



## Strategic Plan for Congregation Etz Hayim

November 2016

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## Timeline/History

In 2013 our congregation began investigating and considering the need for a new strategic plan. In February 2014, our congregation embarked on a strategic planning process. We had applied through USCJ, and CEH was one of only ten synagogues chosen throughout the country, for their strategic planning program, *Sulam*. John Howard did the research and submitted the successful application. In May of 2014, Naomi Halpern and Rabbi Bass went to the first session in New York.

After that, the committee began meeting. We developed a “fact book” that contains our committee interviews, a SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis, and compiled the results from our Congregational Survey. Contents of the “fact book” are included as appendices at the end of this document and are provided as a record of the strategic planning committee and the CEH Board’s efforts and process followed.

We communicated about our work with the whole congregation through a sermon during the Yamim Norayim (High Holy Days), in our 2014 Fall Membership meeting, and through articles in the Chronicle.

In November of 2014, Scott Burka and Rabbi Bass attended the second training session in NY. Following that, we created our Vision Statements and formed the Strategic Planning Task Forces. The Strategic Planning Task Forces focused on the six issues of Kehilah Kedoshah (community), Tefilah (Ritual), Limud (learning), Hessed VeTikun Olam (social action), Kayamut (sustainability and development), and Hanhagah (leadership). In January of 2015, the Task forces started the process of identifying and prioritizing the tasks to be implemented by our Strategic Plan. We dreamed about different possibilities. In May of 2015, we had a Priority Setting workshop, where we picked two tasks from the many suggested by each of the task forces that we would like to implement. During the summer and fall of 2015, each task force worked to clarify the implementation steps that would allow these tasks to be achieved. In November of 2015, the Board of Directors approved the draft strategic plan. The final Strategic Plan will be published in the fall of 2016.

# Congregation Etz Hayim Vision

## ***Vision in Bullets***

### *Kehilah Kedoshah (Community)*

We reinforce our solidarity by celebrating the rich traditions of our heritage and adapting them to recognize the inclusiveness of our community.

### *Tefilah (Ritual)*

We encourage and invite the participation of all people in service leadership. There is a palpable, wonderful energy and an intoxicating feeling of joy as our whole congregation participates in service leadership. Communal participation fills our sacred space with transcendent energy and shared joy.

### *Limud (Learning)*

We experience life through a Jewish lens based on our study and practice of Torah. Congregational learning is a vehicle through which we can broaden our understanding and experience of Judaism.

### *Hessed veTikun Olam (Social Action)*

We care for each other and for the world around us.

### *Kayamut (Sustainability)*

We make a personal commitment of resources to our congregation as we journey on a path to holiness.

### *Hanhagah (Leadership)*

We cultivate a new generation of leaders to sustain our future.

## ***Prose Vision***

Etz Hayim is a wonderful, sacred community, a Kehilah Kedoshah. We are a warm, inclusive congregation that reveres and embraces the rich heritage of our Jewish traditions and teachings. As a modern, egalitarian community living in America, we encourage diversity and freedom of expression, recognizing that each of us chooses our own path in Judaism. We seek to integrate our Jewish identity and observances in our daily lives, and we engage in Torah study and self-reflection to harmonize our behaviors and our beliefs.

We call the Torah, the Hebrew Bible, Etz Hayim. It is a powerful metaphor, for we stand proud, roots firmly planted in the ground, with our solid foundation in Jewish traditional texts and law.

However, just like a tree, the leaves change with the season. We grow in our learning and our understanding of texts. We are exploring more interpretations, creating new activities - always changing, always moving. We are truly a Tree of Life.

Congregational learning is the vehicle through which we broaden our understanding and experience of Judaism. It is the bridge that connects the insights learned from the rich traditions of our people, in order to face the challenges of the society we live in.

We believe in communal participation, both in our sacred community and outside. Communal participation fills our sacred space with transcendent energy and shared joy. Our community participates actively during services, as well as being involved with the community at large. Etz Hayim is truly present in the community. We are involved in social action, and also in caring for each other, in learning, and in worship. Combining study and action, and tailoring our efforts to appeal to different backgrounds, ages, and identities, our community continually strives to foster engagement in life-long learning. By drawing on the vast and varied experiences of our members, we seek to learn from one another, maintain the continuity of our honored customs, and cultivate a new generation of leaders to sustain our future.

Welcome home to Congregation Etz Hayim. *You* belong here.

### ***One-line Vision***

Congregation Etz Hayim is a welcoming spiritual home for our community, fostering unity and connection as we journey together on a path toward holiness.

# Task Force Results

## Kehilah Kedoshah (Community)

### *Guiding Principles*

We are proud to celebrate the rich traditions of our Jewish heritage and adapt them to recognize the inclusiveness of our community.

### *Strategies*

With a balance of outreach to a wide variety of populations and “inreach” to our cherished membership, we will achieve smart growth - staying the “right” size for our congregation while tapping underserved populations of all ages and increasing awareness in the community of Etz Hayim and our programs.

It is our goal to engage in meaningful ways with each and every member, recognize each individual for their strengths and contributions to Etz Hayim, and to demonstrate that each member is a cherished part of the community. Arlingtonians who made their homes here don’t need to leave Arlington to get to their Jewish home away from home.

### *Tasks-Tier One*

The following tasks will allow Etz Hayim to increase and enhance all internal and external communications, thus increasing awareness of Etz Hayim in the Rosslyn-Ballston corridor and beyond.

- Create a Membership Guide, which would include a Membership Directory as well as a visual guide to members, clergy, and staff, lists of committees and their email addresses. The Membership Task Force recommends working with the Office Manager and volunteer lay-leaders to organize and revamp the current membership directory.
  - Collect updated information from each member, including titles (Dr., Mr. Ms., etc.) and request a photo of each family member. We strongly recommend adhering to firm deadlines for data collection. If changes/additional data are given to the office, the database should be easily edited and accessed online by members.
  - Photograph each member of clergy and staff so that all photographs possess a similar aesthetic and appear professional.
  - Compile list of all CEH committees, committee chairs, and contact information for each. @etzheim.net email addresses could be created for each committee.

