

Congregation Beth Shalom 2019 Strategic Plan: Membership Engagement Task Force Report

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Task Force Members

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Process Overview

We formed the Membership Engagement Task Force and met five times between February and the end of May. Community member engagement means that we seek to support participation in synagogue activities, as well as a sense of commitment to the synagogue community.

We understand “community member” broadly, meaning all people who want to engage with our synagogue regardless of whether they pay dues. Discussing financial and membership models is out of scope for this committee (the Financial Sustainability task force is tackling that job). Our task force’s job is to be inclusive in our definition of who we serve.

Our in person meetings were structured as follows:

1. Introduction and visioning
2. Sorting and categorizing data, interviews, and feedback into themes by affinity diagramming
3. Prioritization and translation of themes into objectives
4. Prioritizing objectives
5. Sensemaking of objectives and creating language to describe them

Key inputs to our Task Force included inputs from earlier strategic plan meetings with the Board of Trustees, the congregational survey, and conversations with members, Trustees, and staff. Each Task Force member also provided individual input via surveys and was tasked with interviews between meetings.

Our first meeting primarily focused on bringing everyone to speed by reviewing materials and setting definitions. We used affinity diagramming in our second meeting to develop categories of emergent themes. [The affinity diagram can be found here.](#)

Following this process, during our third meeting, the themes were translated into objectives. We used this process to focus our energies on measurable tasks for the strategic planning process as a whole. [This can be found here.](#)

The objectives were then collectively ranked for importance. We did this by laying out the objectives and individually ranking them. This overlapping process [can be found here.](#)

In the last two meetings, we focused on prioritizing and creating language. The result of this work is below.

Vision for Membership Engagement

We envision a Jewish communal environment that is spiritually nourishing, personally connective, and encourages those near and far from its core to seek greater engagement. All who come are welcomed with open arms and hearts, and synagogue offerings, organized by Derekh or other arms, are designed to reflect today's individual and communal needs to keep new and veteran members of all types, skills, and backgrounds engaged. Members learn, pray, and live a life infused with Jewish values, enhanced by synagogue offerings and communal framework, and understand the value that Beth Shalom adds to their lives.

Strategic Objectives and Proposed Actions

Strategic Objective 1: Develop institutional infrastructure to improve our member engagement.

Strategy 1.1: Create a fully functional membership committee with explicit mission, vision, and values.

- Find leader and members for committee.
- Figure out process for how committee interfaces with other relevant committees (e.g. Volunteering, Youth) without creating undue administrative burden.
- Identify whether Chesed falls into this committee's remit, or whether a separate committee is needed.

Strategy 1.2: Improve access to member engagement-related information.

- Searchable and sortable member lists. (Sample searches: single, empty nest, recently bereaved, new member, last date of contact by leadership, etc.)
- Information about upcoming lifecycle and other transition events, including people who may soon become members.
- Information about what skills people have and how they can contribute in *non-monetary* ways to the synagogue.

Strategy 1.3: Make committee participation (and leadership!) more productive and fun.

- Train committee leaders and members in effective meeting practices.
- Have a process for removing committee members who are unkind or non-contributory.

Our recommendation for action:

Action	Capacity	Timeframe
What?	Who? How much? How complex?	When?
Identify leader for membership committee. This person can take the lead on recruiting members and collaborating with other committees.	Current synagogue leadership identifies the right candidate(s) and recruits them for the position.	As soon as possible

Action	Capacity	Timeframe
What?	Who? How much? How complex?	When?
Conduct data inventory on member-related data. Create document for membership committee's reference.	Staff.	By the time committee is formed.

Strategic Objective 2: Communicate more effectively with members about our existing opportunities for engagement.

Strategy 2.1: Improve the correctness and consistency of event messaging across multiple communication channels (e.g. website, email, paper).

- Special attention should be given to volunteering and chesed opportunities, which are currently not communicated effectively.

Strategy 2.2: Improve signage in building, both to help members locate events and to make them feel welcome.

Strategy 2.3: Increase targeted communications to membership, to help members identify events of interest and to help like-minded members find one another.

Strategy 2.4: Provide more opportunities for casual communication between members outside official channels.

Our recommendations for action:

Action	Capacity	Timeframe
What?	Who? How much? How complex?	When?
Conduct 3-4 “guest walkthroughs” of the building with think-aloud, to identify points of confusion. Create signage in response to their pain points.	One observant volunteer can conduct the walkthroughs in 2-3 hours. Staff to create temporary paper signs for evaluation.	Short term; low-hanging fruit

Action	Capacity	Timeframe
What?	Who? How much? How complex?	When?
Understand how current members are casually contacting one another and amplify their successes. This will likely result in both channels for casual communication and opportunities to better target communication.	Membership committee conducts brief (<10 minute) phone interviews with different demographics, analyzes data.	Medium term

Strategic Objective 3: Make the synagogue space physically welcoming.

