
- Many of these offerings were free; an equal number were fee-based
- Volunteers are sought for many things, including developing programs of their own choosing
- Family events that help the adults make connections with other adults, beyond the children’s needs

Looking at the back-and-forth discussions on the Berkeley Parents’ Network, not surprising was the general level of high praise for the Nursery School and for Kee Tov. What was mentioned just as often, however, with a great deal of positive energy, was the welcoming atmosphere for non-Jewish and/or non-observant partners.

#### Lay-led Adult Programming Possibilities

In addition to strengthening the existing programs for youth and families, we need to consider different kinds of adult programming strategies that are based on: 1) adults already connected to synagogue life through their children, 2) adults with Jewish interests, and/or 3) adults with different areas of expertise. For example, groups of adults already connected to the synagogue could include:

- Adults with pre-schoolers interested in educating their children at home
- Adults with pre-schoolers in the Beth El Nursery School
- Adults with children in the Youth & Family Education
- Adults with children in the B’nai Mitzvah Program
- Adults with children attending Camp KeeTov
- Adults with children attending Midrasha
- Adults with empty nests who are in-laws/grandparents of inter-faith children
- Adults carrying for aging parents
- Adults who share interests with other seniors or with those connected to inter-generational programming

With regard to adults with special interests, there are unlimited possibilities for lay-led programs that include:

- Developing non-religious programs (yoga classes, kindergym, art/culture classes, job-seekers support groups, and various recreational programs) using synagogue space (indoors and outdoors)
- Developing Chavurot built around special interests (ecology, cooking, breast cancer survivors, etc).
- Developing neighborhood programs using member homes and local parks
- Sharing the highlights of weekly Torah Study online
- Sharing Rabbi's sermons online
- Forming Jewish book groups
- Creating "Pardon the Interruption" Learner Services
- Sharing music of common prayers online
- Co-sponsoring lectures with Lehrhaus, JCC, and other congregations

The third area for possible lay-led adult programming might build upon the multiple talents reflected in the occupational profiles (based on the 14 largest occupational groups of members)

- Lawyers and judges – Jewish Law and Ethics
- Teachers and educators – Moving Beyond the Adolescent's Understanding of Judaism
- Managers (program, middle & senior) and management consultants – What's Jewish about Leadership?
- Psychologists, social workers and therapists – Jewish Perspectives of Family Function and Dysfunction
- Professors – Jewish Life on Campus
- Physicians and health care professionals – Jewish Ethics at the end-of-life
- Retirees – The next career and Jewish volunteering?
- Writers, journalists, editors, publishers – Communicating with a Jewish audience
- Marketing, advertising, graphic design, media – Applying expertise to Jewish issues and organizations
- Scientists, researchers and analysts – Science and the Jewish experience
- Architects, designers, surveyors, inspectors – What's Jewish about greening the built environment?
- Computer programmers, software engineers, web designers, animators, database designers – What's Jewish about knowledge sharing?
- Homemakers – Jewish cooking in the gourmet ghetto
- Artists (dancers, musicians, actors) – What's spiritual about the Jewish cultural arts?

## **Recommendations:**

1. Have the remaining programs complete the Program Survey and do a more complete analysis of the results
2. Develop an archive of program history
3. Develop and use an evaluation template of each event to be stored with the “how to” archive
4. Look for more partners and community-wide events—especially important outreach to the unaffiliated
5. Use the website more effectively to publicize and cross-publicize events
6. Develop a multi-pronged marketing strategy to update our image, our offerings and our use of social networking and on-line technologies
7. Develop a focal point on the staff or as a volunteer position—a coordinator of volunteer opportunities, with a more specific job description
8. Seek volunteers regularly—develop a volunteer skill data base; acknowledge those volunteers
9. Use our lovely outdoors as much as possible
10. Make sure that our congregants know that this is really their second home by encouraging them to use the smaller rooms for meetings, mah jongg playing, or other gatherings
11. Work with Peets and/or a local bakery to have delicious and healthy snacks and coffee available for parental schmoozing.