- As a companion to the directory, each member will receive a Membership Guide in PDF format (and print upon request for those without access to a printer) containing all of the information members need. It can be managed online and digital copies can be downloaded by members or available in PDF upon request. The Membership Guide content doubles as copy that will populate the CEH website.
- An initial compilation of the Membership Guide is available at [https://docs.google.com/document/d/1-9mxG7h0904U0D2IKojq\\_P3AAqBymp8U6UV1xYuNLbU/edit](https://docs.google.com/document/d/1-9mxG7h0904U0D2IKojq_P3AAqBymp8U6UV1xYuNLbU/edit).
- Under the auspices of creating this guide, we recommend taking inventory of communications vehicles, beginning with Weekly Emails (congregation, religious school, preschool, etc.), Chronicle, Announcements/Programs, website, etc. and determine which to keep and how to improve them. All communications materials will keep the same logo, but will be rebranded to establish a similar, cohesive look.
- The Task Force recommends creating a Communications Guide for event owners/committees. Each committee/individual planning a CEH event will designate an event owner who will be the main contact for that event. The event owner will receive a communications guide that will take them through event planning step-by-step, including instructions on how to promote the event and contact info for publications/journalists. This information will be housed online and easily updated/accessed.
- The Task Force recommends creating a new calendar system (perhaps integrated with new website host) that can be easily edited, integrated into the website, color-coded/sorted for different event types, offers easy viewing on mobile devices, and prints well on paper.
- Establish corps of ambassadors (Chessed Brigade? Mensch Corps?) to ensure visitors new and old feel welcomed and embraced by our congregation.
- The Task Force recommends establishing a new member welcome basket and protocol for “onboarding” families new to Etz Hayim.
  - The Membership VP reaches out first by phone and then email to welcome each new family to the congregation. The new members will have an opportunity to voice their interests and ideas so that we are able to integrate them into committees, services, and other activities relevant to them.
  - An existing member of the congregation will deliver the welcome basket to the new member(s). The welcome basket will include a USB drive with the Membership Guide and Directory, a Havdalah set, and items for their children, if they have any.
  - A Religious Committee member will invite each new member to join the congregation on a Saturday morning and then at Torah services. Jewish members will be invited to have an aliyah, read torah, open the ark, etc. Non-Jewish family members will be offered the opportunity to read a passage in English.
- The Task Force recommends establishing Havdalah cohorts. Based primarily on geography and family type (seniors, families with children of the same ages, etc.)

## *Tasks-Tier Two*

- Inreach
  - Establish listservs for Religious School, Preschool and/or other groups within the congregation.
  - Hold regular Shabbat dinners and neighborhood-based progressive dinners.
- Outreach
  - Plan musical Shabbat event(s) at Lubber Run Park.
  - Establish list of neighborhood representatives who will post items on Arlington/Alexandria listservs to which they belong.
  - Offer programming outside of the Etz Hayim building, such as adult education or Torah study classes in apartment party rooms, social events at the Whole Foods Arlington Café, etc.
  - Create a mentoring program, pairing veteran and new members.

## Tefilah (Ritual)

### *Task 1 – Buddy System*

Current Status: We don't have a buddy system

Here's where we want to be in the future: We will have a "buddy system". We will have mechanisms for ensuring the system remains functional and effective. Evaluations will show that the buddy system has made people's Jewish lives stronger and their connection to the shul stronger.

What are the goals of the Buddy System?

- Primary goal is to strengthen people's Jewish lives
- Secondly will strengthen school, leadership, membership

What will buddies do? Buddies will invite newer members to services, Shabbat dinner, holidays, etc. Buddies would help newer members learn about and navigate the various opportunities that exist for growth highlighting the activities/programs that seem to be well suited for the newer members. All new members will be assigned buddies when they join. Buddies will need to apply to be buddies and will need to make a commitment for a year to invite their assigned buddies to events/services/Shabbat dinners/etc. Buddies will also have a responsibility to report back to the coordinator(s) if the relationship isn't going well or doesn't seem like a good match.

How do we get from where we are to having a fully functional Buddy System:

- Coordinator(s) will be selected– need someone good at the matchmaking skills as well as follow-through capability. Probably needs to be at least 2 people. Tefilah task force nominates Mike Jacobs and Sue Hamm as coordinators; they have accepted this responsibility.
- Spread the word throughout summer and early fall: Coordinator(s) will lead the marketing for this program through the fall. Marketing will include announcements at RH and YK as well as Shabbat Services, an informational paragraph on website ("about us" section), "This week at Etz Hayim" and Chronicle. Members of the shul will be tapped to be buddies; they will need to fill out an application and make a commitment for a year. New members of the shul will be automatically assigned buddies.
- Coordinators collect names and make matches – late September early October. First year goal is 10 sets of buddies.
- Coordinators check in with buddies periodically (maybe once every 8 weeks)

- Evaluations at 6 months and at 12 months – presentation by Coordinators to Strategic Planning Committee or CEH Board. Evaluation questions to be developed ahead of time. What is success? “Growing Jewishly.”
- Minimal costs; maybe a group dessert type thing after 6-12 months.

Options to consider after first evaluation:

- Buddies not just dual but triple or more
- Buddy pairings last for only 1-2 months, then move on

### *Task 2 – Encouraging leadership of services*

Current status: Have lay leadership opportunities – on an informal basis. Not widely known, not broadly used.

Here’s where we want to be in the future: Make the opportunities more widely known, especially “beginner-level” opportunities, with a well-understood process to get from where they are to being up on the bimah and taking advantage of the opportunities.

