



**Congregation Agudat Achim**

# STRATEGIC PLAN

for the years 2022-26

*Revision date: March 21, 2022*

Dear Friends,

Shortly after Rabbi Spitzer became our spiritual leader, we began to discuss the need for a Strategic Plan to carry our congregation into the next five to ten years. In the fall of 2019, we begin the holy work of planning for the future of Congregation Agudat Achim.

Through the work of many, we were able to create 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 Steve Schmidt, Kathy Englehardt and Sharon Watkins-Fox 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 read the executive summary and review the statement of values and goals and the five core strategies. And we hope you'll consider helping our committees maintain and advance the work of Congregation Agudat Achim.

May we go from strength to strength, and may the work of so many enable our congregation to thrive for years to come.

Jackie Rowen  
President

# Executive Summary

The strategic plan task force began work in December 2019. It held a series of community outreach events, surveyed the congregation, met with the Board, and gathered information from synagogue records. Working with Aimee Close of USCJ, it identified four priority areas, and formed working groups to examine those areas. From the reports of those groups, it produced a set of recommendations which it organized into five core strategies.

Those five core strategies will implement the synagogue's vision for the next five years: to be a vibrant and dynamic community that shares in the fullness of life together. It will develop our leadership, build enthusiastic participation in services and programs, strengthen our membership, and make our community a place that draws people in and connects them to us and to one another.

The five core strategies are:

1. Build A Connected Community
2. Increase Jewish Engagement
3. Develop Community Leadership
4. Improve Communications and Transparency
5. Prepare for the Far Future

There are nineteen recommendations for how the congregation can implement these five strategies in the coming five years, divided into three levels of priority.

We encourage all members of the Agudat Achim community to read the full plan and to find ways to help implement the core strategies and realize the vision for the future of the synagogue.

## Table of Contents

I. How We Got Here: The Strategic Planning Process	5
II. Where We Stand Now: Our Vision and Our Goals	7
III. What We Should Do: Our Five Core Strategies	9
1. Build A Connected Community	9
2. Increase Jewish Engagement	12
3. Develop Community Leadership	14
4. Improve Communications and Transparency	16
5. Prepare for the Far Future	18
IV: Where We Will Go: Achieving Our Mission, Fulfilling Our Vision	20

# I. How We Got Here: Our Strategic Planning Process

In November 2019, Jackie Rowen, the president of the synagogue, organized the strategic planning task force. The task force held its initial meeting in December of that year. The task force organized a series of events to reach out to the community and obtain its thoughts about the direction the synagogue should take in the next five years. These events included a series of focus group meetings and town halls where individual members could express their views. The task force conducted a survey of the congregation with questions asking about what the synagogue did particularly effectively and how the synagogue could improve to be more effective in the future. The task force also reviewed the synagogue's financial documents and the self-study done in 2018 during the search to hire a new rabbi. Last, the task force reached out to USCJ for assistance in preparing a strategic plan, working with Aimee Close, one of USCJ's strategic planning consultants, and completed a congregational assessment provided by USCJ.

In March 2020, the beginning of the COVID pandemic imposed a halt on the activities of the strategic planning that lasted until August, when the task force conducted an analysis of the synagogue's strengths, weaknesses, opportunities, and threats as preparation for beginning a discussion of goals that the synagogue should aim to achieve in the coming five years. In October, the task force met with the board of trustees for a wide-ranging discussion of the synagogue's vision and priorities. Following that meeting, the task force identified four areas of highest priority for the synagogue's growth in the coming five years; those areas were Leadership and Governance, Ritual and Prayer, Membership Engagement, and Volunteerism. The task force organized four working groups, one for each of those four areas. Each working group included one or more members of the task force as well as five to seven other members of the congregation who had particular interests and/or experience in that area. The working group members were chosen to be representative of the community in several ways include age, gender, and interests. Every task force included at least one member of the board of trustees.

The working groups began their discussions in February 2021 and produced their reports in April. In May 2021, the task force met to discuss the working group reports and integrated their findings into a set of prioritized recommendations to be the basis for the strategic plan. In July, the task force met to organize the writing of the final plan, which was done during the remainder of the summer and early fall. The first full draft of the plan was circulated for discussion in March 2022 and was (will be) approved by the Board of Trustees on April DATE, 2022.