More specific assistance can be requested from URJ and other adult education consultants abound, who might be available for some pro bono consulting.

## Appendix G:

# Identifying Improvements and New Uses of Our Synagogue Facilities & Grounds

Alex Bergtraun

### I. Leveraging Our Building and Grounds

*Tikkun Olam:*

"The most modern and broadly understood notion of Tikkun Olam is that of "repairing the world" through human actions. Congregation Beth El in Berkeley attempted, in the planning and building of it's new home, to take ownership of their part in Tikkun Olam.

*The Essence of this building complex:*

(words of Rabbi Alan Lew, Rabbi Emeritus of Temple Beth Shalom, San Francisco):

"We are formed by the places we inhabit; their shapes become the shapes of our souls.

We strive for a place that says:

" You are welcome here, you will find healing here, you are about to enter a different kind of place, a holier place, a place of deeper spirituality, a more nurturing place than the one you are accustomed to occupying at work and on the street.

But most importantly, it should be a place with God at its center not way up in the distance."

*Today "It Takes a Village":*

The original "Mishkan": Was a solution to a design program for a nomadic group w/ a very hierarchical society

The "Mishkan" of Beth El: Is a design solution for a very heterogeneous Jewish community celebrating the varied elements that create Our society of Today:

Beit Tefillah : House of Prayer

Beit Knesset : A place of communal gathering

Beit midrash : House of Study

*Create a "Book" and a "Webpage":*

Describing the many opportunities that we have created as a Kehilla Kedusha on this place on Earth through the specifics of its:

**Site planning:**  
**Creek Restoration:**  
**Trees and Plantings:**  
**Site construction work:**  
**Energy / Utility Usage:**  
**Lighting: Natural & Artificial:**  
**Material Usage:**  
**Indoor Air & "Spiritual" Quality:**

*The Beth El "Green Building" List:*

**Site planning:**

- The overall building form was created to form a sense of "Wholeness" with its site, embracing the land, opening it up towards Codornices Creek which runs through the heart of the property.
- Site Orientation was set up for future installation of photovoltaic solar roof tiles on south facing roofs
- Since the property spans between two major thoroughfares of Berkeley (Spruce & Oxford Streets) the site complex was laid out with complete pedestrian access in mind, both able-bodied and disabled access, equally.

**Creek Restoration:**

- A very large process was undertaken for restoration of the open portion of the creek while a "No Build" zone was maintained to allow for the future possibility of opening up of the culverted portion of the creek.
- Since water is inextricably tied to the Jewish faith, spiritually and programmatically, the creek was a welcome inclusion to the overall building design incorporation.
- The restoration process itself integrated the recycling existing logs and Native planting into its overall plan.
- Special fossil filter drains were incorporated into the driveway design.
- A Riparian interpretive area has been begun at the center point of the creek in the site design.

**Trees and Plantings:**

- Xeriscape native planting and irrigation principles were the focus of the landscape design.
- Riparian plantings were installed to reinforce the importance of the creek
- Protection of existing on site Oaks was a key piece of the Nursery School yard design.
- Evergreen plantings around perimeter towards neighbors give year round shielding to them.
- Deciduous tree bands towards the site's center reinforce the feel of the change of seasons
- Tie in w/ programs: Tu B'shvat planting events annually  
Nursery School vegetable garden integrated into yard design.

**Site construction work:**

- All site demolition waste was precisely recycled per Berkeley City Green standards.
- Delicate balance of cut and fill of soil on site.
- Re-usable formwork was utilized for concrete basement walls.
- Permeable pavers were used for the central courtyard.
- ICF blocks were used for Nursery School perimeter sound walls to eliminate wood usage.

**Energy / Utility Usage:**

- The first Geothermal Heating system in Berkeley was created for this project.
- Radiant Heat was installed for the entire Nursery School Floor.
- Attic fans and extensive roof venting were incorporated for the Religious School Wing.
- The entire building was Insulated, and all windows were double glazed with integral thermally broken window frames.