How we get from where we are to more lay leadership of services:

- Select coordinator(s)– need approachable people – Tefilah task force nominates Sharon Beth Kristal, Naomi Halpern and Ben Simon.
- Coordinators work with the rabbi to come up with catalog of things that can be done, including “beginner level” opportunities.
- Coordinator goes on a campaign to advertise (again, work with rabbi).
- Coordinator works with congregation members to determine desires.
- Is there a cost? Possibly, if we need classes and need a teacher (outside of our own rabbi) to handle the classes. Might need to buy CDs or software.
- What is success? Having more people participate in lay leadership of services by 12 months.

## **Limud (Learning)**

### *Guiding Principles*

We experience life through a Jewish lens based on our study and practice of Torah. Congregational learning is a vehicle through which we can broaden our understanding and experience of Judaism, throughout our lifetime. It is the bridge that connects the insights learned from the rich traditions of our people, to facing the challenges of the society in which we live.

Etz Hayim's goal for congregational learning is to have a process through which all the members of our community feel the infusion of Judaism in our daily lives and are inspired to continue to enrich our connection to Judaism and the world by the study and practice of Torah. Living in a religiously diverse, and often secular, American society provides an incredible opportunity to recognize common themes and values in our shared human experience. However, many of us often forget or take for granted how much of our humanity is shaped by, or is in harmony with, fundamentally Jewish values. Further, because we have "outside" lives, we may tend to think of Judaism as constrained to a specific location or a unique set of practices that is separate from our daily experiences.

While our liturgy and rituals provide a common grounding for our community, our congregation has a rich diversity in Jewish experience, knowledge, and outlook. Ancient lineages carrying the wisdom of the sages co-mingle in our synagogue with the fresh eyes of the young, the modern, and those new to Judaism. Our purpose is to practice a congregational learning that helps us continually experience the vitality of our Jewish heritage and traditions and express our values in support of tikkun olam in our own and the wider community.

### *Strategies*

To achieve our vision for congregational learning, we propose pursuing two intertwined strategies that foster the development of our Jewish identity and its expression in our greater community. Our first strategy is to build up our communal Jewish identity through shared learning experiences. Our second strategy is to recognize how our Jewish identities are, and can be, integrated with our daily life through our involvement in issues of wider community concern.

### Strategy #1:

- Build up our communal Jewish identity through shared learning experiences.
- Encourage parents to grow with their children by raising expectations for active engagement in religious school, services, and participation in adult education programs that complement student curricula.
- Establish havurot to pursue common Jewish interests and build community bonds.
- Incorporate into all learning opportunities, illustrations of how Jewish values, traditions, and beliefs are not separate from our daily life experiences but are integral to them.

### Strategy #2:

- Extend our community's involvement in issues of wider community concern.
- Strengthen our practice of tikkun olam as individuals, within our pre- and religious school, and as a community.
- Strengthen our synagogue's partnerships with other local and regional Jewish organizations, through more joint programming for youth, families, and adults.
- Engage in constructive discussion of American and Jewish values regarding topics of contemporary concern.

### *Tasks*

#### Narrative

CEH's opportunities for learning primarily rely on separate tracks for the religious education for our youth and for our programs in adult education. While each of these program areas has unique functions that serve these independent audiences, there are significantly more opportunities for learning to be shared at the congregational level. Most frequently the nexus of the adult and student worlds is during services and holiday celebrations. For example, CEH has a practice of asking its students to lead certain prayers during services, and CEH periodically hosts grade level specific pot luck dinners after services. Religious holidays often have components that appeal to adults as well as youth, and specific services have been directed toward toddlers and early grade levels. However, for the most part, adult learning experiences are generally segregated from the learning experiences of our students. This separation of programming hinders the integration of our children into the whole of synagogue life and deprives our adults the curiosity and vitality that children can bring to our experience of Judaism. To advance our vision of experiencing life through a Jewish lens, the selected tasks aim to enhance parental involvement in CEH's learning framework as well as expand CEH's partnership with other faith organizations in the region to take advantage of their learning programs and to enhance our understanding of different perspectives.

Implementing these tasks will:

- help adults serve as better role models for children to live a Jewish life and facilitate Jewish engagement between parents and children to enhance family relationships as well as improve children's learning
- foster development of a more robust adult learning program that can connect to our religious school curricula and enhance our understanding of the diversity of religious views and traditions in our region

The impacts of the implementation of these tasks can be measured by the changes in adult participation in services and education offerings, by changes in child participation in weekly services, and by changes in adult and child prayer fluency, and knowledge of Jewish themed topics.

Task 1: Encourage parents to grow with their children by raising expectations for active engagement in religious school, services, and participation in adult education programs that complement student curricula.

- Establish religious school expectations for parent/child attendance at Shabbat services as well as Sunday minyan. Re institute a point system for service attendance with additional points provided for parental participation by encouraging grade level specific parent groups or combined parent/child groups to lead certain prayers at services.
- Add grade-level oriented Saturday services (can be in the form of Junior Congregation and Tot Shabbat) with students and parents prepared in advance to lead prayers. Provide a grade-level appropriate discussion/activity for the Kiddush lunch. Develop a standard list of prayers to be led by students and parents which can be assigned.
- Encourage direct parental participation in student education by establishing a set time after each Sunday minyan for grade-specific parent learning. Meet with the parents of a specific grade on a rotating basis with a different grade meeting each week. This time should be used to:
  - Review class progress and what is currently being learned in the class
  - Review the same prayers (including rituals and discussion of meaning) as the students in order to encourage parental service leadership/participation (especially at the grade-level Friday night and Saturday morning services)
  - Provide conversation starters to parents to engage with students on topics covered in religious school

Task 2: Strengthen our synagogue's partnerships with other local and regional Jewish organizations, through more joint programming for youth, families, and adults.

- Develop an adult/teen D'var Torah learning program that encourages congregant presentations at services.
- Establish a regional interfaith Hebrew bible study group to provide opportunities for sharing of different religious perspectives presentations at select Friday and Saturday morning services.
- Partner with other religious institutions to share in their learning programs and obtain a variety of speakers to discuss ancient and modern Jewish history and Jewish holidays, to demystify Talmud and Mishnah, to address the application of Jewish values to modern issues, and to offer tikkun olam opportunities.
- Aggressively promote community-wide events, e.g., Good Deeds Day, Holocaust Remembrance and Israel Independence Day activities as well as regional youth events. Attempt to not schedule synagogue events over community events and arrange to attend these events as a congregation.