The thanks of the entire community are due to the members of the strategic planning task force, the members of the working groups that studied each of the four priority areas, and to all of the Agudat Achim congregants who contributed their time, thoughts, and suggestions for the consideration of the task force and the working groups. The members of the strategic planning task force and the four working groups were:

## Members of the Strategic Planning Task Force

Josh Cooper-Ginsburg (through December 2021)  
Jeff Handelman  
Kati Illouz (through March 2020)  
Anita Merims  
Jackie Rowen  
Henry Skoburn  
Rabbi Rafi Spitzer  
Ann Zonderman  
Kathy Englehardt, co-chair (through October 2020)  
Sharon Watkins-Fox (member throughout, co-chair after October 2020)  
Steve Schmidt, co-chair

## Members of the working groups

### ***Membership Engagement:***

Jill Bucinell  
Kathy Englehardt  
Randy Fox  
Laurie Goldstein  
Gary Reich  
Esta Skoburn  
Rebecca Stashower  
Ann Zonderman  
Henry Skoburn, co-chair  
Sharon Watkins-Fox, co-chair

### ***Leadership and Governance:***

Hillary Fink  
Mery Gross  
Dan Mayer  
Barbara Miller  
Allan Pearlman  
Jeff Handelman, co-chair  
Jackie Rowen, co-chair

### ***Ritual and Prayer:***

Murray Jaros  
Alyssa Kahn-Ehrlich  
Adrienne Klein  
Joseph Shiang  
Kaitlin Spektor  
Bob Weissberg  
Art Friedson, co-chair  
Rabbi Rafi Spitzer, co-chair

### ***Volunteerism:***

Lynne Bower  
Ross Garmil  
Andy Gavens  
Mindy Rowen Sorbo  
Sharon Wohl  
Josh Cooper-Ginsburg, co-chair  
Anita Merims, co-chair

Of course, the synagogue did not come to a standstill while these groups were hard at work. Many of the suggestions that were made to the strategic planning task force and the working groups were implemented during the process of producing the strategic plan. Among these were the formation of the Social Action committee, and much work that it has done since forming; the design and launch of a new synagogue website, and the implementation of alternative styles of worship on Saturday mornings. We thank the many members of the congregation who worked on these initiatives, and we hope that their work will be a foundation on which further implementation of the strategic plan can be based.

## II. Where We Stand Now: Our Vision and Our Goals

The vision that guides this strategic plan covers the next five years; as our experiences during the Covid pandemic have taught us, we ground it as much in realistic self-assessment as in our lofty hopes.

Congregation Agudat Achim is a vibrant and dynamic community that shares in the fullness of life together. We strive to create pathways for our community to connect to the wisdom and traditions of Judaism to live a meaningful life and shape a just world.

When we describe ourselves as vibrant, some words which come to mind are loud, intergenerational, diverse, and musical. When we describe ourselves as dynamic, we mean warm, welcoming, responsive, and creative. The fullness of life includes births, first steps, achievements, milestones, Torah study, coming out, illness and healing, divorce, transition, learning to drive, engagement, marriage, death, mourning, as well as reentry after a pandemic surge. Ultimately, we believe that our Jewish traditions are valuable because they help us to live meaningful lives for ourselves, and to create a more just world for all of us, including future generations.

With love and acceptance toward all, regardless of relationship or family arrangement, income, or Jewish background, CAA will shine throughout the Capital Region as a place where every member feels known and recognized for who they are. We embrace the diversity of needs and perspectives of our community members with the utmost respect. Across generations, we share in learning (Torah), searching for the sacred (*avodah*), and engaging in acts of caring and healing (*gemilut chasadim*) to create wholeness, fulfillment, and peace (*shalom*) for ourselves, our community, Israel, and our world.

These are our goals for the coming five years:

Our leadership will reflect our vision of lay and professional leadership aligned and moving in the same direction, dynamic and evolving, with the tools, resources, and abilities to meet current and future challenges. Leaders want to lead, members want to be engaged, and staff want to work. Leaders will be willing to take risks because they feel supported, and board meetings will address serious issues, and have a spiritual component to inspire our leaders.

