

## Beth Am Strategic Plan 2021 (5781)



Dear Fellow Beth Am Members,

Having just observed the High Holy Days, we look forward to the coming year and envision gathering again in our beautiful synagogue. At Beth Am, we have been hard at work planning for the process of “coming home” in 5782. To do this effectively requires creativity, patience and strategy.

In the preceding year of 5781, because of a particularity of the Jewish calendar, we heard the well known, albeit rarely read, story of Solomon. In this famous tale, two women came before King Solomon each claiming to be a baby’s mother and seeking a solution. When the king suggested they simply cut the boy in half, one of the women insisted the child’s life be spared and that he be given to the other. Solomon knew immediately that the one who spoke up was the child’s mother.

Solomon was known for his great wisdom, not merely because of the breadth of his knowledge, but because he was a strategic thinker. He was able to devise novel solutions to age-old challenges that advanced an agenda of truth and justice.

At Beth Am we too have strategic thinkers and their work is reflected in a comprehensive Strategic Plan based on widespread congregational input, which will guide us in our pursuits, endeavors and goals in the coming years. We’re grateful for the outstanding leadership of Paula Singer, Ashley Pressman and Adam Kutcher who steered the process – as well as to the USCJ for its able professional guidance throughout, and to the many congregants who participated.

Many recommendations of the plan are already being implemented. Others will be explored in the coming months and years. We encourage you to review the Strategic Plan by reading the executive summary, along with our Mission, Vision, and Values Statement. And we hope you’ll consider helping our committees maintain and advance the work of Beth Am.

Following the High Holy Days, we continue to celebrate the holy work of our community. May we go from strength to strength, and may the work of so many enable our congregation to thrive for years to come.

Adina Amith, President  
Daniel Cotzin Burg, Alexander Grass Rabbinic Chair

## Strategic Plan 2021 (5781) Participants

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# Executive Summary

## Strategic Planning Process

Strategic planning is a systematic, formally documented process for deciding the handful of key decisions an organization must get right in order to thrive over the next 3-5 years. Beth Am joined five other synagogues in May 2019 in a strategic planning program sponsored by the United Synagogue for Conservative Judaism (USCJ). The program guides the cohort through a 12-15 month process to develop a strategic plan while building congregational leadership, conversing with a broad cross-section of congregants, and leveraging strengths of professional staff. The key steps were:

- Gathering data about internal operations.
- Assessing the wants and needs of the community.
- Creating mission and vision statements.
- Developing strategies that best balance congregational goals and capacity.
- Producing a final report and recommendations for presentation to the Board of Directors and congregation.

The Board identified three co-chairs for the Strategic Planning Committee (Paula Singer, Ashley Pressman, Adam Kutcher, hereafter 'the SPC') who were responsible for executing the strategic planning process on behalf of the Board and Executive Committee. Numerous others also contributed. The process started in May 2019 and the report was submitted to the Board of Trustees in August 2020.

The vast majority of the work was completed prior to the introduction of COVID-19 to the United States. Thus the results of this process reflect a pre-pandemic viewpoint and some tactics may need to be adjusted to reflect the realities of living with the novel coronavirus and the practices necessary to keep the community healthy and safe.

Voluminous data were collected into a [Fact Book](#) to orient the SPC and identify current strengths, weaknesses, opportunities, and challenges for Beth Am. These data are reported in: 1) Thriving Communities Assessment (a standard USCJ survey instrument for strategic planning), 2) Congregational Assessment Survey, 3) community conversations, 4) focus groups and interviews, and 5) descriptive statistics. A Mission and Vision subcommittee drafted an overall Beth Am mission and vision as well as 'mini-mission' statements for each task force.

The resulting analysis led to the creation of six Task Forces: 1) Financial Sustainability, 2) Youth and Family Education, 3) Member Engagement and Lifelong Learning, 4) Leadership and Governance, 5) Ritual and Prayer, and 6) Neighborhood Engagement and Social Justice. Task Force work included: a) editing the mini-vision, b) examining available data, c) collecting more data if needed, d) discussing and analyzing the data, and e) reporting recommendations. Recommendations were

prioritized by the group of SPC members and Task Force co-chairs as to which would have the greatest impact on Beth Am in the next 3-5 years.

## Highest Priority Strategies

### 1. Build Up Beth Am as the House of the People

- Increase individual feelings of connectedness and belonging by:
  - Encouraging members to connect Jewishly outside of shul by increasing small-group, Zoom and neighborhood-based cohort building opportunities including home rituals and informal gatherings.
  - Developing strategies to effectively attract and socialize new members through innovative marketing and personalized outreach, following initial participation in events and programs.
  - Expanding the role of the Membership Committee to include a buddy program for the first year of membership and a check-in system for existing members with limited participation.
  - Expanding the role of the Congregant to Congregant program to best meet the needs of Beth Am members at various points in their lives by embracing them with lovingkindness and compassion.
- Further a sense of community and spiritual connectedness through prayer & learning by:
  - Expanding holiday based family education.
  - Expanding the lifelong Jewish learning committee to foster lay-ownership of cohort-based and informal gathering opportunities.
  - Building comfort with service and home rituals through innovative educational methodologies to lower barriers to participation.
  - Offering high quality K-6 programming and formal learning opportunities

### 2. Make Beth Am People-Powered

- Identify and train new leaders. Specific opportunities can include:
  - Service Leaders (focusing on engaging post-b'nai mitzvah youth) to support Shabbat and holiday programming, as well as to lead shiva minyans.
  - Informal Cohort Leaders/Connectors to foster neighborhood-based cohorts and serve as informal educators and community-builders.
  - Fundraising Specialists to find new ways to generate revenue for Beth Am.
- Increase decision-making and leadership structure transparency for programming and policy.
  - Review by-laws, organizational structure, and roles as recommended by the Leadership and Governance Task Force.
  - Create policies and templates for approving and creating programs, including clear guidelines for identifying human and financial resources needed.

