



Seth Adelson  
Rabbi

Kenneth Turkewitz  
Interim Executive Director

Congregation Beth Shalom  
5915 Beacon Street  
Pittsburgh, PA 15217  
Phone: 412-421-2288  
Fax: 412-421-5923  
[www.bethshalompgh.org](http://www.bethshalompgh.org)

Debby Firestone  
President

Dear Beth Shalom Member,

I am writing to share our new Strategic Plan for 2019-2024 with you, approved unanimously by the Board of Trustees on November 19. Beth Shalom has made tremendous strides in transformation since our last Strategic Plan in 2008. But as is so with all institutions, in order to grow successfully there is a continuous need for self-reevaluation. The Congregation's leadership recognized that a new plan for the future was a necessity. With the help of Aimee Close, a representative from United Synagogue for Conservative Judaism, we were able to pinpoint the needed focus areas for our plan. Next, we began a two-year process of envisioning Beth Shalom in the near and longer range future. We understand that change can be difficult but a cooperative and open spirit characterized our discussions. We received a great deal of support from the task force subcommittees and other Strategic Planning committees and especially the writing committee.

Our vision's focus is on four critical areas to meet the needs of our kehillah: financial sustainability, leadership and volunteerism, youth, and member engagement. The next steps will be to begin the implementation phase, which we have divided into one, three, and five year increments.

I am proud of the committees' collective hard work and the finished product. I want to personally thank all of the members who worked so hard to produce this document with the best intentions and realistic goals for Congregation Beth Shalom's future sustainability.

Sincerely,

  
Debby



Seth Adelson  
Rabbi

Kenneth Turkewitz  
Interim Executive Director

Congregation Beth Shalom  
5915 Beacon Street  
Pittsburgh, PA 15217  
Phone: 412-421-2288  
Fax: 412-421-5923  
[www.bethshalompgh.org](http://www.bethshalompgh.org)

Debby Firestone  
President

To the Membership of Congregation Beth Shalom:

My family and I are grateful that we landed here in Pittsburgh, and that you have given me the opportunity to continue to be your spiritual leader, already for more than four years.

I am especially grateful now that we have completed this strategic plan, 21 months in the making and incorporating the hands-on work of fifty-odd members plus the input of hundreds of others. I am grateful for our membership in the United Synagogue of Conservative Judaism, which provided the Sulam for Strategic Planners framework and the support of our USCJ Transformation Specialist, Aimee Close. I am extraordinarily grateful for the direction and partnership of President Deborah Firestone and the Executive Committee, who ensured that this project kept moving when the momentum began to flag. I hope that you will join me in this gratitude.

Beth Shalom, with 102 years of history, may now look forward with zeal and optimism to the future. We read in Pirkei Avot (1:2) the words of Shim'on HaTzaddik:

על שלשה דברים העולם עומד, על התורה ועל העבודה ועל גמילות חסדים.

The world stands upon three things: the Torah, service to God, and acts of lovingkindness.

The monumental effort that we have put into this project as a community will, I am certain, be returned to us manifold; the sustainability and cultural change that this plan will yield over the next five years will guarantee our community's presence as the pre-eminent center of Jewish learning and practice in Western Pennsylvania.

יישר כוחינו!

*Yishar koheinu!* May our strength continue to lift us up!

Rabbi Seth Adelson



# Securing Our Future

Congregation Beth Shalom Strategic Plan: 2019 to 2024

Respectfully submitted to the Beth Shalom Board of Trustees for approval,

November 19th, 2019,

by the Strategic Plan Writing Team:

- Steve M. Albert,
- Jordan R. Fischbach,
- Deborah A. Gillman,
- Chris Hall,
- Alan Kopolow,
- and Elisa Recht Marlin.

# Table of Contents

Table of Contents	2
Executive Summary	4
The 18th of Heshvan Shooting	4
Vision for Beth Shalom	5
Priority Recommendations	5
Acknowledgements	7
Introduction	8
Background	8
Successes	8
Challenges	9
Membership Survey	10
Community Conversations	11
Emerging Themes from Strategic Plan Steering Committee	12
Financial Sustainability	12
Operations	12
Leadership	12
Youth	12
Member Engagement	13
Priority Recommendations and Action Items	13
Overview of This Section	13
Make Financial Sustainability a Priority	14
To be completed by Fall 2020	14
To be completed by Fall 2022	14
To be completed by Fall 2024	15
Cultivate a Culture of Giving	15
To be completed by Fall 2020	15
To be completed by Fall 2022	16
To be completed by Fall 2024	16
Modernize the Synagogue's Leadership Structure	16
To be completed by Fall 2020	17
To be completed by Fall 2022	17
Further actions to consider if time permits	17
Expand the Profile of Youth and Families in Institutional Planning	17
To be completed by Fall 2020	18
To be completed by Fall 2024	19
Make the Synagogue More Welcoming	19

To be completed by Fall 2020	20
To be completed by Fall 2022	20
To be completed by Fall 2024	20
Further actions to consider if time permits	21
Improve Member Engagement	21
To be completed by Fall 2020	22
To be completed by Fall 2022	22
To be completed by Fall 2024	22
Further actions to consider if time permits	22
Implementation Plan	23
Strategic Plan Implementation Team	23
Sharing the Plan	24
Key Actors in Ensuring Plan Implementation	24
Tracking and Reporting Progress	25
Quick Wins	25
<b>Appendices</b>	<b>27</b>
Appendix I - Fact Book Materials	27
Appendix II - Full Task Force Reports	27
Appendix III - Grouping Work Session	27
Appendix IV - Detailed Implementation Table	27
Appendix V - Proposed Mission and Vision	27

## Executive Summary

Congregation Beth Shalom celebrated our synagogue centennial in 2017. As we begin our next century, we find ourselves at a moment of transition. The last few years have seen positive momentum in many ways, including increased membership, reinvigorated religious services and practice, and growing adult education and engagement opportunities via our *Derekh* initiative. Even as we celebrate recent successes within our *shul*, however, we continue to face existential financial and infrastructure challenges, as well as membership trends that affect the entire Conservative movement. The loss of eleven members of our Pittsburgh's Jewish family in last year's horrific shooting attack adds further uncertainty and concern about what comes next for our community. As a result, we face a present and future where Beth Shalom's financial and leadership model must adapt to survive.