We will have enthusiastic participation in services filled with song and spirit, which represent different styles and ways to connect with the Divine that meet the spiritual needs of all congregants. Those who lead our services will share a passion for improvement, a sense of striving, and an intentionality toward the project of connecting spiritually that can be shared. Each of us will stretch our zone of comfort to respect the needs of our fellow daveners of all generations and backgrounds, including children, visitors, and members of our community of other faiths or no faith. Our ritual lives outside of prayer and the synagogue building will respond to the call of the tradition, fulfill the mitzvot, and provide our members individually and collectively with a sense of meaning and satisfaction.

Our membership will be made up of a wide range of ages, various family structures, and a blend of socio-economic status, while celebrating gender, cultural, and ethnic diversity who learn, play, eat, give, and serve together. We will engage with everyone, where they are and as they are. We will celebrate

and grow through learning opportunities for all ages that are built on Jewish values from *torah sh'bichtav* (written Torah) and *torah sh'b'al peh* (oral and inherited rabbinic traditions), and will emphasize the importance of acts of *Hesed*/love and *Tzedek*/justice in the world.

Our community will be a place that people want to invest their time and energy, a place where people are drawn to, and desire to connect. Volunteers and leaders will come from all groups within the community; they will make the synagogue a priority and will be committed to its success. Our volunteer leaders feel cherished by their fellow lay leaders, communicated with (and where appropriate consulted with) and honored by our staff. Lay leaders 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.

The core strategies of this plan will move us toward these goals.



# III. What We Should Do: Our Five Core Strategies

This strategic plan calls for Congregation Agudat Achim to commit to five core strategies during the next five years. Each of these core strategies includes between two and six recommendations for carrying out that strategy across the synagogue's operations, and each of the recommendations has one or more suggested specific actions that the Board and/or executive leadership might implement to carry out the recommendation. The actions are only suggestions meant to offer some specifics about the intention of the recommendation; they need not be taken if the Board and the leadership think other actions would carry out the strategy and its recommendations more effectively. In some cases, more details about the suggested actions are available in the individual working group reports.

The five core strategies are:

1. Build A Connected Community
2. Increase Jewish Engagement
3. Develop Community Leadership
4. Improve Communications and Transparency
5. Prepare for the Far Future

Among the nineteen recommendations included in these core strategies, priorities should be:

- Higher group of priorities (not in any order): 1A, 1B, 2A, 3A, 3B
- Middle group of priorities: 1C, 2B, 2C, 3C, 4A, 4C, 5A
- Lower group of priorities (but still priorities): 1D, 2D, 3D, 3E, 3F, 4B, 5B

## ***1. Build A Connected Community***

The congregation should strive to build a sense of community in which all members, and all potential new members, are able to build personal connections to other members, to the congregation as a whole, and to the Capital District Jewish community. We need to provide opportunities for people to get to know each other and to regularly interact with one another, building friendships and a sense of shared purpose. We will have succeeded in carrying out this strategy if we see increased participation in our events, programs, and services by a broad group of members, and if we strengthen our identity as members of our community, the Jewish community of Schenectady and the Capital District.

The four recommendations for building a connected community are:

### **1A. Build connections between individual members**

The congregation should find ways to help members, both new and existing, meet people with similar interests and develop activities to do together. This will help members become more closely engaged

with the synagogue and improve member retention. Below are six suggested actions to implement this recommendation:

- Introduce all new members to one or more existing members with similar interests and/or similar demographics. This helps all new members meet someone with whom they are likely to have common ground, who can advise them on programs, activities, and committees, and starts integrating them into the community. The membership committee might do this, with support from the professional staff, and a program could be started within a few months.
- Make available nametags for all congregants to wear at services and programs. Because of Shabbat requirements, the nametags would have to be pre-written; members would pick their nametags from a rack and return them at the end of the event. The office has the names; we would have to devise a means of producing the nametags, putting them out for distribution at services and events, and returning them to storage afterwards. This could be done fairly quickly but requires an ongoing commitment to keeping the nametags current and available.
- Encourage new congregants to start activities and groups. This would be done by reaching out to them to let them know that this is welcomed; they would need to be connected to committee chairs who could support their proposed groups and activities with funding and experienced volunteers to assist with organization. This would take a few months to organize and regular effort to sustain.
- Take steps such as surveys or focus groups to understand the demographics of our congregation, know our congregants personally, and understand why they are willing to invest time, energies, and significant money into the congregation. Also complete a comprehensive personal/family interview (needs assessment) when new members join. This interview will lead to an understanding of what will keep that person/family engaged in synagogue life. This would require an ongoing commitment from executive leadership and the membership committee to acquire the information and make it available to committees in a useful format.
- Celebrate and socialize with food. Ensure that activities are combined, where possible, with opportunities for people to connect informally before or after the activity, and provide food and drink to encourage participation. Examples are kiddush after services, the Hebrew school parents' coffee klatch, congregational dinners. Individual events are relatively easy to organize, but providing them on a regular basis requires both money and volunteer effort, both from Catering and from others.
- Establish chavurot. The Federation recently ran a program encouraging the formation of chavurot across the broader Jewish community, and we could join that program or offer a modified version of it ourselves. It could also be done more informally by reaching out to specific congregants known to have particular interests and encourage them to organize events around their own interests. This would take some months to organize, how many depending on how formally the organization was done.

### **1B. Focus on inclusion**

The Jewish population of the Capital District, as elsewhere, is increasingly diverse. The percentage of the population that is intermarried is rising. Both of these trends will continue for some time. In order to maintain and increase membership, the congregation must be welcoming and inclusive of Jews of all

colors, identities, and backgrounds. Below are four suggested actions to implement this recommendation:

- Maintain inclusive language and policies towards LGBTQ+, BIPOC, and people with disabilities. Many of our future members will be drawn from these groups. We need to ensure that our community is inclusive and comfortable for them, both by stating this as our condition in places that are publicly visible, by maintaining appropriate policies, by ensuring that members of these groups are treated appropriately and fully integrated into the community and its leadership. A review of policies and promotional materials can be undertaken in the next few months; ensuring full integration will be an ongoing effort.
- Create opportunities for non-Jewish participation in synagogue activities. We can find ways to recognize non-Jews who are participating in our services while maintaining halakhic standards. The religious school can develop opportunities for non-Jewish children of members to participate with their Jewish classmates.
- Review our policies affecting interfaith families to make sure they are as inclusive as they can be while maintaining appropriate ritual distinctions. A committee to do this could conduct a review and work with standing committees to implement changes within a year. The membership committee could review our recruiting materials and modify them to address issues relevant to interfaith couples, which could also be done within one year's time.
- Participate in USCJ interfaith programming. The USCJ has taken an active interest in the issue of interfaith engagement and from time-to-time offers programs or workshops on the subject for lay leaders and clergy. The time commitment and horizon depend on USCJ offerings.

### **1C. Create comfortable space for socializing**

People will naturally make connections with one another if they are brought together in places and times where they have opportunities to do so. The congregation should provide a variety of such places and times and actively encourage new and existing members to participate. Below are two suggested actions to implement this recommendation:

- Create "meet-and-greet" events where members meet who didn't know each other before; some of these could be hosted at synagogue, some at individual congregants' homes, some at public social spaces. This would require some scheduling and funding, and would take a few months to organize.
- Help new members get connected to ongoing activities. We could have an in-person event where the various committees tabled about their activities and opportunities. We can also communicate opportunities with posts on the website and a dedicated space in the weekly announcements. This would require an evening for the event and time from committee chairs to prepare for the event and provide communications.

### **1D. Transform ritual spaces and practices to make prayer more accessible and inclusive**

Jewish ritual and prayer are what define us as a synagogue, distinct from other community organizations that people may join. We want to make it as easy as possible for all congregants, regardless of background or other interests, to be able to engage with ritual and prayer since these are the things that, in our area, only we offer. Below are four suggested actions to implement this recommendation:

- Use alternative configurations of our space to make services less frontal and more participatory, so that services become more interactive and less passive. Make sure that it is easy for people with different physical abilities to take honors and participate in services.
- Make services more accessible online so that people can participate remotely even when the pandemic has passed. Install more cameras to enable different configurations of our sanctuary while still being accessible to the livestream audience.
- Host regular (monthly or bi-weekly) intergenerational and/or children’s services in which children and young families take active roles in leading parts of the service, such as pre-Shabbat interactive children’s services with songs and movement which would lead into Friday night service - even something outdoors during the warm weather months. Also incorporate “Grandparent/grandchildren Shabbat” to highlight intergenerational connections at services.
- Recruit new people to lead services so that there is a broader range of service leaders that offer congregants a range of styles of leadership and more chances for personal connection to service leaders.