Staffing and Resource Needs:

- Service attendance coordinator (parent volunteer) and funds for student rewards
- Religious school staff/rabbi/lay religious leaders to develop/lead curricula for parents to learn prayers and rituals and to develop grade level service programming
- Religious school staff/parent volunteers to coordinate class progress meetings
- Rabbi/lay religious leaders to develop/lead curricula for D'var Torah study groups
- Rabbi to develop/lead interfaith Hebrew bible study group
- Adult education programming coordinator (paid or member volunteer) and funds for outside speakers
- Religious school staff to coordinate with adult programming and service attendance coordinators
- Additional efforts on the part of education, religious affairs, social action, and communication committees to coordinate curricula and events

Implementation Timeframes:

- Attendance program: one to two months
- Grade level oriented services: three months
- Class progress meetings: one to two months
- Parental prayer learning program: four to six months
- D'var Torah program: one year

- Interfaith Hebrew bible study group: one year
- Partnering with other institutions to share adult education programming: one year

## Hessed VeTikun Olam (Social Action)

### *Guiding Principles*

Congregation Etz Hayim is a welcoming spiritual home for our community, fostering unity and connection as we journey together on a path toward holiness. The Social Action Committee (SAC) works to make a profound difference through actions large and small. We care for each other, our community, and the world around us.

### **Strategy 1**

Serve the internal CEH, local Jewish, and Arlington communities.

### *Tasks*

- Within CEH, seek to bring existing programs under SAC or alternatively to coordinate closely with SAC:
  - Ask Bikur Holim and Bereavement committees if they want to be considered as functioning independently under SAC umbrella. We envision this would be mainly for the purpose of recognizing and celebrating their work as part of CEH's Social Action mission, but we will ask if they want to more assistance or coordination of activities.
  - Among its other activities, Bikur Holim raises money to help people financially, which relates to CEH goal of Sustainability. If Bikur Holim comes under SAC umbrella, then SAC will relate to all aspects of CEH vision.
  - Seek to bring Seats at Passover under SAC.
- Within Jewish Community: Participate in existing efforts to deliver Passover meals to homebound or those in need, explore other possible activities.
- Within Arlington Community: Continue current activities, including AFAC donations, meal preparation for homeless, Meals on Wheels, park clean-up, Sukkot in Spring, and explore others.

### **Strategy 2**

Increase participation by providing enjoyable and fulfilling volunteer experiences for all interested Etz Hayim members by defining available projects and/or carrying them out in an organized fashion.

### *Tasks*

- Publicize and describe volunteer opportunities in Chronicle and Weekly emails.
- Create calendar at least 6 months out.
- Tailor activities to different cohorts within CEH (families, kids, couples, singles), and also have activities that bring different cohorts together.
- Convey the impact of volunteers' work on the community served and on CEH. Celebrate successes.
- Develop good relations with service providers and the communities served, by establishing good communications and ensuring we have enough volunteers for projects.
- Present a summary of activities and success stories to the Board once or twice a year.
- Do only a few projects, but do them well.

### **Strategy 3**

Emphasize connection between Jewish precepts and social action, i.e., social action as part of Jewish identity.

### *Tasks*

- Encourage people to do Social Action on their own and report back.
- Integrate Social Action into religious school curriculum; for example, ask teachers to have each class vote and adopt a service project for the year
- Join with other congregations in our social action efforts?

### **Strategy 4**

Educate Congregation about Social Action concepts

### *Tasks*

- Bring outside speakers during services.
- Identify Torah portions that emphasize social action.
- Devote occasional sermons to different aspects of social action.

### **Strategy 5**

Develop a cadre of project leaders

### *Tasks*

- Hold info/training sessions.
- Provide ongoing guidance throughout projects.
- Create recognition program?

## **Kayamut (Sustainability and Development)**

### *Guiding Principles*

Our goal is to provide for financial stability and sustain and enhance our congregation for future generations.

### *Task 1 - High Holiday Tickets*

The Board should consider including High Holiday tickets with membership, rather than separately charging for them. This is consistent with the practice of most synagogues in the area. Given that CEH's dues are slightly below those of other comparable synagogues, we could increase membership dues to offset any decrease in ticket revenue. Many members would prefer one charge (including membership fees and High Holiday tickets) rather than two separate charges. Also, many members find the a la carte approach to High Holiday tickets confusing. In fact, the perception of having multiple choices and different charges, make some people feel that CEH is priced higher than other local synagogues. Including High Holiday tickets with membership would also be less burdensome on our bookkeeper.

We should bring this proposal to the board for a vote by the end of 2015 so that we can incorporate the change into next year's budget cycle. Our recommendation is to increase dues about 8% spread out over the next 3 years to cover the lost high holiday ticket revenue.

### *Task 2 - Congregation Etz Hayim Legacy Implementation Plan*

#### Overview

CEH currently has no organized effort to encourage members of the community to remember CEH in members' estate plans. As such, the synagogue receives almost nothing in the way of bequests. The creation of such a program seems advantageous for the following reasons:

- Some people who are worried about having enough money for their retirement may be able to be more generous in their estate plan when they no longer need the money.
- The mechanisms for the bequest include Wills, beneficiary designation of IRAs, beneficiary designation of life insurance, and various other means. This makes more pockets of money available for a member wishing to be generous.
- The long term financial health of the synagogue can be greatly increased by a successful campaign. If a member with an estate of \$1 million were to bequeath to us 10% of the estate, we would receive \$100,000. That is equivalent to 8% of our current operating budget.