Given the long-term challenges, Beth Shalom decided to embark on a strategic planning process in spring 2018, and began work in earnest in the fall. Through this approximately year-long process, we sought to better understand the recent evolution of the synagogue since its last plan was developed in 2008, identify current strengths and weaknesses, and highlight a set of priority recommendations and actions to implement over the next five years. We took an approach oriented towards continuity, recommending ways for Beth Shalom to continue to be and do all of the things our current members expect. This plan represents the collective work of dozens of synagogue leaders, supported by professional staff, and provides a framework for Beth Shalom to adapt and thrive in the near-term and for decades to come.

## The 18th of Heshvan Shooting

As of this writing, we find ourselves in the weeks between the October 27th anniversary of the 2018 Pittsburgh synagogue shooting and the *yahrzeit* for the 11 victims, *zikhronam livrakhah*, who were neighbors, friends, and Beth Shalom *minyan*-goers. This week, we participated in acts of *hesed*, Torah study, and community memorial events; on the 18th of Heshvan we will mark the *yahrzeit* in shul on Shabbat morning. No one in Squirrel Hill was untouched by the tragedy. And although Beth Shalom is blessed to have our congregation and space intact, we too were shaken and are only beginning to reckon with the reverberations of these events. We are now the temporary home for one of the displaced congregations, and our weekday morning *minyan* is shared with another.

To try to complete this strategic planning process in the shadow of such shattering violence is to be humbled and reminded that no one can see what the future will bring. But the fact of the shooting brings home the importance of strong Jewish institutions that can serve as a comfort and refuge for those affected by tragedy. Our hope is that this planning work will strengthen our *shul* and allow us to continue to be a welcoming friend and neighbor as the Pittsburgh Jewish community responds to tragedy, renews our shared commitments, and builds towards a peaceful and sustainable future.

## Vision for Beth Shalom

A key part of the strategic planning process is communicating the overall direction of the synagogue to our membership. The vision outlined below provides a brief encapsulation of this new direction. This vision guided our work on this plan's focused recommendations, but also encompasses activities across the *shul* as a whole.

Specifically, we envision a congregation:

- where every member cherishes their *shul* connection, expressed through participation, volunteerism, and a culture of giving;
- that operates sustainably and in a way that reflects our values;
- that celebrates children and youth as integral to our entire intergenerational community;
- that embraces diversity, inviting individuals and families of all backgrounds to grow Jewishly and help lead our community;
- where programs deepen and enhance our members' connection to *halakhah* (Jewish law), Jewish culture, and Israel;
- where the study of Torah, practice of Judaism, and the pursuit of justice lead to improving our own lives, our community, and our world.

In an appendix to this plan, we also propose language to consider when updating Beth Shalom's Mission Statement.

## Priority Recommendations

We identified six priority recommendations and 37 associated actions to implement over the next five years. The themes that came out of the strategic planning process were evolved by four task forces into concrete action items.

Our priority recommendations can be summarized as follows:

1. Make Financial Sustainability a Priority
2. Cultivate a Culture of Giving
3. Modernize the Synagogue's Leadership Structure
4. Expand the Profile of Youth and Families in Institutional Planning
5. Make the Synagogue More Welcoming
6. Improve Member Engagement

The first two categories, focused on financial sustainability, should be considered the highest priority items. Without a solid financial foundation, the synagogue does not have a viable future. The other recommendations, however, are also essential to building long-term sustainability. A modern and effective leadership structure is needed to enact the recommendations found in this document. Volunteerism, member engagement, and a strong place for families in the synagogue are all needed to excite our community, encourage our members to dedicate their time and resources to Beth Shalom, and make our *shul* a welcoming place for new members.

For each recommendation, this plan describes actions to be completed over the next one, three, or five years, along with the leaders, staff, and other resources needed to carry them out. The document also describes a plan for tracking and reporting progress on implementing these actions, which includes standing up a new Implementation Team.



## Acknowledgements

We gratefully acknowledge the lay leaders, congregants, and staff who generously contributed their time, attention, and ideas to this plan. A special *Yishar Koah* to the following:

- Strategic Plan Steering Committee: Rabbi Seth Adelson, Steve M. Albert, Mark Fichman, Debby Firestone, Honey Forman, Ed Frim, Seth Goldstein, Cindy Goodman-Leib, Jessica Hammer, Tammy Hepps, David Horvitz, Adam Kolko, Alan Kopolow, Rabbi Jeremy Markiz, Hazzan Rob Menes, and Jennifer Murtazashvili.
- Financial Sustainability Task Force: Alan Kopolow (co-chair), Hazzan Rob Menes (co-chair), Mitch Dernis, Lynn Hecht, David Horvitz, Morris Horvitz, Joe Jolson, Stanley Maharam, Elisa Recht Marlin, Mike Samuels, Mindy Shreve, and Mike Siegel.
- Leadership and Volunteerism Task Force: Jordan R. Fischbach (co-chair), Debby Firestone (co-chair), Rabbi Seth Adelson, Ria David, Rebecca Elhassid, Jay Fingeret, Debbie Graver, Tammy Hepps, Ilyssa Manspeizer, and Fern Steckel.
- Youth Task Force: Debby Gillman (co-chair), Adam Kolko (co-chair), Youth Director Marissa Tait (co-chair), Debbey Altman-Diamant, Ina Engel, Rabbi Mark Goodman, Judith Kadosh, Hadassah Max, Carol Smith, Bryce Tallon, and Roger Zimmerman.
- Membership Engagement Task Force: Jessica Hammer (co-chair), Rabbi Jeremy Markiz (co-chair), Stephanie Aaronson, Rabbi Seth Adelson, Steve Albert, Natasha Berman, Joel Greenhouse, Lois Kopolow, Adam Perer, and Laurie Zions.
- Beth Shalom Staff - Interim Executive Director Ken Turkewitz and Rabbi's Assistant Audrey Glickman.

We are also immensely grateful for the support received from the United Synagogue of Conservative Judaism's *Sulam for Strategic Planners Program*, and give our sincere thanks to USCJ Transformation Specialist Aimee Close.

## Introduction

We, the Strategic Plan Writing Team, offer this document to the Board of Trustees of Beth Shalom as a guideline for securing a sustainable future for our synagogue for the next five years and beyond. While a small number of people drafted this document, it represents the hard work of many, many more. We have drawn from the labor and insight of those who worked on task forces, participated in planning meetings, and filled out surveys - more than two hundred individuals in all. Everyone who contributed their time and effort to this work did so because they value this community and want to see it continue to be successful for the long term. We hope that the Board will accept the recommendations of this document and will quickly convene an implementation team to see that they are carried out successfully. We thank you for your time and attention.