## **2. Increase Jewish Engagement**

The congregation should ensure that all congregants are able to play an active role in the religious and spiritual life of the community in ways of their choosing. Congregants at all levels of Jewish knowledge will be engaged with the prayers they are saying and will feel empowered to say them. The congregation should make different styles of services will be available to meet the spiritual needs of all congregants and should encourage congregants to make Jewish ritual a part of their daily lives. We will have succeeded in carrying out this strategy if an increased number of congregants become engaged leaders of and participants in ritual, prayer, and Jewish life, both in the synagogue and in their personal lives.

The four recommendations for increasing Jewish engagement are:

### **2A. Identify the spiritual needs and desires of congregants**

We need to know what our congregants are seeking in order to provide services and programs that will effectively meet their needs. The suggested action to implement this recommendation is:

- Create focus groups and conduct surveys to lean more deeply into what our congregants actually want from ritual and prayer. The ritual committee and rabbi can do this. In 3-6 months we can organize the surveys and conduct initial focus groups. There will have to be longer term follow-up to respond to what we learn, and the surveys and focus groups should be conducted at regular intervals (every 3-5 years) to ensure that our programming tracks the evolving needs of our congregants.

### **2B. Provide a range of creative services**

There are many different approaches to ritual and prayer in the Jewish tradition, some of which resonate more strongly for particular people than others. To help our ritual and prayer be meaningful in the lives of all our congregants, and to appeal to different age cohorts and demographic groups, we must offer a variety of different types of ritual experiments, to create as many connection points as we

can to help people explore their own ritual lives. Below are two suggested actions to implement this recommendation:

- Create opportunities for prayer connection in other modalities than scripted davening, such as Jewish meditation, prayer through movement, chant, niggunim, study as prayer, spontaneous prayer, and others. These can be introduced into existing services, with consultation with Rabbi and the ritual committee, and might happen in 3-6 months.
- Support ritual activities beyond traditional prayer services, including drum circles, dance, creative writing, ritual formation and innovation, immersion in mikveh, study of prayer, healing circles, and more. These activities will take longer to organize and develop but some can be undertaken in a one to two year time frame, or sooner if a congregant interest group appears.

## **2C. Provide opportunities for social action**

Social action gives members of all ages and backgrounds opportunities to be physically and monetarily involved in helping our local and global communities, both the Jewish community and the broader community. Tikkun olam can be an avenue to draw in Jews who may find it harder to engage with other aspects of the synagogue. These events and programs will also foster a sense of community within our congregation. The suggested action to implement this recommendation is:

- Create opportunities for local and global activities and programs for members of all ages and backgrounds. Opportunities should be available in the synagogue, at a site, and from home. The Social Action committee should establish a regular series of programs, and resources to do this should be available when needed. This will take one to two years to get fully established.

## **2D. Enhance services with music**

Music elevates the soul. Our services should do more of that, and so we want to make sure our services are full of music, new and familiar, that can help elevate our souls. If we think creatively we can find ways to incorporate music into our services that are consistent with our understanding of the *halakhah* of musical instruments. Below are four suggested actions to implement this recommendation:

- Recruit a group of people who are willing to learn new tunes outside of formal prayer so that when they are introduced in prayer there are already people who know them. The recruiting can be done in the next 3-6 months; progress thereafter will depend on how many people participate and their availability.
- Bring in a student cantor once or twice a year, or hire a music professional part-time for a year, using the funds available for that purpose in the restricted funds. This requires someone to identify and invite a cantor, to organize that cantor's appearance which may include both services and concerts or classes outside of services, and to publicize events to the congregation. Or if a professional is hired, it requires finding and recruiting such a person and funding a salary for the position.
- Use instrumentation where halakhically acceptable and desired by the congregation. The primary challenge here is to recruit someone with the requisite musical skills who is willing to commit the time to learn music and regularly perform it.
- Record our familiar tunes and make them accessible on our website so new members can learn them; add new tunes to our repertoire, and update that web page periodically, encouraging

members to learn new tunes from the website as they are introduced in services. This requires some time to identify new tunes and record them, and connect them with service leaders who want to introduce them.