Federation of Greater Washington has very helpful resources to assist the formation of the campaign. We would need to decide who would do the solicitations, and with which members to begin the discussion. Making the process as easy as possible is important, as we do not want people with good intentions to fail to make it to the lawyer to change the Will. As such, a sample codicil, from Federation, allows a member to make the bequest on one page which becomes amended to the Last Will and Testament.

#### Action Plan

- Ensure, by board resolution, that the organization has a clear policy on the treatment of bequests including minimum endowment levels and donor reporting
- The creation of a case statement advocating legacy gifts to the synagogue
- The development of strategic and marketing plans
- The creation of a Declaration of Intent to leave a legacy. While this bears no legal standing, it serves a similar purpose to a pledge in that it gives the organization opportunity to steward the pledge
- A solicitation of your board of directors for a legacy gift, before any campaign is made public
- A public launch of the initiative
- Execution of a stewardship plan
- Formalization of the gift

## Hanhagah (Leadership)

### *Guiding Principles*

We believe our Congregation is strengthened and enhanced by encouraging Congregational involvement and cultivating a new generation of lay leaders, who will share ownership of and responsibility for our Congregation with our clergy and professional staff.

### *Strategy 1*

We will create a process for identifying and cultivating new leaders.

### *Task*

In addition to the officer/director Nominations process set forth in the Bylaws, a bolstered Nominations Committee should: a) meet once per year to thoroughly review the Membership list to identify potential leaders and match them with proposed programs, projects, or committees; b) meet another 2-3 times per year to discuss new leadership cultivation efforts; c) actively engage members throughout the year to encourage increased Congregational involvement.

Where We are v. Where We Want to Be: Congregation Etz Hayim has a small cadre of dedicated and capable lay leaders. However, we face problems in regeneration of the lay leadership, partially through the natural challenges of being a relatively small Congregation, and partially due to the lack of a leadership cultivation process and due to a short-sighted nominations process. Specifically, as to the former, among the challenges of being a relatively small Congregation are naturally having a smaller leadership talent pool from which to draw; burnout among those who have been serving in the leadership for a long time; and, consequently, an extremely limited pool of leaders who are both qualified to become and interested in becoming President of the Congregation. As to the latter, we have an ad hoc Nominations Committee, consisting of three members, that is established each March and then scrambles to identify a slate of leaders for the coming year (or, pragmatically, two) by April. To compensate for our natural challenges in leadership depth, as well as to create and identify more opportunities for more members to engage in meaningful leadership roles that help foster their connections to the congregation, we believe that a bolstered “Nominations and Leadership Committee” should be a standing committee that actively works year-round to identify and cultivate leaders through “inreach” amongst the membership and through enhanced organization that is geared towards promoting a sulam (ladder) approach to development of new leaders.

Proposed Implementation Steps:

- A new “Nominations and Leadership Committee” should be established as a standing committee that actively works on leadership identification and cultivation throughout the year, culminating in the late winter/early spring nominations process.
  - The “Nominations and Leadership Committee” should be composed of a core group of senior clergy and lay leaders, in addition to a representative of each of several key demographic groups within the larger Congregational community.
  - Core group of senior clergy and lay leaders:
    - Rabbi Bass (i.e., senior Rabbi)
    - Immediate Past-President (by custom, chairs the Nominating Committee provided for in bylaws)
    - First Vice-President (presumptively the next President)
    - VP for Membership (leadership identification and cultivation will be reliant upon enhanced membership “inreach”)
  - Examples of other key demographic groups within larger Congregational community, some or most of whom should have a representative on this committee:
    - Services attendees
    - Preschool
    - Religious School
    - Young couples
    - Interfaith
    - “Seasoned veteran” members
  - Open question: how many should be on the committee (8 or 9)?
  - The “Nominations and Leadership Committee” should formally meet quarterly, with one of those meetings occurring during the nominations period prescribed by the Congregation’s bylaws.
  - How the proposed committee fits within the Congregation’s bylaws:
    - The ad hoc “Nominating Committee” provided for by the Congregation’s bylaws would be subsumed within the proposed committee.
    - Bylaws provide for Nominating Committee “consisting of three (3) members of the Congregation.” Options for dealing with that:
      - Construe “consisting of” as “consisting of at least”
      - Retain the Nominating Committee provided for in the bylaws as a subcommittee of the “Nominations and Leadership Committee”
      - Change the bylaws to make everything sync up
    - We may need to amend the bylaws to add the “Nominations and Leadership Committee” as a Standing Committee.
- The “Nominations and Leadership Committee” should maintain a spreadsheet of prospective leaders. While the specifics of the spreadsheet can be determined at the implementation stage, the task force offers an initial recommendation that:

- The spreadsheet should have a column for programs and projects to chair; one for committees to chair; one for board membership; one for Officer position; and a large one for notes.
- The spreadsheet should contain anticipated timelines for escalation to certain functions.
- In initial formulation of the spreadsheet, membership applications should be reviewed to help identify talents and interests conducive towards leadership track.
- Prior to initial formulation, need to identify all programs and projects for the upcoming year.
- The spreadsheet should be viewed as a living document to be updated whenever warranted (new member joins; new leadership talent or interest identified via “inreach,” new project or program idea is generated, etc.).
- In preparation for at least one of the quarterly meetings of “Nominations and Leadership Committee”, chairs of other Congregational committees should be asked to identify who “superstar” members of their committees are.
- Anytime a note is made on the spreadsheet, the date the note is made also should be identified.
- Leadership identification and cultivation efforts should synergize with the “buddy system” (or whatever it will be called) via “inreach”.
  - Underlying principles:
    - These efforts will be most effective via one-to-one “inreach”.
    - These efforts will take some of the inreach (and leadership identification and cultivation) burden off of the clergy and VP for Membership.
    - “Senior buddies” (or whatever they’re called) should be asked to identify potential leaders to committee.
    - Committee should identify strategies for committee member(s) or “senior buddies” to reach out to buddies in general and identified targets in particular re. leadership interests and abilities, and to recognize when a member is self-identifying an interest in learning more about leadership positions.
    - Prospective leaders identified via this process, and results of inreach per the prior bullet, should be recorded on the spreadsheet described above.
    - Committee should also identify strategies to mentor prospective leaders identified via this process.
- Senior lay leaders and clergy may help identify and engage potential new leaders in Jewish communal leadership training opportunities (i.e., outside the shul).
- Open question: do a new, short survey of talents and interests?