**Artificial lighting:**

- Daylighting studies were made to make sure there was as much light balance as possible in all public and educational spaces.
- Fluorescent lighting is pervasive in building with double switching for additional light/energy usage control.

**Material Usage:**

- The congregation held a "Rock Party" to move excavated rock from the site for re-use in creating the main courtyard terrace cascade.
- Fly-Ash concrete was used in all non-visual (structural only) concrete areas.
- Extensive use of Glue Laminated wood framing members (Truss Joists, LVL's, Paralams & Light gage wood trusses) to reduce overall wood consumption.
- HardiBoard cementitious (non-wood) paneling and integral color stucco used for all exterior cladding of building.
- Finger-jointed wood trim used throughout to conserve wood usage.
- Integral color concrete flooring on all public circulation spaces
- Renewable cork flooring on Sanctuary, Social Hall and Library spaces
- Natural Linoleum flooring used in Religious School Hall gallery space.
- Carpet tiles recycled from another project were used in all Religious School classrooms.
- Kitchen appliances all as efficient as possible
- Plumbing fixtures all C.E.C. approved

**Indoor Air & "Spiritual" Quality:**

- Low V.O.C. paint / water-based finishes used throughout
- Tried to eliminate the use of all formaldehyde-borne materials in cabinetry.

- Elements of the previous synagogue building were re-used in the new building:
- All Sanctuary furniture re-used mahogany from old building saved by teams of congregants.
- Rosette window of old building was reinstalled in new Sanctuary
- Front doors of old building were reinstalled in new Sanctuary Garden as sculpture.

## **II. Beth El Facilities Ideas**

*Main Spaces to be Assessed for Usage/Rental:*

- Social Hall
- Beit Midrash
- Sanctuary
- 8 Classrooms (including "green" room and room between Sanctuary & Social Hall)

*Making Better use of our Existing Resources:*

- Rent of facilities for Parties / Events / Bar Mitzvahs (Internal)
- Rent of facilities for Parties / Events / Bar Mitzvahs (External)
- Rent out sanctuary to another Church...?

What is needed to bring spaces/services up to par for this? what is the Cost/Benefit Ratio?

Need photo book of past events (Bar mitzvahs and Galas) to show people what is possible

### 1. Add stage in Social Hall?

- Bigger Musical Events Program (like the one the JCC Campus Palo Alto has initiated... but make it "pay to enjoy")
- Host music events for Private Schools

### 2. Kitchen Usage:

- Start a Cooking School
- Start a targeted/ specific catering development
- Develop Friday Night "Shabbat To Go" boxes picked up at Friday Night service

### 3. Create name tag space

4. Increase NS capacity ( Infant care?)... if bath facilities are adequate and wouldn't need on grade access like NS.

5. Rethink globally the storage for all programs (e.g. Enclose RS Wing "Lookout" to become bulk chair / table storage, free up Room 201 (betw. Sanct. & Soc. Hall) storage for better pantry equipment storage usage, and organize Sanctuary storage space behind bimah)
6. Rethink completely the Gift Shop (including on-line service)  
Possibly create a line of "Shabbat Kits" made by Beth El
7. Create Cafe space somewhere... Bottom of main stairs? Create better hang out space for RS kids / parents at Main Stair Lower Landing: Turn it into a cafe?
8. Get up photos of past events to encourage people to join in.  
Create Central Space (both floors) for these photos

#### *Assessing Building/Grounds Energy Usage:*

1. Energy Audit for geothermal and general energy usage
  - Reduce energy usage
  - Switch out lighting (especially high lighting) to LED
2. Add PV (photovoltaic) array to southerly roof