- Create guidelines and practices regarding transparency of Executive Committee, Board and Rabbinic decisions regarding policy and programming.
  - Strengthen leadership development, using internal resources and external partnerships.
    - Partner with Jewish and secular organizations to offer leadership development.
    - Create innovative and accessible resources to gain skills in key areas such as program planning, recruitment, and leading services.
- 3. Fully Activate Beth Am as a Congregation Informed by Social Justice**
- Revise dues structure to lower barriers to entry.
  - Align the Social Action Committee and In, For, Of, Inc. (IFO) to clarify and amplify their work.
  - Expand and market post-Lab social justice advocacy and volunteer experiences.
  - Focus on obtaining grants to raise revenue specifically for social justice initiatives.
  - Embed social justice concepts in board and committee work and events.
- 4. Generate revenue to enable success and future stability**
- Strengthen fundraising efforts by creating a robust development committee to address all types of fundraising, including annual campaign, legacy/endowments, grants, and other revenue generating activities.
  - Explore sponsorship and other innovative ways to encourage Beth Am members to give supplemental gifts.
  - Reinvigorate Beth Am's culture of DIY volunteerism.
  - Create an external marketing initiative targeting families with Lab-aged children, since a large percentage of new members come through Lab enrollment.
  - Engage members with experience in grant writing to maximize opportunities for grants, particularly focused on social action and justice work.
  - Gather the Space Use Task Force again and identify areas for rental income.

## Implementing the Strategic Plan

Strategic planning charts a course for Beth Am's officers, clergy, professional staff, members and volunteers to follow to live our mission, vision, and values over the next 3-5 years. Implementing the strategic plan has several key steps:

1. **Board Approves "Beth Am Strategic Plan 2021 (5781)":** Beth Am's Board of Trustees is the owner of the strategic plan and is accountable for its implementation. By voting to approve the strategic plan developed for the Board by the Strategic Planning Committee, the Board ratifies the content and assumes implementation responsibility.
2. **Board Creates an Implementation Task Force:** The first step is identifying a Chair and a Co-Chair for the Implementation Task Force, pairing where possible a seasoned leader with a rising one. The Chairs then assemble a task force. This may include members of the strategic planning process, members of the Board's standing or ad hoc committees, clergy and/or staff, and member volunteers. The Implementation Task Force routinely reports

progress and risks/issues to the Board on a routine basis, at least quarterly. The Board regularly updates the congregation.

3. **Implementation Task Force Creates Implementation Plan:** The Implementation Task Force creates a time table for implementing recommendations in the Strategic Plan, including short-term, medium-term, and long-term milestones. Based on these time horizons, a one-year implementation plan is presented to the Board. The Board is ultimately responsible for the implementation within year 1. In years 2 through 5, the process will be repeated until the Implementation Task Force has implemented five successive one-year plans and completed implementing the recommendations of the Strategic Plan.

## Acknowledgements

The co-chairs of the Strategic Planning Committee would like to thank:

- The congregation for entrusting us with your thoughts and opinions in numerous surveys and innumerable personal conversations.
- The members of the Strategic Planning Committee for embarking on this 12 month journey with us.
- The members of the Task Forces, for their stubborn curiosity and dedication to the integrity of the strategic planning process.
- Beth Am's professional staff and clergy, for their understanding, openness, and embrace of this difficult process of institutional self-examination.
- The Board for its patience in waiting for this report.
- Our families, who not only gave us the time and space to dedicate ourselves to this process, but who kept confidence in us when we said that COVID-19 was not going to mean delaying this report by another year.
- Our USCJ consultant, Aimee Close, for elevating this task to its rightful place in synagogue life and helping us to recognize that the journey, the "conversation", is as important as the report itself.

## Strategic Planning Process

### The USCJ Sulam Strategic Planning Process

Strategic planning is a systematic, formally documented process for deciding the handful of key decisions that an organization must get right in order to thrive over the next 3-5 years. Beth Am joined the five other synagogues in the seventh cohort of the United Synagogue of Conservative Judaism's (USCJ) Sulam for Strategic Planners (SSP) program. This strategic planning program guides congregations through a 12-15 month process to develop a strategic plan while building congregational leadership abilities, activating and entering into conversation with a broad cross-section of congregants, and leveraging the strength of professional staff. Beth Am embarked on the process in May 2019 and delivered the final report to the Board in August 2020. The key steps in the process are:

- Gathering data about internal operations.
- Assessing the wants and needs of the community.
- Creating mission and vision statements.
- Developing strategies that best balance congregational goals and capacity.
- Producing a final report and recommendations for presentation to the Board of Directors.

## Beth Am's Strategic Planning Committee

The Board identified three co-chairs for the Strategic Planning Committee (Paula Singer, Ashley Pressman, Adam Kutcher) who were responsible for executing the strategic planning process on behalf of the Board and Executive Committee. In coordination with the Executive Committee, the co-chairs invited members to the committee from the Board and Board committees, current and former leaders as recommended by the Executive Committee, and the synagogue's clergy and professional staff. The Strategic Planning Committee members include: Jonathan Fishman, Lisa Akchin, Adina Amith, Lainy Lebow-Sachs, Steve Koenigsberg, David Rothenberg, Rabbi Daniel Burg, Sally Scott, Rabbi Kelley Gludt, Robin Rose-Samuels, and Ilene Salcman. Assisting the Strategic Planning Committee was Aimee Close, a consultant from the USCJ. The Strategic Planning Committee self organized into three subcommittees: Data Gathering, Mission and Vision, and Communications and Engagement.

## Data Gathering Activities

Central to the strategic planning process is the role of data. Data informed the orientation of the Strategic Planning Committee and the Task Forces to the strengths, weaknesses, opportunities, and challenges of Beth Am in the present environment.