- Perhaps geared towards helping to identify prospective leaders?
- Some membership application data is quite outdated.
- Expectations of leaders:
  - Be upfront with what leadership positions entail (whether chairing a program, committee, etc.) – no bait and switch.
  - Keep up with expectation that each Board member be active in two committees (consider creating opportunities for Board members to discuss their committee involvement, such as rotating responsibility for committee reporting at Board meetings, articles in Chronicle, announcements, etc.).

## *Strategy 2*

We will foster shared ownership and responsibility through improved communication

### *Tasks*

All Executive Committee meetings will include calendar discussions (near term events and any new proposals for longer term events).

Where We are v. Where We Want to Be: Notwithstanding the relatively small size of Congregation Etz Hayim’s membership, lay leadership, and clergy and professional staffs (“staff”), we frequently encounter problems in communication. These may manifest themselves in messaging not making it from one internal group to another (resulting in, e.g., flawed external messaging ultimately), calendar conflicts on specific dates due to one key group of leaders and/or staff being unaware of something having been scheduled (or contemplated) by another key group of leaders and/or staff, big picture calendar conflicts where a proposed event or series of events does not match or reflect the contemplated programs or priorities of some leaders and/or staff, etc. We want to get to a place where leaders and staff are not caught by surprise by the calendaring of programs, there is sufficient notice of programs among all leaders and staff to enable proper planning, any concerns about prospective programming have been fully vetted and satisfactorily resolved prior to it being calendared, and scheduling details are agreed-upon and squared away so as to promote external messaging that gets it right the first time.

### Proposed Implementation Steps

- Each meeting of the Congregation’s Executive Committee will include a 90-day advance look at the calendar to ensure coordination between lay leaders and staff, as well as to ensure that each calendared program has an “owner.”
- Each meeting of the Congregation’s Board of Directors will include as an agenda item time for the proposal of ideas for new programs

- Attendance at the annual calendar meeting will be expanded to also include all committee chairs

#### Potential Additional Tasks Identified

##### *Strategy 1*

We will create a process for identifying and cultivating new leaders.

##### *Tasks*

- Establish a paradigm for wooing members to get more involved (i.e., a glide path from identification to involvement).
- Identify and engage potential new leaders in Jewish communal leadership training opportunities (i.e., outside the shul).
- Revisit the role of the Men's Club and Sisterhood in the shul's leadership structure.
- Further down the road, explore the idea of term limits for Board Members.

##### *Strategy 2*

We will foster shared ownership and responsibility through improved communication.

##### *Tasks*

- Every proposed calendar item will be vetted with a core group of clergy, professional staff, and lay leaders (perhaps via a dedicated email group).
- There will be an Executive Committee conference call once/month, approximately midway between scheduled Executive Committee in-person meetings.
- Lay leadership, clergy, and professional staff will engage in periodic team building events, generally not oriented around shul business.

# Fact Book/Committee Interviews

**Committee Name:** Bikur Cholim

**Chair:** Sherri Edgar-Wasserman

**Members:** Andrew Lovinger, Len Wasserman, Susan Hamm, Deena Ackerman, Will Stevenson, Marcia Kerchner, Jerry Jacobs, Sylvia Gordon, Martha Shmokler, Rabbi Bass, Rabbi Ackerman, Mark Halpern, Hilary Silvert Newell, Marsha Singer, Deborah Meyers, Paula Alcorn

**Meeting frequency:** Usually last Sunday of the month

**Key tasks:** provide assistance to those in need in our community, primarily those who are ill

**Reference in by-laws:** Don't think so

**Trends:** Anecdotally at least, we believe the congregation is getting younger. Not as many elderly compared to the number of babies being born.

**Most important internal organizational facts:** Everyone is busy, from committee members to community members to rabbis. Considering changing time of meeting to accommodate rabbis' schedules.

**Goals – Last Year:**

- Help people in need
- Get more people involved to volunteer

**Goals – This year:**

- Help people in need; identify all who are in need and determine better ways to find out about people who are in need. Engage with Marni to find out how we can better work with her to obtain relevant information.
- Determine the boundaries of Bikur Cholim:
  - The line between Bikur Cholim and a new Mitzvah/Social Action Committee; stay in our own lane.
  - Determine whether BC should be reaching out more regularly to those who are bereaved.
- Consider changing organization of this committee:
  - Smaller Bikur Cholim “executive” committee meets once a month in the evenings (could sometimes be by phone) to determine who needs what help. These meetings would need to be coordinated with the rabbis so at least one of them can join.
  - Executive committee would parse out the needs to the larger group on a by-need basis.
  - BC “Large” group would meet twice a year, including everyone interested in helping at any level, and include an education component.

**How can the Steering Committee and synagogue leadership help you be successful?**

Look into creating a Mitzvah/Social Action Committee

**Committee Name:** Religious Affairs Committee

**Chair:** Jonathan Arden

**Members:** 10+

**Meeting Frequency:** Monthly

**Trends:**

- Chair is not very familiar with impact of regional/local external forces on the committee's work, but results of Pew study reinforce committee's interest in how to keep conservative Judaism a vital force
- Starting to look at national and historic perspectives on Conservative Judaism
- Has been grappling with conservative responsa and whether and how to incorporate them into Etz Hayim's practices (e.g., eliminating requirement for cohein and levite aliyas(?))
- Membership of committee includes the rabbis and has been very stable for several years
- Core group is good for providing continuity
- Having newer participants is also valuable to bring a fresh perspective
- It is interesting that the committee chair and VP for religious affairs need not be, or at least haven't been in practice, the same person