Strategy 3.1: 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 security.
- Use outdoor space as a way to transition people inside.

Strategy 3.2: Improve the physical comfort of the building.

- Create lounge space(s).
- Have soft, comfortable furniture.
- Get more comfortable chairs in ritual spaces.
- Have quiet Jewish music playing in the building.

Strategy 3.3: 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.

Strategy 3.4: Make the synagogue a “third space” where people can congregate for activities they are already participating in, outside of home and work.

- Have a co-working / co-writing space available during the day.
- Host Your Book Club (etc.) at CBS.
- Have a process for who can add events to the calendar, reserve space, and for what purpose; increase member access to room booking.
- Have mentors host their meetings at CBS.

Strategy 3.5: Host drop-in / drop-out activities in addition to scheduled events.

- 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.

- Host a board / card / bridge / mahjongg / game night.
- Host a community service project that people can help with anytime they drop by.

Our recommendations for action:

Action	Capacity	Timeframe
What?	Who? How much? How complex?	When?
Adapt “guest walkthroughs” above to understand the perception of entry space, including the transition past security.	One observant volunteer can conduct the walkthroughs in 2-3 hours. Identify a member with relevant expertise (e.g. interior design, experience design) to evaluate findings.	Short term; piggyback on signage

Strategic Objective 4: Make the synagogue socially welcoming.

Strategy 4.1: Connect people with leadership.

- 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.
- Someone from shul leadership invites each new member to an event, and goes with them.
- Someone from shul leadership contacts each family unit *on matters 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.
- Create “get to know you” materials for leadership, e.g. video on website.

Strategy 4.2: 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.

Strategy 4.3: Connect people with peers who share experiences.

- Host events for specific demographics (e.g. young families) so that people can meet each other. Structure the event for peer contact.
- Create *havurot* of 6-8 families.
- Create a peer-led new member program.

Strategy 4.4: Increase opportunities for casual contact between members.

- Greeters encourage people to sit together during services.
- Help people follow up after Shabbat encounters.
- Help people find each other for fun outings unrelated to the synagogue.
- Allow people to explicitly identify themselves as a greeter or someone who wants greeting, instead of relying on facial recognition and memory.
- Encourage hanging out and/or discussion after events.

Strategy 4.5: 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.

Strategy 4.6: Connect with members at times of transition (e.g. joining the synagogue, lifecycle events).

- Create new member integration track (e.g. 101 class, picnic, onboarding, peer mentoring, etc.).
- Create transition kits for each lifecycle event including prayers, practice, traditions, timelines, checklists, etc.
- Use post-transition times as an opportunity for Jewish connection / re-connection, as people reconfigure their lives.
- Better communicate to membership about upcoming lifecycle events.
- Lifecycle peer mentoring program, e.g. connect families who are pre-baby with folks who have young children and can advise.
- Chesed related to lifecycle events, e.g. offering to help prep with a bar/bat mitzvah, meals for new parents, etc.

Strategy 4.7: Musical engagement.

- 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.
- Music handouts.
- Music classes.
- More concerts! Including cabaret and cafe style events.

Strategic Objective 5: Extend participation beyond the synagogue walls.

Strategy 5.1: Create home-based ritual packages.

- Shema / Modeh Ani sheets.
- Shabbat / holiday in a box.
- Offer Shabbat and holiday takeout.
- Guidebooks to specific rituals and/or lifecycle events.
- Playlists that match service melodies.

Strategy 5.2: Share Shabbat and holiday meals at home.

- Meal match program. (Shabbat@Home or partner with OneTable.)
- Personal invitations to meals.
- Better understand barriers to inviting guests.

Strategy 5.3: Torah study at home.

- Train facilitators to lead groups.
- Have source sheets printed or digitally available.
- Collaborate with Project Zug for online *chavruta*.

Strategy 5.4: Create positive social norms around home ritual and Torah study.

- Share images of people's home-based ritual.
- Share members' customs and ritual traditions.

- Host Shabbat and holiday preparation events in people's homes, such as mishloach manot assembly.

Strategy 5.5: Give people a sense of the impact Torah can have on the world.

- Participate in external volunteer events together, e.g. walking teams.
- Create volunteer groups with specific aims that are easy to find and the leaders easy to get in touch with.
- Surface the volunteer / community engagement we are already doing.