## Background

The strategic planning process that lead to Beth Shalom's new Mission and Vision began with an initial application to the Sulam for Strategic Planning (SSP) program of the United Synagogue of Conservative Judaism (USCJ) developed by the Executive Director, President, and Rabbi. The planning process followed procedures developed by USCJ. After our application passed the competitive admission process, a steering committee for the strategic planning process formed. This group of 15 members began work in fall 2018. We were advised throughout the year-long process by Aimee Close, a USCJ transformation specialist. We followed the USCJ protocol, beginning with the completion of a structured Fact Book based on *shul* records and community demographic surveys. We then developed a *shul* membership survey and conducted a community conversation. The steering committee reviewed these materials and developed an initial set of four priorities. A task force was then formed for each of the priority areas to develop in-depth planning for each. Finally, the chairs of each task force formed a writing committee to harmonize these reports, integrate them into a unified strategic plan, and articulate a mission and vision for Beth Shalom as an outgrowth of this process.

## Successes

The shul has some clear strengths that have developed in the last five years.

- **Young families have brought much needed energy and passion to Beth Shalom.** The Early Learning Center preschool drives membership and serves as an important source of revenue for the shul. Shabbat-oriented programs for children, such as Shababababa, have also been very successful in bringing in young families.
- **Programming for adults has been very successful under the *Derekh* umbrella.** This community-wide programming initiative was established in 2016, and it has grown quickly, attracting 2,900 encounters across 168 events in the 2018-2019 fiscal year. It engages members by offering a wide variety of programs, including three different

weekly study programs, a synagogue trip to Israel, and speakers from across the country.

- **Religious services have been vibrant and have offered a wide variety of opportunities for lay leadership.** As well, the shul boasts the only egalitarian daily *minyan*, which was a particularly meaningful service to the community in the wake of the 18th of *Heshvan* synagogue shooting.
- Finally, but not least importantly, **the synagogue has successfully found a new Senior Rabbi**, Seth Adelson, and the membership has been very pleased with his leadership.

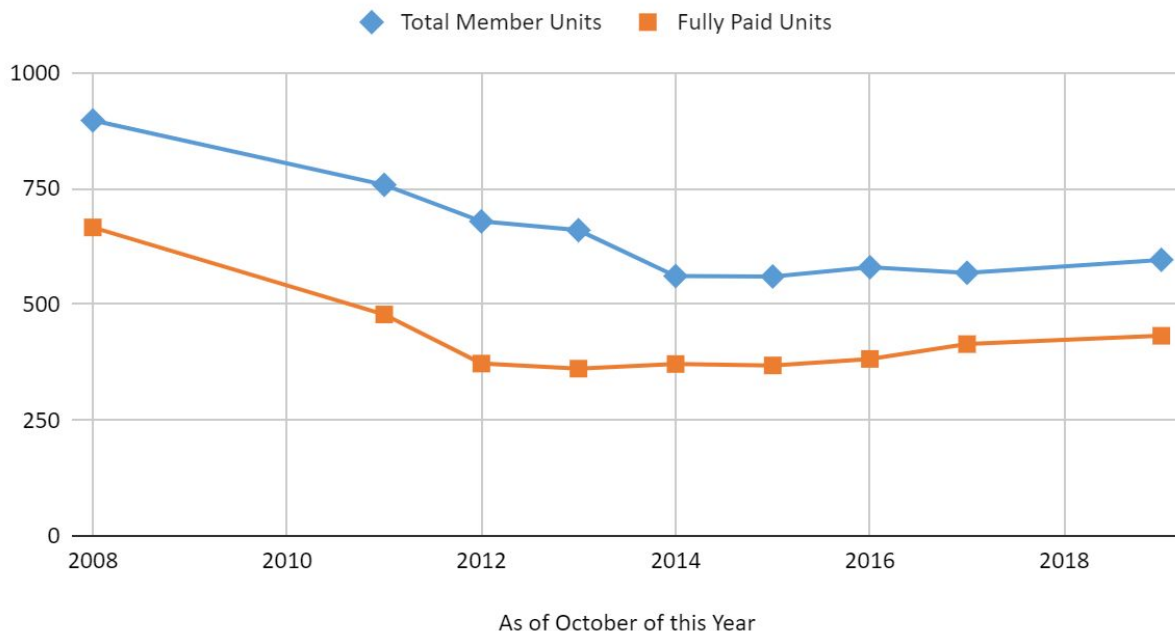
Because these areas of the synagogue are working successfully, the strategic planning committee is not specifically recommending changes. We expect the synagogue will continue to support the growth and evolution of these key areas so that they will remain a foundation for the future.

## Challenges

Despite these successes, **the synagogue faces existential threats due to budgetary concerns.** Expenses have consistently outpaced revenues for much of the past decade. This shortfall was only resolved by depleting our unrestricted endowment.

A review of trends in membership, finances, and programming over the prior decade (2008-2019) shows that **Beth Shalom has faced dramatic changes to which it has not fully adjusted.** Synagogues nationally have faced a trend of declining membership, also reflected at Beth Shalom. Our membership fell from about 897 member units in 2008 to a low of 561 in 2014. Fully paid member units, a key indicator of the financial health of the shul, similarly fell during this period. Active membership in service arms (Men's Club, Sisterhood) has also declined as younger members have not engaged with these groups. Since 2014, the number of member units has begun to grow again as younger members have begun to join the synagogue, but it is clear that there will not be a return to the large membership numbers of the past. Beth Shalom must adapt to being a much smaller institution than it was a decade ago.

## Total Member Units and Fully Paid Units By Year



The Fact Book shows that, due to declining revenue, **Beth Shalom has not kept up with the expenses of running a large building. We have also accumulated a significant and growing backlog of deferred maintenance.** Opportunities for fundraising, for putting the building on a firmer financial footing, and for anticipating the increasing need for youth programming have begun only recently, with mixed results. The Fact Book analysis clearly shows the need for a stronger culture of giving beyond the past practice of meeting the *shul*'s annual needs or contributing solely for a milestone like the *shul*'s 100th anniversary. Increased and sustainable sources of revenue must be found to keep the synagogue solvent.