**Goals--Last Year**

- The committee never really sat down to establish goals for itself; it tends to implement certain functions, but not really with a strategic approach
- Incorporating more lay participation in service leadership
- Ensuring that religious holidays are run smoothly and successfully
- Addressing religious practice questions as they arise
- Began to consider implications of Pew research and how Etz Hayim may wish to adapt--a good start

**Goals--This Year**

- More effort on considering how to keep Conservative Judaism vital (there has been no thought given to/interest expressed in changing the religious perspective of the synagogue)
- Wants to give more thought to how to answer this question

**How can the Steering Committee and synagogue leadership help you be successful?**

Lack of written procedures or even introduction to "committee protocols" makes it more challenging than necessary for new leaders and participants; for example, the chair had been unaware that a master calendar existed for committee meetings

**Committee Name: Bereavement Committee**  
**Chair: Jerold L. Jacobs**

The Committee is informal and recruits members on an ad hoc basis to deal with individual bereavement situations. However, there are certain regular members:

Rabbi Lia Bass	Ex officio
Rabbi Josh Ackerman	Ex officio
Marni Corsaro/CEH staff	sends e-mail notifications to CEH members
Michael Stein	Ex officio as VP Religious Affairs; supervises Shiva Minyan leadership with Rabbis
Dr. Jonathan Arden	Ex officio as Chair, Religious Committee
Jerold Jacobs	Overall coordinator with Rabbis, VP Religious Affairs, and Rel. Comm. chair
Laura Jacobs/Sonya Okin	Sisterhood catering representatives for Shiva
	Sherri Edgar Wasserman Bikur Cholim Chair – This Committee assists with Shiva catering and other family needs after Shiva
Religious Comm. members	Assist Minyan attendance and leadership

### **Meeting Frequency**

The Committee does not hold regular meetings. Decisions are made by e-mail exchanges and telephone calls.

### **Key tasks**

The Committee assists the Rabbis in all aspects of bereavement, as needed. This may include assisting the family in funeral home and cemetery arrangements, the funeral services at CEH and the cemetery, Shiva Minyanim, and general comfort.

### **Trends**

CEH recommends use of Torchinsky Hebrew Funeral Home and King David Memorial Gardens. CEH has established relations with both. Use of other funeral homes or cemeteries creates complications but is do-able. There is price competition among funeral homes, which may affect choice. -This Committee's work is sensitive and is too upsetting for some folks to do. We have a small number of dedicated participants, which is sufficient for our needs.

### **Goals**

Every year our goal is to assist in carrying out dignified funerals in accordance with Jewish law and custom and to comfort and assist the bereaved in making and carrying out funeral arrangements, Shiva Minyanim, etc.

### **How can the Steering Committee and synagogue leadership help you be successful?**

The Steering Committee and synagogue leadership can help our Committee to be successful by attending funerals and Shiva Minyanim.

**Committee Name:** Fundraising Committee  
**Chair:** Jerold L. Jacobs, VP Fundraising

**Members:**

The Committee is staffed by the Subcommittee chair of each fundraising activity:

Kol Nidre Appeal	Scott Burka, ex officio (President’s solicitation)
Yizkor Memorial Booklet	Martha Shmokler, Jerold Jacobs
Artist Expo	Laurie Effron
Auction and Wine Tasting	Jared Hendler, Check-in/Check-out Jill Shenk, food/beverage & décor Jill Rabach, donation solicitation Alan Savada, donation solicitation Scott Burka, wine arrangements Marni Corsaro and Marcy Burka, spreadsheets and bookkeeping
8th Night of Chanukah	Jerold Jacobs
Purim Baskets	Sonya Okin
Extra Yr. Capital Fund Gifts	Phil Rosenthal, Jerold Jacobs
Tree of Life	Phil Rosenthal, Jerold Jacobs

**Meeting Frequency**

Committee does not hold regular meetings. Decisions are made by e-mail exchanges or face-to-face discussions between Chair and Sub-chair.

**Key tasks**

Committee has a fundraising goal for each activity. These goals are stated in the CEH annual budget.

**Trends**

- Committee work attracts a large number of CEH members, and more may be recruited on an ad hoc basis.
- There is good esprit de corps among committee members. They like what they are doing and the tangible measurements of success.

**Goals – Last Year**

Our goal was to exceed the previous year’s revenue for each event. We did so for every activity except Kol Nidre Appeal and Auction.

**Goals – This Year**

Our goal this year is to exceed last year’s revenue for each event.

**How can the Steering Committee and synagogue leadership help you be successful?**

The Steering Committee and synagogue leadership can help our Committee to be successful by financially supporting all of our activities.

**Committee Name:** Religious Education Committee  
**Chairs:** Elisa Rosman, Jill Shenk  
**Members:** 9 members with kids of various ages and needs  
**Meeting Frequency:** 5-6 meetings a year

### **Trends**

- What are the most important internal organizational facts we should know about (i.e. attendance, enrollment, program satisfaction or effectiveness?)
- Committee has no governing role, for example, it does not create curricula, however, several years ago curricula were developed by an outside expert, no idea if implemented
- Class sizes are on the rise
- Many improvements since R. Josh Ackerman came on – better staffing, advertising for a special needs specialist
- Communication is an ongoing issue

### **Goals – Last Year**

Goal is to fix standing problems, chief among which is communication (nothing was being clearly communicated, including cancellations and changes to siyyums)

### **Goals – This Year**

- Improve communication
  - Need central repository for dates
  - Could do more with the website
  - Emails seem to go into a void
  - Need ownership of events so all know who is responsible
    - What goes to R. Ackerman, what goes to the committee
    - Identify individuals responsible or POCs for each event
- Need to spend less time talking and more time acting/making decisions
  - Need to pick a youth group – ultimately no one will care which it is, just that there is one
- Looking to expand to include the preschool
  - Bridge the gap between preschool and religious school
  - Expand the committee to include Alexis and a preschool parent
- Need a more structured program
  - As the class sizes are getting larger, need more structure and programming
  - Want to keep the 8th graders involved