#### *Giving Back to the Community:*

- Give the Community a better view of us
  - Become a "good genus loci / center" for the Community in the eyes of the City
  - Marketing to the local area that we exist as a great religious institution of which to become a member
  - Make Beth El the North Berkeley Community and Emergency Preparedness Services (get paid/subsidized for doing this?)
  - Community Garden north of creek: City/State subsidies available?
  - Conferences /conventions / Retreats : Tap off of the University's needs.
  - Jewish Film Festival could be "home" in the East Bay @ Beth El...
- Would need window treatments / big screen (collapsible) / DLP projector(suspended) for Social Hall

#### *Developing Exterior Usage:*

1. Homeland Security Grant for fencing
2. Add Bench locations: A naming opportunity
3. Soften up Lower Amphitheatre Space: Replace 30% of the pavers w/ grass type solution
4. Add overhang/ banner system on Amphitheatre Steps
5. Develop Quiet Garden Outdoor Patio Space to make it more comfortable
6. Sports: Add Fitness Course on site
7. Develop Biblical Garden concept and implement in parts w/ overall timeline.
8. Gaga Pit (Asher Bergtraun's 2011 Eagle Scout Project)
9. Continue gardening/gardens
10. Weddings/events: What is needed to increase this usage?

- RS School outdoor classes: What is needed to increase this usage?
- NS School outdoor classes: gardening
- Rent out to other private schools to use garden space?

*Other Funding Possibilities*

1. Revitalize the Memorial Bricks program
  2. Revitalize the Simcha Bricks program
  3. Revitalize the Yahrzeit Plaque program
  4. Add Tzedakah box to upper floor
- Revitalize the Room naming program

*Relationship to Jewish communal resources here at Beth El:*

- Midrasha: Amp up cost for them? or Reduce space?  
or Tweak the time available to them to work better w/ Beth El's needs?
- Kee Tov: Get more \$ back from Camp Kee Tov for Repairs
- Program naming: Make these programs a naming opportunity.... w/ \$'s attached...

*Art as an integral part of Daily Life on the Beth El Site:*

- Art areas: Needing sponsoring donors for
  - Start Visiting Artist(s) in Residence
1. Replace temp. green fencing w/ permanent, artfully created fence/gate system that weaves around lower amphitheatre up to upper Portico Entry.
  2. Create Mission Statement in Main Stair Well
  3. Add permanent display of Seasonal Ritual pieces on Main Stair podiums
  4. Quiet Garden Mosaic Wall
  5. Sanctuary Garden Wall
  6. Amphitheatre Steps 12 Tribes Wall
  7. Social Hall end wall tapestry project
  8. Beit Midrash end wall tapestry project
- Add Sculpture locations: A naming opportunity
9. Add "popsicle sticks" to Sanctuary Ceiling, as originally planned.
  10. Add scrim treatment to back of Bimah, as originally planned.
  11. Keep going on acoustics in Sanctuary
  12. Do acoustic treatment for Gallery space as well

*The Library:*

Develop the Library as originally designed:  
2 spaces:

1. Front: Childrens' space w/ storytelling corner
2. Rear: Talmudic space w/ on-line research center (Jewish magazines/newspapers from Israel/Europe/Latin America, Virtual Internet Judaica research library: Tie in w/ Hillel / Netivot / Magnes)

*Furnishings to augment usage and warm up spaces:*

- Classrooms 215/216: Add Partition where track exists to be able to split rooms up

Commission Furniture pieces for specific locations (using "Green" materials) :

- Beit Midrash:

1. Prayer Book Rack/table
  2. Chair storage
  3. North wall tapestry
- Gallery: 44. More established Art space along walls
- Social Hall
4. Counters/cabinets
  5. At Top Landing of Main Stairs: Built in table/ info. Center for Beth El
  6. Main Stair Middle Podium: Establish Judaica Art Display that is permanent.
  7. Beth El History Display @ Niche off of Upper Elevator Foyer: Add low cabinet w/ counter for display.
  8. Development of Graduation / Midrasha Photo wall in RS Wing.
  9. Further develop lower Presidents Plaques Atrium for hanging out space
  10. Further develop Rabbinic Atrium for lounge space
  11. RS Wing: Move pews to near hall / Add low cabinet storage along far hall w/art display counter along length.