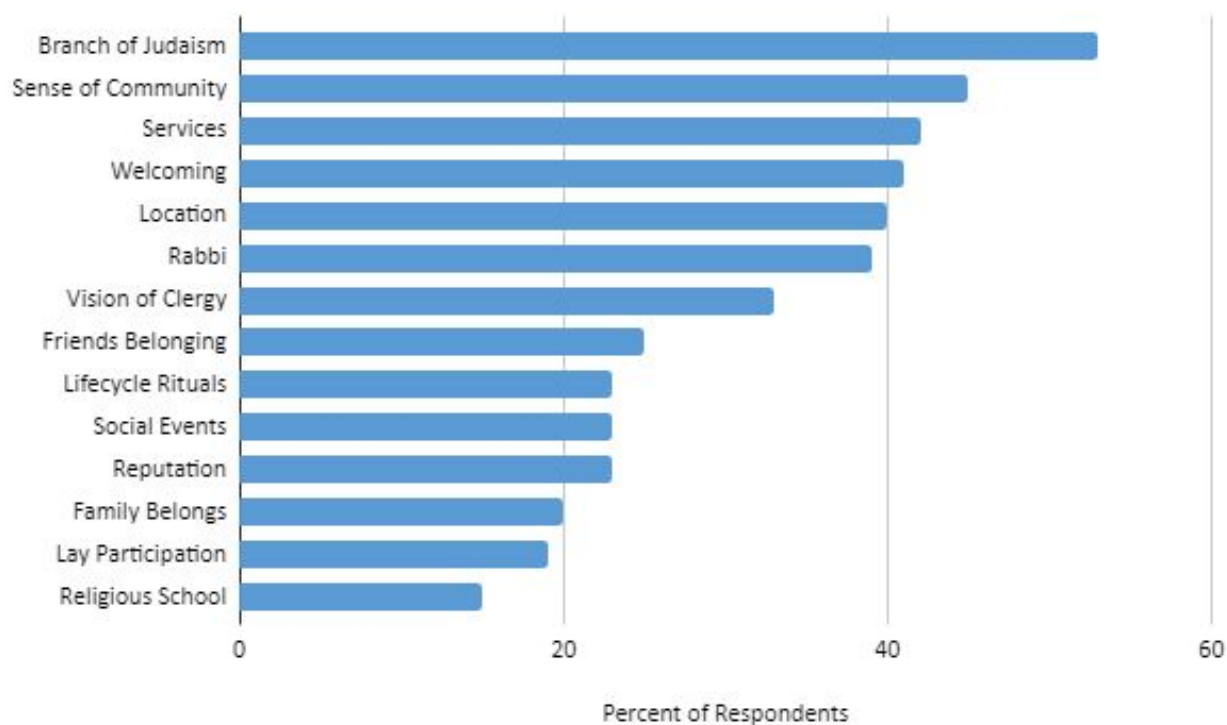
## Membership Survey

From July through September 2018, Beth Shalom members were given an opportunity to complete a survey to share their perceptions of the *shul* and its priorities for the future. Members could complete the survey on a Qualtrics weblink or by paper form. A total of 186 surveys were returned, representing about a third of the people contacted.

The survey captured the full range of membership well. For example, 15% had joined the *shul* fewer than 2 years ago, and 26% were members for over 37 years. 25% reported they were very involved in *shul* activities, but 15% reported no active involvement. The demography of survey respondents closely matched the demographic profile of *shul* membership as a whole. This range is well represented by open-ended comments from members on why they joined Beth Shalom. One wrote, "My parents were members; I grew up at Beth Shalom; I want to continue to be a member." But another stated "We were starting our family and wanted to

engage with the Jewish community in Pittsburgh.” Seventy percent were “somewhat” or “very” satisfied with the *shul*.

The figure below summarizes how members responded when asked which factors were most important to their decision to join Beth Shalom. Conservative Judaism is the most important factor, with over 50% endorsing this affiliation as most important. Sense of community, quality of services, offering a welcoming environment, and location all were ranked “most important” by more than 40% of respondents.



Respondents were also given an opportunity to rank *shul* priorities directly. The top three priorities were “emphasize Conservative Jewish practice and ritual,” “recruit more young people and new members,” and “fully address and resolve financial problems.” Social action, Israel, and adult learning were rated lower. Findings from the survey provide important background the strategic priorities identified below, ensuring that the *shul* is able to continue to be a major center of Conservative Judaism in Western Pennsylvania.

## Community Conversations

A single community conversation was held on May 19, 2019 to try to add the voice of *shul* members who may not have participated in the membership survey. About 15 members participated and added additional perspectives, mainly centering on youth programming.

## Emerging Themes from Strategic Plan Steering Committee

The Strategic Plan Steering Committee conducted a series of data debrief sessions to assess membership survey and Fact Book results. Five priority areas emerged: Financial Sustainability, Operations, Leadership, Youth, and Member Engagement. For each priority area, we identified the following themes:

### Financial Sustainability

- No building fund requirement (from Fact Book)
- Dues lower than other local congregations (from Fact Book)
- No significant fundraising over the last several years except for Centennial (from SSP application)
- \$4M operating budget including preschool (from SSP application)
- Fundraising in 2018 was up significantly (from committee discussion)

### Operations

- Interior and exterior signage is an issue (from survey)
- Deferred maintenance is a serious issue (from survey)
- There are accessibility issues (from survey)
- Question of whether it has become unaffordable to maintain the building (from survey)

### Leadership

- Lay leaders do not have clear job descriptions (from Thriving Congregation Assessment)
- Board and committees do not have goals (from Thriving Congregation Assessment)
- No leadership pipeline (from Thriving Congregation Assessment)
- Lay leaders are seen as apathetic, not transparent or accountable, and not friendly (from survey and committee discussion)
- Not much of a leadership bench (committee discussion)
- Participating in Sulam for Emerging Leaders (committee discussion)
- Difficulty in engaging and retaining volunteers (committee discussion)

### Youth

- 40% of Jewish children in Greater Pittsburgh are under 5 years old (from Federation study)
- Beth Shalom member families have 239 children 0-18 (from Fact Book)
- There were 12 *benei mitzvah* in 2017 (from Fact Book)
- USY membership has gone from 60 to 15 in the last ten years (from Fact Book)
- 20% of Jewish youth grades 6-12 are in a youth group (from Federation study)
- J-JEP (Joint Jewish Education Program of Pittsburgh; shared with Rodef Shalom) grew from 25 to 58 students in 6 years (from Fact Book)
- Member families desire for greater teen involvement in Shabbat service (from SSP application)

- Observations about lack of teen programming and reduced teen presence (from survey)

## Member Engagement

- Issue of how new members are welcomed and integrated (from survey)
- Derekh/5 Portals – bold vision – Has it been communicated? Is there communal buy-in?
- Is Beth Shalom perceived as unfriendly or cliquish? (from survey)
- Many members seem to remain out of “inertia” (from survey)
- Only 30% of members are very satisfied (from survey)
- Many newer members are young families (from Fact Book)
- Lots of people seem to be interested in doing more *hesed* work (from survey)

The five areas were later consolidated into four: Financial Sustainability, Leadership, Youth, and Membership. Operations was folded into Financial Sustainability. Task Forces for each priority took up the challenge of developing specific strategic plans. These Task Forces, consisting of 8-12 members each, met intensively through the spring and summer of 2019, and each Task Force produced a written report laying out key background information, strategic objectives, and recommended actions to achieve those objectives (see Appendix II) . A Writing Committee integrated these reports into this strategic plan document, completed in November 2019.