The Data Gathering subcommittee was chaired by Steve Koenigsberg and David Rothenberg. Members were Lisa G. Akchin, David Demsky, Carol Doctrow, and Miriam Tillman.

The Data Gathering subcommittee put together a [Fact Book](#) that pulls together data from a variety of sources, including:

- I. **Thriving Communities Assessment (TCA)** - A standard USCJ survey instrument of 62 questions across 7 areas (Vision, Leadership, Managing Change, Operations, Welcoming Participation, Engagement in Torah/Prayer, Social Justice) sent to the Board to identify the Board's assessment of the congregation's strengths and weaknesses and to probe the ideas why these area are or are not thriving (n=30, April 2019)
- II. **Congregational Assessment Survey** - A standard USCJ survey instrument ("SSP Kehilla Survey") of 19 questions sent to the entire congregation to identify the membership's satisfaction with various areas of the synagogue as well as the membership's overall

priorities (n=229, 31.3% of congregation members, July 2019). The survey allows for comparison between Board and membership points of view on key issues.

- III. **Community Conversations** - Qualitative data gathering method to engage broader participation in the strategic planning process. The largest Community Conversation was conducted at the 2019 Annual Meeting (June 2019) and included 80-100 members reacting to a [5 question survey](#) (“When have you felt most connected and engaged in the synagogue? How can we create more experiences of connection and engagement in the synagogue? What are some of the barriers to connection and engagement? What changes would you suggest that leaders make? How might you be able to help?”)
- IV. **Focus groups and interviews**: Several individual and group qualitative interviews using a 9-question interview guide were held with Board committees (standing and ad hoc), key donors, long-time members, and departed members to solicit input into the strategic planning process on strengths, weaknesses, opportunities, and strengths.
- V. **Descriptive Statistics**: Quantitative and comparative analysis of synagogue dues structure membership data (demographics, geographic distribution, child age distribution, membership length, household size), and peer synagogue analysis.

Data gathering culminated in a formal Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis. This analysis and the data upon which it was based guided the Strategic Planning Committee in identifying the key areas to be investigated with Task Forces. Six Task Force areas were identified, including:

- Financial Sustainability, focused on revenue generation exclusively rather than expense reduction
- Youth and Family Education
- Member Engagement and Adult Learning
- Leadership and Governance
- Ritual and Prayer
- Neighborhood Engagement and Social Justice

## Mission/Vision Subcommittee Work

The Mission and Vision subcommittee, chaired by Rabbi Daniel Burg and Sally Scott, with members Cindy Paradies and Brian Whippo began working on an overall Beth Am Mission and Vision as well as “mini-mission” statements for each identified Task Force.

## Task Forces and Task Force Reports

The Strategic Planning Committee sent a membership-wide request for volunteers in Fall 2019, yielding 19 volunteers from among numerous respondents. The Strategic Planning Committee co-chairs assigned volunteers to Task Forces based on their indicated preferences and recruited additional Task Force members to represent a variety of viewpoints. Each Task Force was co-chaired by a Strategic Planning Committee member and a co-chair, included a Board member, and was supported by a Beth Am professional staff member. Emerging leaders were invited to

participate in the Task Forces as well. Task Forces were launched in January 2020 and directed to complete Task Force work by April 1, 2020, which included:

- Editing the mini-vision for their topic area to guide their work,
- Examining the data collected,
- Collecting more data if needed,
- Discussing and analyzing the data, and
- Providing recommendations and a task force report using a report template.

We owe a great deal of gratitude to the hardworking members of these task forces. Task Force members included:

- **Financial Sustainability** - Steve Koenigsberg (co-chair), Jim Jacobs (co-chair), Jim Burger, Becky Eisen, Ana Pavich, Betsy Ringel, David Rothenberg, Ilene Salcman, Jeff Spokes, Jackie Yahr, David Rothenberg (staff)
- **Youth and Family Education** - Adam Kutcher (co-chair), TJ Intner (co-chair), Ariel Winter, Ben Fertig, Claire Tesh, Jane Lincove, Miriam Laufer, Rabbi Kelley Gludt (staff)
- **Member Engagement and Adult Learning** - Sally Scott (co-chair), Aaron Zelinsky (co-chair), Aimee Adashek, Anna Fine Foer, Maggi Gaines, Bonnie Guralnick, Christopher McBryde, Robin Rose-Samuels, Sandy Winters, Rabbi Daniel Burg (staff)
- **Leadership and Governance** - Jonathan Fishman (co-chair), Alan Yuspeh (co-chair), Emile Bendit, Emily Gaines Demsky, Julie Gottlieb, Lainy Lebow-Sachs, Nancy Kohn Rabin, Lynn Sassin, David Rothenberg (staff)
- **Ritual and Prayer** - Ashley Pressman (co-chair), Katie Kline (co-chair), Neri Cohen, Janaki Kuruppu, Jonathan Zenilman, Liz Pittman, Zach Aldouby, Nancy Holder, Desi Rotenberg, Bonnie Stainman, Rabbi Daniel Burg (staff)
- **Neighborhood Engagement and Social Justice** - Lisa Akchin (co-chair), Eli Allen (co-chair), Bobbi Antonazzi, Margo Goldberg, Jackie Oldham, Cindy Paradies, David Rocah, Evan Serpick, Jamie Aaron (staff)

## Prioritizing Task Force Recommendations

Task Force reports were distributed to all Task Force co-chairs in May 2020 in preparation for the recommendation prioritization meeting held on 3 June 2020. Task Force co-chairs each presented their Task Force's recommendations and then the group held a vote to identify the recommendations that, in the group's view, would have the greatest impact on the synagogue in the next 3-5 years. Every voter had six votes to distribute among one or more recommendations. The group discussed the results and identified high level themes among the entire recommendation set.

## Final Report and Board Approval

The Strategic Planning Committee assembled this Beth Am Strategic Planning report in June/July 2020 for the Board, which voted on its acceptance in August 2020.