*Signage:*

1. Exterior: Entry Signs off of Oxford and Spruce : Welcoming people in
2. Path directional signage orienting people around site
3. Welcome Banners @ Upper Entry Portico and Lower Entry Portico
4. Interior: Pathfinding signage : Welcoming, artful
5. Environmental: signage related to Tikkun Olam (recycling, water usage, etc.)

*"Book" Back-up to the Facility:*

- Tours / Tour Book : For self-guided discovery of the building & grounds
- Maintenance Handbook: - Annual Calendar / Program of Maintenance tasks
- How To Book: Usage of the building
- Engage congregants in the care of "Their" home

### **III. Beth El Building and Grounds Vision Statement**

**1) We have a Building and now we need to make it "Our Home":**

Need to involve the Congregants in this geographic and metaphoric "Place". Each Beth El constituency needs to take hold of it's role within this "Village"

**2) Building on our congregational history by making history in our new home.**

Make the neighborhood and Outlying Community aware of the asset of our "being here".

**3) We need to get out of "Disaster control" mode w/ the building and grounds.**

Need to get a head of the curve.

**4) Our Religious / Intellectual / Social Goals can find a home here**

Can all find "Place" here.

This "place" is the glue that brings all disparate elements together.

**5) We should live "Artfully" in this Place.**

This should feel different from all other places in our lives.

## Appendix H:

### Congregation Beth El Vision 2020

In the midst of its beautiful facilities and grounds, Congregation Beth El will be known as the synagogue that totally transformed itself into a community where EVERYONE KNOWS YOUR NAME. Building upon the courage and persistence of its founding members 75 years earlier, the congregation enjoys continuing growth and expanding vibrancy of its members who:

- consider the synagogue to be their second home
- experience synagogue involvement as a way to feed their Jewish souls
- enjoy seeing each other on a regular basis
- derive immense pleasure from educating their children in a warm and caring environment
- thoroughly enjoy helping each other gain maximum benefit from their membership through the successfully implemented covenant
- value the diversity of their Berkeley Jewish community as inspiring
- revel in finding members who share similar interests and passions
- embrace leadership roles in welcoming new members, promoting programs and helping the congregation achieve its goals
- take considerable pride in building a Jewish community committed to addressing the needs of its members as well as those of the larger community

The dedication and commitment of Beth El members has served as a magnet in attracting new members who want to be part of the Beth El family. Some of the features of the Beth El community include:

- a keen understanding of *the lifecycle of membership* as displayed by comprehensive in-reach and out-reach programs built on the key concepts of relationship-building (regularly consulting congregants with special expertise, personally inviting congregants to various events, displaying considerable comfort in asking congregants for assistance, and participating regularly in the neighborhood social groups program called “Bagels in the Park”)
- a *life-span learning program for adults* that provides Jewish education beyond the understanding acquired in one’s youth (holiday universities, service learning, inter-faith programs, etc) that expands upon the continuing investment in the education of children and youth
- a dynamic *online presence* for all members that increases communications among members, offers links to Jewish content, and provides for congregants with an informal bartering marketplace

- talented staff who *continuously consult with congregants* by drawing upon their expertise (educators, physicians, attorneys, computer specialists, psychologist, managers, finance specialists, etc.
- talented volunteers who also *draw upon the expertise of congregants*, especially members of the Board of Directors and the Program Coordinating Council consult with members of the congregation by drawing upon their expertise and interests
- a *Leadership Academy* that educates congregants for various roles in the congregation along with leadership succession planning for both adults and youth.

All the programs and activities at Congregation Beth El have become so regionally and nationally recognized that the staff and volunteers are continuously asked to make presentations nationally and internationally based on the experience of transforming a traditional Reform congregation into a thriving center of learning and community building. Congregational Beth El has become one of the models of promising practices in the URJ.