## Priority Recommendations and Action Items

### Overview of This Section

The themes that came out of the strategic planning process were further developed by the four task forces into concrete action items that are detailed below. The first two categories, **Make Financial Sustainability a Priority** and **Cultivate a Culture of Giving**, should be considered the highest priority items. Without a solid financial foundation, this synagogue does not have a viable future. The other recommendations, however, are also essential to building long-term sustainability. A **modern and effective leadership structure** is needed to enact the recommendations found in this document. **Volunteerism, member engagement, and a strong place for families** in the synagogue are all needed to excite our community, encourage our members to dedicate their time and resources to Beth Shalom, and make our *shul* a welcoming place for new members.

Each of the four sections below starts with an introduction that provides useful background and an overarching vision for that category, followed by specific action items organized by targeted date of completion (either one year, three years, or five years after the adoption of this strategic plan). Please note that an item that is due to be completed within five years does not necessarily mean that it is a lower priority or could not be completed sooner. These action items are detailed more fully in the Implementation Plan section below.

## 1. Make Financial Sustainability a Priority

Beth Shalom has experienced persistent structural deficits and has used its unrestricted endowment to cover operating shortfalls. As a result, substantial deferred maintenance and building repairs have not been addressed. Recent years have had some financial bright spots, including a reduction in annual deficits due in part to a successful Centennial Campaign that brought in donations from members for the first time in several years. But we have not yet demonstrated sustained revenue to address these persistent structural deficits. Running continued deficits is not sustainable.

In addition, our budgets up to this point have not appropriately reflected our values. We have been unable to pay our staff a living wage or offer meaningful benefits. Our Rabbi has an unsustainable workload due to our inability to hire appropriate staff to alleviate his responsibilities.

Our vision is to have a balanced budget, with each segment of our organization operating as efficiently and effectively as possible. As such, this report's Financial Sustainability section should be considered in conjunction with the Culture of Giving section, as congregational giving must begin to supplant endowments and reserves as an ongoing source of funding to cover the shortfall of revenues.

Further, we feel that Beth Shalom, given its place in the Pittsburgh Jewish Community, should consider consolidations, joint ventures, and outsourcing services to make us financially viable into the future.

Attaining financial sustainability over the next five years is both an imperative and an existential challenge.

For us to meet this challenge, we are recommending the following actions:

### To be completed by Fall 2020

- Refinance the mortgage which matures in late 2020 in connection with efforts to finance some of our major capital repairs (e.g., facade). In addition, we will aim to reinstate our line of credit. We will seek proposals from several banks and, in the process, reevaluate our banking relationship.
- Establish/re-establish the accounting oversight review committee, responsible for providing an independent review of the financial condition of the synagogue, to be presented at the May 2020 annual meeting.

### To be completed by Fall 2022

- Complete capital repairs (e.g., facade) financed by bank borrowing.



- Establish multi-year operating and capital budgets, including a fund to cover periodic capital expenses related to building repairs.

To be completed by Fall 2024

- Create a balanced budget that reflects our values by fairly compensating all of our employees and funding initiatives that are key to the synagogue while maintaining accountability and transparency.
- Identify one or more new tenants who will increase the utilization of our building and provide us revenue. This could include a synagogue, another pre-school, a business, or something else entirely.

## 2. Cultivate a Culture of Giving

The 2017 Centennial Campaign represented the start of a new approach of asking members to financially contribute to the synagogue beyond their membership dues. The challenge that faces the synagogue for the next five years is ensuring that this campaign is not an outlier—a one-off event. For the financial stability of the shul, we must reinvigorate the culture of giving at Beth Shalom. The culture of giving needs to be developed so that, irrespective of one's financial circumstances, every member can participate in giving. One hundred percent membership participation in giving should be the goal. Without a successful giving culture and fundraising, the viability of the *shul* is in question.

We need to establish a new development infrastructure that would provide the means for each membership unit to participate in annual giving. We envision a synagogue culture in which the desire to give to Beth Shalom is a high priority for all. Implementing a culture of giving is necessary to achieve financial sustainability.

The recommendations for Cultivating a Culture of Giving are outlined below.

To be completed by Fall 2020

- Hire a Development Director - the first step in developing a giving culture. The director will begin to develop relationships with potential donors as well as provide direction to the lay leadership in developing fundraising skills.
- Establish a Giving Coordinator as a Vice President of the Board. As part of this strategic plan, this position is being contemplated as part of the Board of Trustees reorganization. Fundraising and other giving campaigns can be coordinated through one person or committee and would work in connection with the Development Director.
- Establish a successful legacy giving program with at least 36 participants. This will create an easy route to provide a gift to the synagogue and would also signal a changing culture of giving.

To be completed by Fall 2022

- Develop a new dues structure that is more reflective of members' ability to pay, to result in more dues collected and reduced delinquency.

To be completed by Fall 2024

- Increase participation in the annual giving campaign, established in 2020, to the large majority of members in each year. Solidify a culture where people expect to give to Beth Shalom each year as a matter of course.

### 3. Modernize the Synagogue's Leadership Structure

Beth Shalom's existing lay leadership structure is based upon the synagogue's context twenty to thirty years ago. Conditions at the synagogue and in Pittsburgh have changed significantly in that timeframe. We identified a series of challenges that require a new leadership structure to resolve:

- The current structure leads to unequal division of responsibilities, with an excessive burden placed on the synagogue's President and a small handful of key lay leaders.
- Similarly, we identified significant gaps in leadership and unevenness in the functionality of different Standing or Ad Hoc committees.
- The Board remains too large for effective deliberation and meaningful participation in *shul* work.
- Most of the Board's work happens behind closed doors: for example, many decisions are deliberated only in the Executive Committee, there is no organizational chart showing how lay leadership relate to one another or to staff, and Board minutes are not regularly posted for easy member access.
- There is no clear route of succession for how someone can become involved as a lay leader in the shul, increasingly taking on larger roles as they learn more about the synagogue's functioning. Nor is there an effective way for people to transition out of leadership.