# Beth Am Synagogue: Our Mission and Vision

## **Our Mission**

To seek Jewish responses to life's biggest questions. To foster sacred community in Reservoir Hill. To pursue justice in Baltimore and beyond.

## **Our Vision**

At Beth Am, Jews and their loved ones gather to engage in meaningful community building and discovery. As an intergenerational community of seekers, we draw on the depth and rootedness of the Jewish textual tradition. We value opportunities to connect with the ineffable oneness our tradition calls God. We embrace healthy skepticism but resist cynicism as we lead lives of curiosity and relevance.

As a do-it-yourself congregation in an historic urban synagogue, we have a deep sense of connection to place. We align our synagogue's thriving with the well-being of our neighbors and the flourishing of our neighborhood. Our location in an historically Jewish and majority Black community motivates us to build relationships with our neighbors, work to dismantle systemic racism, and pursue justice for our city, country, and planet.

We welcome newcomers with open arms. As a "House of the People," we are an assembly of generations gathering in shared spaces to joyfully explore life's journey in sacred fellowship. We seek ways to map our ancient texts and traditions onto the 21st century's most pressing challenges. In so doing, we seek the universal expression of particular Jewish ideals and values.

Beth Am'ers interact with our shul in various ways. When we gather, we cherish each other's company, savor good food, laugh together, or enjoy the creative arts. When we daven (pray), we take comfort in familiar melodies and also value the infusion of new tunes and approaches that shake us from complacency. When we advocate, organize, and march for justice, we do so with passion and purpose.

## **Highest Priority Strategies**

Task force recommendations represent valuable ideas for strengthening congregational sense of community, financial stability and embracement of social justice and the surrounding neighborhood. The main themes that emerged became the key strategic areas for the implementation task forces to focus on. These recommendations take into account that Beth Am continues to be a DIY congregation with deep ties to the Reservoir Hill neighborhood. We expect

that our DIY approach will merge seamlessly with the latest trends in developing engagement, participation, connectedness, and leadership.

## Build Up Beth Am as the House of the People

From Thomas Putnam's Bowling Alone to Jewish community studies nation-wide, the pattern of participation preceding membership continues to emerge as a clear trend in American Jewish (and secular) society. Beth Am should focus on deepening engagement and participation opportunities, particularly those that build social ties and are relevant to people's interests with the goal of creating "sticky" membership. Specific recommendations include:

- Increase individual feelings of connectedness and belonging by:
  - Promoting friendship and fellowship by encouraging members to connect Jewishly outside of shul and increasing small-group and neighborhood-based cohort building opportunities including home rituals and informal gatherings.
  - Developing strategies to effectively attract and socialize new members through innovative marketing and personalized outreach, following initial participation in events and programs.
  - Expanding the role of the Membership Committee to include a buddy program for the first year of membership and a check-in system for existing members with limited participation.
  - Effectively market formal and informal youth programs to encourage people outside of the Beth Am community to explore Beth Am's offerings.
  - Expanding the role of the Congregant to Congregant program to best meet the needs of Beth Am members at various points in their lives by embracing them with loving kindness and compassion.
- Further a sense of community and spiritual connectedness through prayer & learning by:
  - Expanding holiday-based family education.
  - Expanding the lifelong Jewish learning committee to foster lay ownership of cohort-based and informal gathering opportunities.
  - Building comfort with service and home rituals through innovative educational methodologies to lower barriers to participation.
  - Offering high quality K-6 programming and formal learning opportunities

## Make Beth Am People-Powered

From its origins as an entirely lay-led congregation to today's thriving membership with a dedicated staff and clergy, Beth Am has always been a DIY (Do It Yourself) congregation where members step in to take ownership of programs. The congregation can foster a broader sense of empowered ownership of its activities and direction by actively reaching out to recruit new volunteers. Practicing active listening and offering training opportunities will support these member volunteers as they seek to define their own communal and spiritual journeys. By increasing transparency, Beth

Am will create clear protocols for programming and policy-making so that the congregation can live its values as a place where everyone's voice matters. Specific recommendations include:

- Identify and train new leaders. Specific opportunities can include:
  - Service Leaders (focusing on engaging post-bnai mitzvah youth) to support Shabbat and holiday programming, as well as to lead shiva minyans.
  - Informal Cohort Leaders/Connectors to foster neighborhood-based cohorts to serve as informal educators and community-builders.
  - Fundraising Specialists to find new ways to generate revenue for Beth Am.
- Increase transparency of decision-making and leadership structure for programming and policy.
  - Review by-laws, organizational structure and roles as recommended by the Leadership and Governance Task Force.
  - Create policies and templates for approving and creating programs, including clear guidelines for identifying human and financial resources needed.
- Strengthen leadership development, using both internal resources and external partnerships.
  - Partner with local Jewish and secular organizations to offer leadership development.
  - Create innovative and accessible resources to gain skills in key areas such as program planning, recruitment, and leading services.
  - Develop plans for recruitment and retention of leaders.
  - Develop a culture of recognizing and empowering leadership in non-traditional roles.

## Fully Activate Beth Am as a Congregation Informed by Social Justice

Beth Am began with a commitment to Baltimore City and serving as a house of the people. That commitment has never wavered in Beth Am's history, even as the ideas of what it means to be a justice-focused organization and a good neighbor within Reservoir Hill have evolved over time. Moving forward, Beth Am will continue to center its values around the idea of being In, For, and Of the Reservoir Hill neighborhood and will expand its understanding and commitment to being anti-racist and justice-focused in its work and orientation. We will weave our social justice priorities through a review of internal and external policies and partnerships. Specifically:

- Revise dues structure to lower barriers to entry.
- Align the Social Action Committee and In, For, Of, Inc to clarify and amplify their work.
- Expand and market Beth Am's post-Lab social justice advocacy and volunteerism experiences.
- Focus on obtaining grants to raise revenue specifically for social justice initiatives.
- Embed social justice concepts in board and committee work and events.