### **How can the Steering Committee and synagogue leadership help you be successful?**

- Need a better calendar for synagogue
- Ideally make it one that families can subscribe to allow for syncing family calendars with the shul's

# SWOT analysis

## ***Strengths***

- Family oriented and Gemutlich
- Accepting of families with a non-Jewish spouse
- Convenient location
- Welcoming, open, and comfortable sanctuary
- Convenient location
- Variety of service styles while retaining Conservative core
- Allow community members to assume leadership responsibility
- Incorporating new members into decision making/ leadership roles (@services)
- Manageable size congregation
- Diverse membership (different races, ages, opinions, lives)
- Professional staff is excellent at trying to respond to congregant requests
- Numerous educational opportunities (children/adult, during and after services, during the week, different times)
- Welcoming to newcomers
  - New people are welcomed by many people upon arrival and throughout visit
  - Very friendly
  - New faces are welcomed during services and during oneg/Kiddush
  - Extremely friendly to kids
- Close knit community – people feel cared about.
- Fiscally well run – we have been operating on black for the last five (+) years.
- Challah that is squishy and fresh
- Excellent Preschool and Religious School. Good numbers for both. Preschool is a good feeder into Religious School. Growth of both schools in past years has increased the number of younger families.
- Rabbis are great, not aloof, but quite the opposite; approachable.
- Stability in religious leadership (Rabbi just signed a 10 year contract, new Rabbi adapted well quickly to the congregation).
- Majority of respondents are pleased with the Congregation, and that we fall well with Conservative Judaism, traditionally oriented yet open to change.
- The numbers we had on the haguim, during a weekday, were impressive.
- People end up learning a lot here.
- People are genuine, you do not have to be fancy, and no one is trying to be better than anybody else.
- Focus on Youth Education.
- Very participatory – discussions, people helping during Holidays, lay led ritual involvement.

*Summary.* From all of those, we feel that we can capitalize on our openness to interfaith couples, our Rabbis, our welcoming to new people, while strengthening all the other aspects that we feel we are doing well.

## ***Weaknesses***

- Numbers of membership totals not growing despite being a priority for a long time
- Lack of leadership depth
- Communication
  - Unclear what exists, who to ask, what's going on, calendar coordination, who is the POC
  - Lack of clarity and organization can reflect poorly
- Member retention and participation post Bar/Bat Mitzvah
- Community building opportunities outside of school and davening
- Too few sugar parents, and no discernible strategy to attract them. (Unable to attract big donors)
- Too many fundraising events
- Membership + Synagogue fees can seem high especially without HH tickets included
- Meetings/events often lose focus trying to do too much in too little time
- Not many singles, so less of a draw for single young professionals
- Some feeling of disrespect for those not as well versed in Judaism (law, kashrut, you name it)
- Small size means one person can poison a group. No place to hide or bury.
- We have some difficult people. I worry we deal with them without confrontation at the expense of some other members of the community.
- Busy families
- Not competing effectively for people's time
- Not sure we have really identified what our congregants want
- Lack of synergies between different groups/demographics
- Many unlettered members – harder for them to engage
- Non-committed Jews – to Synagogue life
- Minyan only once a week
- -Aging population needs transportation to attend activities
- I have been told we can appear clique-ish to some new people
- 20% of membership does 80% of the work
- Building limitations
- Lack of Hazan

*Summary.* About all of these, our conversation focused on the need for in-reach to our membership.

## ***Opportunities***

- Arlington:
  - has a large # of unaffiliated Jews
  - has many young professionals and families with children moving to the area
  - is popular with young people (and centrally located), close to the Nation's capital
  - has great public schools that makes people look for a good religious school.
  - has more households with children now than a decade ago
  - households with more money
- Judaism is starting to be seen as “not your Bubbe’s religion”
- It is now acceptable, dare I say cool, to culturally identify. In this context, young families may be willing to join.
- Interfaith families are looking for a spiritual home.
- People are looking for spirituality.
- With Israel @ war with Hamas people want to identify with Jewish organizations.
- Opportunity to work with outside organizations, including PJ library, Global Day of Jewish Learning, NJOP
- Transitions in other Congregations – there is attrition
- Correlation of Congregation and Arlington Way
- Work with interfaith groups
- Reaching out to Jewish institutions in the area
- Better use of Social Media

*Summary.* Together we identified that we should explore the possibility of reaching out to nearby public schools and see if we can do some holiday programming together, for after-school care and parental involvement latter. We also thought that we should capitalize on our open stance regarding interfaith families, and create more opportunities for interaction, not only one interfaith event a year.

## ***Threats***

- It is not “in” to be Jewish here.
- According to the Pew report, Conservative Jews are moving to the Reform movement, and we have observed this trend in our own Congregation
- Events in Israel
- People who disagree with some aspect of how Israel is handling the war with Hamas are distancing themselves from groups that they see as “Israel is always right”
- Israel can be tough to take
- Lack of time by over-programmed families
- It is hard to put religion as a priority on any given day with all the other busy things to do
- Everyone is over-programmed; exhausted on Friday nights, other Sat activities, other parenting, work, communal affiliation – no time for shul leadership

- Extended families do not live nearby
- Increasing opportunities for self-promotion by other congregations
- US is less ethnically/racially segregated. While my parents only knew Jews, it is not true of my generation
- High transiency and tendency for non-affiliation
- Lack of motivation to affiliate if childless or no kids within a few years of Bar/Bat Mitzvah
- People see synagogues as posing time or financial commitments they cannot afford
- Spirituality that is devoid of religion
- More traditional shift by reform movement
- Competitive and comparable congregations
- USCJ's adamant stance on not totally welcoming interfaith couples, especially the non-Jewish spouse
- Intermarrying offers families more alternatives, and may make families less committed
- Interfaith families that do not get to us, because we are Conservative.

### ***Summary***

We believe that it is important to continue to define who we are and follow that vision. We cannot be everything to everyone. It is important to clearly define who we are.