In response, we propose a new leadership structure in which each Board Member oversees a specific area of synagogue operations, and the Board as a whole shares collective responsibility for management and decision making. Relatedly, we propose to revise the structure of the Standing and Ad Hoc Committees with the goal of creating a smaller number of functional, goal-based committees. Additionally, this new structure would clearly define the responsibilities and objectives for all lay leadership roles and provides leaders with the training and tools needed to fulfill their objectives.

To achieve these changes we recommend the following actions:

#### To be completed by Fall 2020

- Develop a Board and Executive Committee structure designed to better share responsibility. Optimize Board size to support a working board model in which each officer takes on a designated area of responsibility and serves as the central point of contact for staff and members. This effort would be led by the current Board and Executive Committee, with the goal of starting implementation by May 2020.
- Write new bylaws conforming to the new Board structure and provide adequate flexibility for changing times. New bylaws should also prepare for changes to the Standing Committee structure to follow.

#### To be completed by Fall 2022

- Establish new protocols for Board transparency. These could include open Board meetings, posting materials online for congregant review, and holding working congregational meetings to meaningfully engage the *shul* community in decision making.
- Assess needs and gaps for all synagogue committees through a moderated workshop including both the Board and professional staff. After this process is complete, restructure the Standing and Ad Hoc Committees to align with the best practices identified during the facilitated discussion and new Board structure.
- Write a guidebook intended to support volunteer leadership across the synagogue. This guidance would define a pathway to experienced leadership, extending from volunteer, to volunteer leader or committee member, to Board Member, to Board Officer. New or revised guidance would also detail job descriptions and expectations and corresponding training materials for Board and committee members.

#### Further actions to consider if time permits

- Define clear processes for volunteers and lay leaders to communicate with professional staff. Provide written guidance to support and reinforce communication norms.
- Set expectations for staff when working with volunteers, reinforcing that staff serve as the face of the organization and that volunteers are giving their time to support the institution. Expectation setting will also empower staff to say “no” when necessary.

## 4. Expand the Profile of Youth and Families in Institutional Planning

Congregation Beth Shalom has a long tradition of exceptional offerings for children of different ages. Lacking, however, has been sufficient institutional oversight and prioritization of the needs of youth and families. Long-standing committee structures have unintentionally marginalized the concerns of this critical—and growing—Beth Shalom cohort. As such, our primary strategic objectives are: 1) to elevate the needs of youth and families among the priorities of the synagogue’s executive leadership and 2) to create a new unified Youth Committee. With these

changes, we hope to improve representation of youth and family in institutional planning and ensure the flow of data and ideas across all program areas relevant to youth.

The Youth Task Force also united readily around the need for expanded programming that would strategically incorporate children and families into the broader programming agenda. As such, we recommend targeted efforts to: catch cohorts falling through gaps in engagement; build new Beth Shalom traditions through replicable, visible programs; and normalize the presence of youth and families at shul in more varied and creative ways. Social justice and intergenerational activities were identified as areas of opportunity.

On Shabbat, current staple and thriving programs such as Shababababa and Manny's service for our youngest children attract both shul regulars and participants from throughout the community. A new parent-led service for K-2 age siblings is a vital expansion of youth *tefilah*. By contrast, there has been little consensus among families regarding the place and role for older children in the building on Shabbat, and teens have been strikingly absent. Recognizing that active efforts in this area are already signaling change, the Task Force emphasized the need for continued attention to these cohorts. Longer term, we also set the goal to deepen connections among family subgroups (Day School, J-JEP, Shabbat/Youth *tefilah*, Youth Group) through staffing to better bridge these disparate programs.

Finally, we envisioned Beth Shalom as a place where children and families belong in the building in the truest sense and may comfortably 'make their mark'. To support this, we recommend revisioning the youth-friendly spaces within the building, starting with short-term and low-cost fixes to signal that youth are welcome in the building.

#### To be completed by Fall 2020

- In sync with goals and timetable for restructuring the by-laws and Board of Trustees (see above, Modernizing Synagogue Leadership), establish representation for youth and families at the executive level. Ensure that the interests of our youth and families are considered as the annual calendar is drafted and are incorporated into all facets of congregational planning.
- Establish a Youth Committee comprising staff serving youth and families (Youth Director; Youth Tefilah advisor; ELC; J-JEP) as well as stakeholder congregants. This group should have a set schedule of meetings throughout the year. This group will be tasked with tracking all families across different cohorts and age groups.
- Establish a "playground" and library of books and developmentally appropriate toys for children outside/inside the sanctuary, and/or a play mat in the ballroom for our youngest congregants. This would signal that they and their parents are welcome in services and in the building. Also consider other actions described in the priority recommendation *Making the Synagogue More Welcoming* (see below).

To be completed by Fall 2022

- First steps towards enhanced programming in the areas of Social Action, learning/studying for youth and adults (e.g. Torah trope on Shabbat); Intergenerational activities; teen programs developed jointly by Youth Advisor and USY Board.
- The community should identify 3-5 new signature Beth Shalom programs that are replicable, cost effective, and have the potential to create expectations and excitement as children grow at Beth Shalom. These will be targeted at cohorts that have fallen through gaps in engagement (transitioning out of ELC, out of Manny's Shabbat service, post-*benei mitzvah*). Recommendations could include: beautification of Beth Shalom, in the form of an annual gift to Beth Shalom from post-*benei mitzvah* students; a family havdalah service; open play space and oneg Shabbat for children and young families.

To be completed by Fall 2024

- Renovation of a designated space for youth, with physical structural change as long-term priority. Aim to reduce "roaming" on Shabbat, provide youth with something to do and/or somewhere to be. Solidify routines and expectations for the growing cohort of children in the building.
- Adapt staffing to further bridge Shabbat morning with general youth and family programming goals. This could include hiring additional trained Jewish educators for Shabbat morning programming.

## 5. Make the Synagogue More Welcoming

Through a combination of an influx of young families to Squirrel Hill, a vibrant clergy, and strong lay leadership, Beth Shalom has been able to grow its membership numbers since 2014, reversing the trend of years past. Nonetheless, the *shul* can be difficult for a prospective member to join and difficult for new members to find a home in.

The membership process itself presents a significant barrier. It is slow and difficult to navigate, as it requires multiple actions from different stakeholders without anyone who coordinates the process.