## Generate revenue to enable success and future stability

Beth Am has an obligation to its members now and in the future to become a financially stable and sustainable organization. Without a stable financial platform, Beth Am cannot offer the high quality programming that members have come to expect, nor can it engage the talented professional team of staff and clergy that make Beth Am the special place that it is. Beth Am runs a very efficient operation and while monitoring expenses will always be an important aspect of financial management, there is an opportunity now to explore new areas of revenue generation. Specific recommendations include:

- Strengthen fundraising efforts by creating a robust development committee to address all types of fundraising, including annual campaign, legacy/endowments, grants, and other revenue generating activities.
- Explore sponsorship and other innovative ways to encourage Beth Am members to give supplemental gifts. One example could be the creation of a “peoplehood” group that would serve the traditional functions of a brotherhood and sisterhood.
- Reinvigorate Beth Am’s culture of DIY volunteerism.
- Create an external marketing initiative targeting families with Lab-aged children, since a large percentage of new members come through Lab enrollment.
- Engage members with experience in grant writing to maximize opportunities for grants, particularly focused on social action and justice work.
- Gather the Space Use Task Force again and identify areas for rental income.

# Summary of All Task Force Recommendations

## Member Engagement and Lifelong Learning

**Vision:** We seek to engage every member of Beth Am in a meaningful way, to encourage a sense of belonging and rootedness, and to build a committed community around Jewish ideas and values.

1. ***Expand role of Membership Committee to include member recruitment, engagement, and care.*** Expand the role of the committee to include membership care and retention throughout the life cycle, including periodic check-ins and outreach during moments of significant joy and challenge. Represent diverse backgrounds across family structure, age, sexual orientation, levels of observance, Jews of color, Jews by choice, etc.
2. ***Embrace congregants with loving kindness and compassion as needed through a membership network that delivers support.*** Offer platforms (on/off line) to self-report needs to staff/congregants. Continue to engage members helping fellow congregants during the pandemic. Create a technological *Chesed Hub* that interfaces with membership software to report congregant needs and facilitate support. Track individuals who need support including those living alone; over 80; ill; or otherwise experience challenges. Provide resources to those who want to support other members. Build community among *Chesed* providers. Provide leadership training to current and potential leaders.
3. ***Introduce and integrate new adult and family members into the Jewish life of Beth Am in meaningful and fulfilling ways.*** Develop and implement a first-year experience designed to meaningfully engage new adult and family members into Jewish life within Beth Am, based on milestone experiences and core values such as social justice and community engagement. Identify key aspects of membership integration as identified by Beth Am staff, congregants and Conservative Movement best practices. Clarify the division of labor between committee members and staff for first year activities. Create a buddy system which pairs an existing Beth Am member with a new member.
4. ***Create a larger Lifelong Jewish Learning Committee with four foci and a structured planning/meeting process.*** Expand the committee to a chair, vice-chair, and two members who would set the calendar except time-sensitive opportunities, which would be brought to the chair and vice-chair at the Rabbi's discretion. Focus on 1) ongoing adult learning, 2) social events, 3) enrichment activities, and 4) time-sensitive opportunities. Establish a flexible calendar with opportunities for congregants to submit ideas for courses and events with various time commitments that occur in person, online, or a hybrid mix. Consider congregational interest, staff/volunteer capacity, and funding sources to identify opportunities for text and language study, Jewish culture/history, or current issues. Bring speakers to Beth Am and/or take congregants to events in the community and at other congregations. Partner with relevant organizations to reduce costs. Organize social and enrichment programs and opportunities for engagement in Baltimore and beyond through volunteer leadership.
5. ***Improve existing systems and establish new communication systems to facilitate congregant-led interactions in public and private spaces.*** Establish a searchable online

directory of Beth Am membership providing additional data (e.g. marital status, Jewish upbringing, race, sexual orientation) volunteered by individuals. Identify appropriate and affordable membership software and compare to that used by other faith organizations. Develop a process for entering and annually updating membership data (e.g. volunteers). Enable members to submit events through a “Meetup”-style forum and/or social networks. Establish a centralized directory for outreach groups and assign each a representative from both lay leadership and clergy. Establish a directory accessible by members for outreach and congregationally sanctioned groups that include both a lay leadership representative (e.g. committee chair) and a clergy representative (e.g. rabbi) for communication/coordination.

## Ritual and Prayer

**Vision:** Beth Am members and clergy will explore life’s journeys in the context of sacred community through Shabbat, Jewish holidays, and life cycle events. Shabbat services will inspire youth, families, and adults, including newcomers, people with different levels of knowledge, as well as members who now participate in and lead services. Beth Am will better connect High Holiday and Shabbat services and will find ways to balance consistency of content with occasional reimagining of services.

1. ***Encourage ritual participation by lowering barriers and increasing excitement.*** Identify barriers (especially for families) through surveys and focus groups. Provide resource materials for accessibility, and include non-disruptive alternatives to reading the service. Offer and advertise ‘special’ services that draw larger crowds and allow anonymous sporadic participation. Rotate between sanctuary and chapel. Increase youth participation in services and educational opportunities, focusing on creativity and leadership. Offer evening davening and promote radical experimentation when there is no ‘Beth Am way’.
2. ***Increase ritual and prayer educational opportunities.*** Offer virtual/online learning. Use existing resources supplemented with a Beth Am connection and other online resources that teach prayers’ meaning, and melody. Focus on explaining, adding depth and pldemystifying services. Increase education around home rituals.
3. ***Increase the repertoire of standard melodies and focus on the ability of music to engage people.*** Encourage participation, over time, to increase personal meaning. Facilitate newcomer comfort and (young adults leaving town) transition to other synagogues. Innovate slowly to build support. Incorporate variety with melodies from Weisgol, Beth Am, non-Ashkenazi, traditional and modern traditions. Introduce and name changes to offer opportunities to learn before general use. Reenvision role of the choir as a new cantor educator begins, with the goal of transitioning Shabbat choir placement from the front to among the congregation and have a confident core that meets regularly and is trained to ‘lead from the pews’. Encourage the choir and other enthusiastic singers to meet with the cantor to learn melodies and harmonies. Survey congregational needs and opinions. Make high holiday music more ‘singable’ and consider having choir lead from pews similar to Shabbat services.
4. ***Increase the bench of service leaders with the skills to lead shiva minyans and components of Shabbat and holiday services.*** Assess current skills and interest among lay membership. Identify opportunities for developing and showcasing teen leaders, including