As well, little thought has been given to Jews who are part of Beth Shalom but are not officially members. These members of the broader community attend services, *Derekh* events, and send their children to youth programs, and are an important part of the Beth Shalom community.

While our building is a great strength for the congregation, allowing us plenty of room to host services and events, its physical structure can present a challenge to members as well. The building can be difficult to navigate for less experienced members.

These barriers mean that new members, prospective members, and members of the broader community find it difficult to become fully engaged experienced members of Beth Shalom. Our

objective is to lower the social and physical barriers to entry and engagement at the synagogue. A distinct challenge of this category is that the lay leaders and staff members who are solving these problems do not have the perspective of less enfranchised members of the community any longer. As such, we will involve less experienced members in designing these solutions whenever possible.

To achieve these changes we recommend the following actions:

#### To be completed by Fall 2020

- Create a fully functional membership committee to take charge of both the bureaucratic and social process of welcoming new members. Figure out how this committee should interface with other relevant committees and staff who are involved in the new membership process. Standardize this process and ensure that prospective members are kept informed about what is happening with their application. After the new member is accepted at Beth Shalom, make sure that they are settling in to the community.

#### To be completed by Fall 2022

- Improve interactions between *shul* leadership and members. Host parlor meetings at the Rabbi's home with specific demographic groups in separate get-togethers. At these meetings, have an agenda to discuss their thoughts, interests, and how to form a better connection to the *shul*.
- Improve the experience of entering the synagogue. Design pleasant experiences for the entrance to the synagogue, redesigning the physical layout as necessary. Manage the transition past security to minimize anxiety and maximize safety. Use outdoor space as a way to transition people inside.
- Improve signage in building, both to help members locate events and to make them feel welcome.

#### To be completed by Fall 2024

- Improve the comfort and welcome of the physical space of the synagogue. Create lounge space with soft, comfortable furniture. Get more comfortable chairs in ritual spaces. Have quiet Jewish music playing in the building. This should happen in concert with changes to the building that make youth of all ages more comfortable as well.
- Connect less-connected members with highly engaged members. Assign mentors for less-connected members. Train the mentors and have a program for them to follow so they can mentor effectively. Host a new member dinner at someone's home. A highly engaged member personally invites each less-connected member to an event once per year.

### Further actions to consider if time permits

- Someone from *shul* leadership contacts each family unit for purposes not related to donations or dues each year. This could take the form of a meeting, a lunch, a phone call, or attending an event together.
- Make the synagogue a “third space” where people can congregate for activities they are already participating in, outside of home and work. This might include having a co-working / co-writing space available during the day. Have a cafe in the building, perhaps just on Sunday mornings or perhaps all the time. Create “open lounge” time for different groups at different times, e.g., host teens as an overflow space from the JCC.

## 6. Improve Member Engagement

Beth Shalom has a core engaged membership who help make it into a growing and successful community. In the last five years, the synagogue has been successful in bringing some younger members into leadership positions, and has seen the remarkable growth of its *Derekh* initiative which engages hundreds of people every year.

That said, there are many opportunities for further improvement. Communication with members, especially less deeply engaged members, is largely in the form of a weekly email. This is easy to ignore, as much of its content may not be relevant to the recipient. This is typically the only way that members are engaged by the congregation. In interviews, several members expressed that they would like to volunteer with the synagogue, but had never been asked and did not know how to get involved.

Engagement must be considered from both passive and active approaches. Passive engagement is when the participant is in the audience and includes such things as attending services or going to a lecture. Active engagement is when the participant is taking action and includes such things as bringing a meal to the sick, leading a class, or organizing an event.

Our vision is of a highly engaged synagogue membership. Core members will continue to be engaged and serve in leadership roles as they do now, but less deeply engaged members will also engage with the synagogue and their fellow members on a regular basis. This plan will be judged successful if every member of the synagogue engages with a fellow member outside the building, comes to a synagogue event, or participates in an act of *hesed* associated with the synagogue at least once a year.

We recommend an overhaul of the institutional infrastructure to improve our member engagement. This touches on internal tools such as databases and communication tools. As well, it strengthens the membership committee, which we see as the driver of these changes in the next five years.

To achieve these changes we recommend the following actions:

To be completed by Fall 2020

- Improve access to member engagement-related information with up-to-date contact relationship management (CRM) software. Such a database will include searchable and sortable member and prospective member lists, information about upcoming lifecycle and other transition events, and information about what skills members have and how they can contribute in non-monetary ways.

To be completed by Fall 2022

- Communicate more effectively with members about our existing opportunities for engagement. Improve the accuracy and consistency of event messaging across multiple communication channels (e.g. website, email, paper). Special attention should be given to volunteering and *hesed* opportunities, which are currently not communicated effectively.
- Develop a new “volunteer matchmaker” position for a single lay leader or new volunteer coordination committee or *hesed* committee. This job would entail connecting volunteer leaders with current or potential volunteers, building on the strong and diverse relationship networks present across the synagogue. Among other responsibilities, this position would be responsible for asking each member to volunteer for the community once per year to complement the High Holy Days monetary appeals, and following up on these commitments.
- Increase targeted communications to membership, to help members identify events of interest and to help like-minded members find one another.

To be completed by Fall 2024

- Provide more opportunities for casual communication between members outside official channels. Existing casual communication happens most frequently in the building, and it should be extended to external venues, both online and offline. This might include Shabbat dinners in people’s homes, online channels like Facebook or Slack, or meetups at the JCC or Starbucks.
- Engage people when they are in the building for other reasons. Engage parents at ELC dropoff and pickup. Use transition times before/after other events to communicate and recruit.

Further actions to consider if time permits

- Use requests for help to increase belongingness. Ask people to help make a *minyan*. Ask people to help another member, not the institution. Coordinate requests for money to avoid the sense of being perpetually dunned (or just wanted for your money, not for yourself). Invite people to volunteer in groups so that they can form peer connections while volunteering.



- Engage members through music. Distribute sheet music, guitar tabs, and/or playlists of music to listen to at home. Establish and share a core set of melodies that expands over time. Develop musical familiarity for members and guests with this canonical set of tunes. Share and teach people's family melodies.
- Consider providing additional in-person training session (volunteer orientation) and/or a regular volunteer open house or "volunteer fair." This would provide information to new or newly engaged members about volunteering opportunities and resources.

## Implementation Plan

**This strategic plan is only as good as our community's good faith efforts to implement its recommendations.** While the financial sustainability action items address existential threats to our synagogue, all the action items reflect our community's best ideas for how Beth Shalom can overcome its current challenges and thrive in its current identity. To sustain and build Beth Shalom into our next century, we need to maintain our focus in the next five years on enacting this plan.