training around shiva experience. Begin a Sunday morning minyan for skill building. Invite members (including teens) to read Torah/Haftorah on special anniversaries (e.g. B'nai Mitzvot) with support as needed and tied to low-barrier sponsorship of kiddush. Celebrate and honor volunteer leaders of ritual and prayer.

5. ***Increase youth participation in leadership during services.*** Have Ritual Committee connect with the Youth Education committee to identify goals of family/youth services and strategies for enhancing familiarity with services and build skills as service leaders. Encourage parents to participate in youth services and supplemental education in support of learning. Create weekday shacharit and Shabbat mincha minyan opportunities for youth service leadership during the week of B'nai Mitzvot.
6. ***Foster and facilitate participation in ritual experiences outside of prayer.*** Identify chevrei kadishe, mikvah, Rosh Chodesh, Shabbat dinners, etc. to share ritual practices and their meaning both collectively and virtually. Connect with the membership engagement committee to incorporate ritual celebrations into neighborhood based micro-communities.
7. ***Enhance meaning and impact of ritual and prayer in the Beth Am community.*** Create a template for planning around each holiday, Shabbat and home ritual. Maintain a sense of cohesive belonging while welcoming newcomers and periodic participants. Consider how cohesiveness itself may be a barrier for entry (e.g. viewed as cliquishness). Enhance Kiddush lunch through menu, volunteer engagement, and programming. Long-term, explore options for weekday downtown minyan with other egalitarian congregations. Offer weekday minyanim when possible (e.g. Fast of the First Born.)

## Leadership

**Vision:** Our volunteer leaders should feel cherished by their fellow lay leaders, communicated with (and where appropriate, consulted with) and, most importantly honored by our staff. They will bring with them both the authority of fiduciary oversight and governance but also a passion for Beth Am and a range of skills and perspectives that will make them essential collaborators with staff in furthering the holy work of our shul. Likewise, lay leaders will recognize the value of professional staff who serve and lead with unique training and experience in their respective roles, trusting them to thrive, grow and succeed in the areas to which the board of trustees holds them accountable.

1. **Develop comprehensive recommendations on governance and revision of the by-laws.** This effort should be transparent, with consideration of who should be involved in providing feedback and making recommendations. Considerations should include the process by which matters of policy are brought to the congregation or managed by the board and/or Rabbi. Create an organizational chart to clearly depict the relationships and interactions among all leadership groups as well as staff and clergy. Maintain the current structure of five officers. Clarify the expectation that the second vice president advances through the chairs to the presidency over a total of four years. Clarify authority, roles and interactions for daily operations among the president, vice presidents, the executive director, the executive committee, and the rabbi. Strengthen the president's role to include setting board meeting agendas. Clarify the job description, authority and reporting of the rabbi and executive director. The rabbi should report on major activities to the board. Balance leadership roles

between lay volunteers and the clergy. Streamline the Board of Trustees by reducing membership (but reflect congregational diversity) and decreasing meeting frequency. The board should make decisions and not be a 'rubber stamp'. Define a limited number of active standing committees (including Development, Membership, Adult Education, Social Action) with a board liaison and their functions and reporting expectations. Clarify how policies are developed, approved and published with a high degree of transparency. Revised by-laws should reflect underlying congregational values and set a tone for its vision.

2. ***Institute procedures to identify future congregational leaders.*** Solicit opportunities for leadership roles (committees, leadership positions, board roles) to the entire congregation annually by the board, recognizing that not all requests or nominations can be honored. Gather data on congregants' skills and interests including professional work, hobbies, and community involvement.
3. ***Strengthen leadership development efforts.*** Identify collaboration opportunities for leadership development with Na'aleh, the Center for Leadership of The Associated. Though the 2016 governance task force superbly stated the case for doing this at Beth Am, it is overly ambitious at this time unless a congregational leader were to organize it.
4. ***Strengthen the transparency of operations and encourage the engagement of congregants who can help address serious issues.*** Increase the frequency and modes of communicating congregational information in addition to the annual meeting, bulletins and other traditional means. Focus on issues that will help more members understand the challenges facing the congregation and inspire them to ameliorate them. Consider the extent to which additional transparency would be valuable while recognizing the private nature of certain information including human resources.

## Neighborhood Engagement and Social Justice

**Vision:** Beth Am will continue to explore as a congregation what Torah values of tikkun olam (repairing the world), chesed (lovingkindness), and tzedek (justice) require of us in the present. Beth Am fully integrates these values of social and relational justice through all aspects of our Synagogue community. From ritual and study to finance and governance, we demonstrate our commitment to advancing these values. Beth Am's historically Black and Jewish neighborhood in Central West Baltimore will continue to be a distinctive element of the Synagogue's mission and brand. Beth Am will engage with both the larger Baltimore Jewish community and faith communities in Central West Baltimore to put Torah values into action and advocate for social and relational justice. The roles of the Social Action Committee (SAC) and In, For, Of, Inc. (IFO) will be clearly defined and broadly understood by the congregation and its Central West Baltimore neighbors. SAC and IFO will have effective capacity, work collaboratively on issues of mutual interest, and maintain strong lines of communication.

1. ***Fully activate Beth Am as a synagogue community dedicated to social and relational justice.*** Conduct annual listening tours to understand congregation and neighborhood interests. Partner the Social Action Committee (SAC) and In, For, Of, Inc. (IFO) with the Membership Committee to systematically include prospects and new members. Synergize

programming with other synagogues. Offer low-barrier experiences in the neighborhood. Begin an annual tradition of reading social/relational justice book(s) introduced at High Holidays and amplified with ongoing programming and Kiddush lunch discussions. Review Beth Am practices and policies for consistency with the social and relational justice mission. Increase congregant and external philanthropy through coordinated SAC and IFO efforts and part-time staff capacity.

2. ***Align and effectively communicate the distinct yet complementary work of the SAC and IFO.*** Create a communications campaign to promote all Beth Am social and relational justice activities. Hold quarterly joint meetings of SAC and IFO to communicate and collaborate. Distribute meeting minutes to list-servs and the Beth Am Board. Finalize policy for Board, SAC and IFO to sign on to advocacy campaigns.
3. ***Nurture thick relationships with neighbors.*** Align expectations for Board and staff to social and relational justice values. Cultivate an asset-based view of neighbors and neighborhood organizations to develop partnerships that offer opportunities to work together for social justice and deepen mutual understanding. Promote community projects and events important for allyship. Become a pick-up location for Whitelock Farm orders. Connect congregants with Reservoir Hill history and present with the building centennial. Grow IFO leadership to re-include community representation.

## Youth and Family Education

**Vision:** We will connect and equip Jewish youth and their families to embrace and internalize their Judaism, engage in Jewish community, and evince Jewish values.

1. ***Grow Beth Am membership by advertising our high-quality youth education offerings.*** Develop a lay-led marketing task force to formulate a plan and produce content to grow Beth Am's youth programs. Highlight the renovated building and enhanced capacity to handle more students. Ensure the website easily navigates prospective families (and members) to enrollment forms that can be completed online. Incorporate parent testimonials.
2. ***Provide a high quality core youth education offering (K-6).*** Maintain the strong focus of the core Jewish Discovery Lab offering on Jewish identity and community. Provide well rounded education focusing on Jewish culture, history, holidays, prayer, Israel, and Hebrew language skills to strengthen Jewish identity and promote community and friendship. Strive to make children proud to be Jews, to internalize Jewish values and to nurture friendships and connection among Beth Am youth. Aim for progressive and spirited education that students will be truly excited to attend. Enhance the youth education committee with a chair (a Lab parent) and four total members including the director of education to provide ideas and feedback on Lab curriculum and special activities.
3. ***Expand adult member engagement with Beth Am's youth education programs.*** Grow a cadre of Beth Am member-volunteers to teach particular topics or rituals at the Jewish Discovery Lab. Encourage diverse topics including Beth Am's unique history, traditions, customs and ethos. Foster intergenerational connections across membership to improve the perception of Lab held by older members. Develop a Member Adjunct to Youth Education

committee with one chair (an adult that recruits other adults as adjunct educators) and five to eight total members that include the Director of Education. The committee will provide lessons to Lab students and internally market Lab to the wider Beth Am community.

4. **Expand holiday-based family education outside the walls of the synagogue.** Leverage the membership of Beth Am families to execute holiday-based social programming outside the synagogue. Organize Shabbat dinners, Sukkah hops or decorating parties, Chanukah events, Tu B'Shvat/Lab B'Omer hikes or outings and more. Include family-focused education through age-appropriate information that hosts share with guests. Help with educating on, preserving, and transmitting holiday-specific customs. Develop curricula and organizational capacity to identify hosts and advertise opportunities for connection. Enlist a Volunteer Coordinator to market events and make matches between hosts and guests.
5. **Focus the post-Lab educational opportunities.** Expand the Advocacy Club into a full-fledged youth program to attract non-members and engage youth in 7th-12th grades. Incorporate lay membership expertise and interest. Meet weekly. Market the program to attract families and youth seeking meaningful Jewish values-inspired engagement post B'nai Mitzvah. Incorporate societal issues that the congregation is working on collectively. Study Jewish texts to learn historical responses. Champion the program through the Social Action Committee so this can be the youth outreach and/or research component of that committee. Provide value through volunteering and/or advocacy credentials for high school requirements or college admissions. This can be co-educational for speakers available to broader membership.

## Financial Sustainability

**Vision:** Beth Am will strive for financial sustainability and flexibility in support of its mission, programs, operations and facilities, now and as may be amended in the future, by using a diverse and robust set of strategies.

1. **Strengthen the synagogue's fundraising approach.** Consolidate fundraising efforts into a "Development Committee" with a 5-10 year timeline mapping all initiatives. Hire a development staff member. Cultivate major donors, new members and the overall congregation through a coordinated, sophisticated and sustainable program that activates Beth Am milestones for specific campaigns. Leverage 'rewards' to incentivize giving and year-on-year increases. Create a planned giving campaign. Institute suggested giving amounts as part of the billing process for the Annual Fund. Find event sponsorships. Create a donor category that commits a fixed annual donation for a fixed number of years in exchange for omission from solicitations.
2. **Consider developing an active "grants" initiative.** Conduct cost/benefit analysis. Identify incubation grants that become self-sustaining. Create a grant application plan with oversight and authorization processes. Cultivate available grant writers.
3. **Reinvigorate Beth Am's culture of DIY volunteerism by mobilizing and centralizing social and activity related revenue generation.** Promote gender-neutral versions of the

traditional Brotherhood/Sisterhood with formalized organizational structure and policies to take on fundraising events with available seed money and congregational skills. Extend membership beyond congregants as engagement is value in and of itself. Create an online store. Offer ways to participate in fundraising in lieu of donating.