The plan identifies a series of actions and investments that will require significant time and resources and careful coordination to successfully implement over the next five years. In order to support sustained implementation over time and assure both accountability and transparency, in this final section we outline the following:

- The formation of a Strategic Plan Implementation Team
- The process for plan dissemination
- An approach to track and report progress on the plan
- The role of the Board of Trustees, Executive Committee, and other key committees critical to plan success.

In addition, the writing team has mapped the actions described in the previous section into a table that provides additional implementation detail and serves as an easy reference for relevant staff, lay leaders, and committees responsible for action implementation. The table includes further detail on target dates for implementation, action leads and responsible parties, estimated cost or level of effort, related actions or those that serve as prerequisites for a given action, and suggested outcome metric or target (if known). This table can be found as a [filterable and searchable spreadsheet](#) (also see Appendix IV).

## Strategic Plan Implementation Team

USCJ recommends that Beth Shalom establish an implementation team to support plan implementation through the proceeding 5 years. The team will play a critical role, ensuring that actions are implemented as planned and providing transparency and accountability throughout this period. Specifically, they will be responsible for guiding key actions; tracking progress; reporting to the clergy, Board, and congregation; motivating continued progress; and celebrating key milestones and successes along the way.

Of course, this team will remain advisory to the Board: it has no direct authority, but instead is intended to ensure that the plan remains at the forefront of synagogue decision making and that key tenets are maintained, understood, and communicated through lay leadership and staff turnover during the implementation period. In addition, the team can help different parts of the *shul* integrate their efforts to ensure broader systemic goals are being met.

The implementation team will be considered an ad hoc committee and nominated by the current President. We recommend the following makeup:

- Current Executive Vice President
- Executive Director
- 1-2 members of the Strategic Plan development team (writing team members or Task Force chairs)
- At least one additional officer on the Executive Committee
- One Past President
- One additional Board Member representing Beth Shalom's young adult cohort.

In total, we envision a team of 5-6 members serving as advisors to the Executive Committee, Board, and other key committees. We recommend that the team maximize its use of electronic communication and/or videoconference meetings to minimize any additional time burden.

## Sharing the Plan

Once enacted, we recommend that the plan be shared with the entire Beth Shalom community to get their buy in for the direction and priorities detailed in this plan and to generate excitement for completing the action items in the plan. Publicity of the plan will ultimately be the responsibility of the Implementation Team, under the direction of the Executive Committee and Board of Trustees. We suggest that an overview of the plan, such as is contained in the Executive Summary, be shared with the synagogue through paper and electronic mailing, or through the *shul's* quarterly publication. As well, we suggest that in-person channels be used to inform the congregation about the plan, such as a prominent mention during Shabbat services and an informal question and answer session. External parties can also be an important component of communicating to the membership; the Jewish Chronicle may be interested in publishing an article about our strategic planning process, for example. Members should be empowered to request a full copy of the plan from office staff, and an electronic version of the plan should be made available on the *shul's* website.

## Key Actors in Ensuring Plan Implementation

Beyond the implementation team and actors previously identified, the priority recommendations and actions identified in this plan rely especially on successful coordination and collaboration with the following individuals and committees:

- President and Executive Committee
- Finance Committee

- House Committee
- Membership Committee
- Youth Committee (when established)
- Bylaws Committee

The [detailed implementation table](#) highlights the individuals and committees responsible for each action identified, including who should serve as lead for each action. After plan adoption, we recommend that a member of the implementation team provide a brief overview of the strategic plan for each of these key committees at its next meeting, highlighting how that committee's efforts align with plan goals and recommendations and noting specific actions that the committee will be asked to implement or lead.

## Tracking and Reporting Progress

A primary function of the implementation team will be to track and report on progress towards strategic plan goals. This should include regular communication with the actors noted above, a system for tracking progress, and regular report-outs to the Board to ensure accountability and transparency. Specifically, we recommend that the team—in partnership with staff as deemed appropriate—takes the following steps to track and report progress over time:

- Create a tracking spreadsheet, patterned on the implementation table, that the team updates on a regular basis (at least monthly).
- Proactively reach out to key committee chairs in advance of action milestones to check on progress and determine if changes or additional resources might be required.
- Develop a visually appealing tracking chart, posted in a highly visible location (e.g., outside of the synagogue office), that highlights progress on priority recommendations for all synagogue staff, members, and visitors.
- Provide a strategic plan implementation update to the Board of Trustees on a regular basis (i.e., every other month).

The President can also provide regular updates during weekly Shabbat announcements, and should highlight progress made approximately every 6 months at the Congregational Meeting and during remarks made on Yom Kippur, respectively.

Because it is also important to celebrate successes (with food and company), we also recommend coinciding a *shul* event with the 1-, 3-, and 5-year implementation milestones, recognizing the hard work of all volunteers and staff who have helped to translate this plan's vision into reality.

## Quick Wins

We note that several key actions identified in this plan are already underway or could be completed soon after plan adoption. We highlight one such action from each recommendation below to help implementation get off to a fast start:

- 1a: Complete a refinance of the mortgage which matures in late 2020 in connection with efforts to finance some of our major capital repairs.
- 2a: Hire a Director of Development.
- 3a: Develop a Board and Executive Committee structure designed to better share responsibility and align with current best practices.
- 4a: Establish representation for youth and families at the executive level.
- 5a: Create a fully functional membership committee.

# Appendices

The appendices of this plan are offered as electronic links. If you are holding a paper copy of this plan go to <http://bethshalompgh.org/sp2019/> to reach the electronic version so that you may view the appendices.

## Appendix I - Fact Book Materials

- [Pittsburgh Jewish Community Assessment Results](#)
- [Beth Shalom Fact Book](#)
- [Congregational Survey](#)
- [Congregational Survey Results](#)
- [Beth Shalom Emerging Themes](#)
- [Emerging Themes Committee Debrief](#)

## Appendix II - Full Task Force Reports

- [Financial Sustainability](#)
- [Leadership and Volunteering](#)
- [Youth](#)
- [Membership](#)

## Appendix III - Grouping Work Session

- [Engagement Grouping](#)
- [Financial Sustainability Grouping](#)
- [Leadership Grouping](#)
- [Physical Structure Grouping](#)

## Appendix IV - Detailed Implementation Table

- [Implementation Plan Spreadsheet](#)

## Appendix V - Proposed Mission and Vision

- [Proposed Mission and Vision Language](#)