4. ***Revise the dues structure bearing in mind the symbiotic relationship between dues and Annual Giving.*** Examine the appropriateness of a progressive style dues structure with an abatement policy that includes an alternate scale for those in need to improve consistency and reduce discomfort. Encourage younger prospects (under 40) to join Beth Am through reduced dues or scaled based on child/ren age(s). Test a dues increase for members 40+ and a ‘welcome rate’ for first year membership. Restructure High Holiday seat fee(s) based on familial relationships of members. Include a structured, entry level capital contribution as part of membership joining fee. Market the value of membership while promulgating revamped dues structure. Analyze membership turnover and new member growth in relation to change in dues.
  
5. ***Optimize the newly renovated space to engage with our internal/external communities and to generate new net income.*** Reconvene the Space Use Task Force to reconsider recommendations based on actual renovations. Develop rental related goals, consider a contractor for booking, and build rental schedules reflecting Beth Am’s established needs. Reassess fee structure based on current market conditions and ensure it does not bar access to Reservoir Hill neighbors. Maintain membership value with a price difference for members. Develop a marketing plan including a brochure and online presence.

## Prioritization

The results of the Strategic Planning Committee’s prioritization for each of the recommendations provided by the Task Forces are shown in Table 1. Strengthening fundraising and leadership development received the most votes. Effectively marketing youth programs and fully activating Beth Am to social justice received the second most number of votes. Expanding the role of the Membership Committee, providing high quality K6 programming, and identifying new leaders were all also highly ranked.

**Table 1. Prioritization of each Task Force recommendation**

<b>Recommendation</b>	<b>Task Force</b>	<b># Votes</b>
Strengthen fundraising	Financial Sustainability	13
Strengthen leadership development	Leadership	13
Effectively market youth programs	Youth & Family Education	9
Fully activate Beth Am to social justice	Social Justice	9
Expand role of Membership Committee	Member Engagement	8
High quality K6 programming	Youth & Family Education	7
Identify new leaders	Leadership	7

Integrate new members into Jewish life of Beth Am in meaningful ways	Member Engagement	6
Embrace congregants with lovingkindness and compassion	Member Engagement	5
Centralize program revenue generation	Financial Sustainability	5
Review governance structure and by-laws	Leadership	5
Expand lifelong Jewish learning committee	Member Engagement	4
Expand holiday based family education	Youth and Family	4
Focus on post-Lab education	Youth and Family	4
Align Social Action Committee and In/For/Of	Social Justice	4
Generate rental income	Financial Sustainability	4
Foster opportunities not centered on prayer	Ritual and Prayer	4
Lower barriers to participation	Ritual and Prayer	3
Increase bench of service leaders	Ritual and Prayer	3
Develop grants initiative	Financial Sustainability	3

## Implementing the Strategic Plan

Strategic planning charts a course for Beth Am’s officers, clergy, professional staff, members and volunteers to follow to live our mission, vision, and values over the next 3-5 years. Implementing the strategic plan has several key steps:

1. **Board Approves “Beth Am Strategic Plan 2021 (5781)”:** Beth Am’s Board of Trustees is the owner of the strategic plan and is accountable for its implementation. By voting to approve the strategic plan developed for the Board by the Strategic Planning Committee, the Board ratifies the content and assumes implementation responsibility.
2. **Board Creates an Implementation Task Force:** Beth Am’s Board of Trustees must assemble the resources to implement the strategic plan. The first step to doing so is to identify a Chair and a Co-Chair for the Implementation Task Force, pairing where possible a seasoned leader with a rising one. The Chairs should then assemble a task force which may include members of the Strategic Planning Committee (or its Task Forces), members of the Board’s standing or ad hoc committees, clergy and/or professional staff, and volunteers from across the membership who are inspired and motivated to implement the Strategic Plan’s recommendations. The Implementation Task Force will be responsible for implementing the Strategic Plan and will be required to report back to the Board on a routine basis the status of ongoing implementation activities, the schedule of planned/upcoming implementation activities, and risks/issues encountered during the course of implementing the recommendations of the Strategic Plan. The Board should provide regular updates to the congregation on what will be implemented this year and, periodically, the implementation successes achieved during implementation.

3. **Mission/Vision Task Force Reconvenes:** Task Force uses the adopted vision to evaluate the existing Mission and develop a concise and memorable Vision statement summary.
4. **Implementation Task Force Creates Implementation Plan:** To begin work, the Implementation Task Force will review the recommendations of the Strategic Plan and lay out a time-phased approach to implementation, pulling together into a time-phased view the short-term, medium-term, and long-term recommendations identified by the Task Forces. Based on these time horizons, the Implementation Task Force will assemble a one-year implementation plan and present it to the Board, assuming responsibility for the Board to implement these initiatives within the one-year timeframe. In years 2 through 5, the process will be repeated until the Implementation Task Force has implemented five successive one-year plans and completed implementing the recommendations of the Strategic Plan.

# Appendices

## [Fact Book](#)

The strategic planning process launched in the Spring/Summer of 2019. The Data Team's charge was to produce by the end of summer the following deliverables: 1) a populated [SWOT table](#) for further consideration by the Strategic Planning Committee (SPC); 2) a list of "actionable" issues that could lead to the formation of Task Forces; and 3) a report that includes, among other things, the previously mentioned deliverables.

During this period, the Data Team relied upon various surveys, group discussions, interviews and collections of internal and external data to develop its report to the Strategic Planning Committee (SPC). Much of this information was created within a time period that encompassed our diaspora from the synagogue building, the transition of a new administrative team and the conversion of our historical financial/membership information system. **Thus, the Team believes its data findings and absence of historical information must be viewed within the context of how this stressful period might have influenced, and thereby skewed, member responses and limited our production of potentially relevant historical data.**

## [Task Force Reports](#)

The Associated: Jewish Federation of Baltimore's ["2020 Community Study – Foundation of Our Future: Portrait of Jewish Baltimore"](#)