### **3. Develop Community Leadership**

The congregation should ensure that members are able and willing to take on leadership roles to organize and support the many activities that our community provides to our members. New members must be integrated into groups that put on services, activities, and events; members of those groups must be prepared to take on leadership of those groups as opportunities open; and members must be prepared to serve in positions on the Board and in the executive leadership to ensure that our resources are used effectively and wisely. We will have succeeded in carrying out this strategy if we are able to fully staff leadership positions, committees operate more effectively, and we have identified potential new leaders to replace those currently serving when the time comes.

The six recommendations for developing community leadership are:

#### **3A. Motivate congregants to volunteer for activities they find purposeful**

The congregation has a long history of a culture in which members who join are accepted and embraced for their willingness to volunteer for and participate fully in the congregation's activities and services. While many of the congregation's members are interested in volunteering in general, they do not always have a specific activity in mind. Executive leadership and committee chairs need to engage with new and existing members and help them find activities that will be meaningful to them, to bring more volunteers into our committees. Below are three suggested actions to implement this recommendation:

- Create and develop a "Volunteer Play Book" that would give committee chairs recommended contacts and procedures to ensure that new volunteers were integrated into activities and appropriately acknowledged for their efforts. This would take about six months for a group of experienced committee chairs to assemble best-practices recommendations.
- Implement periodic surveys to determine changing wants, needs, and interests of congregants, including open-ended questions of what types of activities people would like to participate in and whether they would be willing to volunteer to make it happen. This would require creating a survey instrument and updating and administering it once every few years.
- Join forces with other groups from the wider community to create joint volunteer opportunities/programs that meet the needs of our congregants beyond the scope of CAA alone. This is already underway but will require one to two years to identify and implement a wide range of relationships within the community.

#### **3B. Develop a pipeline of future community leaders**

It has become increasingly difficult to find members to take on leadership roles as people who have held those roles for a long time step down from them. The congregation needs to identify and develop newer members who can step into these roles as they come open. Below are two suggested actions to implement this recommendation:

- Committee chairs should identify members of their committees, especially newer ones, who could serve as chairs of the committees in the future. They should provide those members with training and information that would help them develop the skills necessary to eventually take on the role of chair.
- When possible, committees should be co-chaired, so that when one of the co-chairs steps down, the co-chair can provide continuity while identifying and supporting a new co-chairs who can grow into the chair's role.

### **3C. Train Board members to operate effectively**

The community needs a Board that can ensure that lay and professional leadership is aligned and moving in the same direction, and whose dynamic, evolving leadership has the tools, resources, and abilities to meet current and future challenges. The Board will need to operate efficiently and effectively to bring this about. Below are four suggested actions to implement this recommendation:

- Have the board attend a training program such as USCJ's Sulam leadership training program or Federation board training programs. This would take lead time to arrange and a commitment from the Board to attend and to implement what they learn.
- There should be a Board retreat/orientation session where the Board members spend some time learning how to function as a team and what the synagogue's current issues are. This would require a commitment of time by the Board to participate and would also require some effort and funds to organize a structured retreat.
- There should be a Board handbook that explains to Board members the role of the Board in synagogue government, in particular how it interacts with committee chairs, Executive Committee, and professional staff. This would require assembling a committee to produce the handbook and secure agreement from all stakeholders on its contents. It would require perhaps three to six months to do this.
- New Board members should be mentored by existing Board members to help them become effective Board members quickly. This can be done for the new Board members starting in September, and requires commitment from existing members to mentor.

### **3D. Build pride in volunteers**

We need volunteers to feel appreciated for the work they do, in order to encourage them to continue their volunteer efforts and expand them. We also need stronger connections between volunteers and leaders to help develop future leaders and encourage volunteers to step up to these roles. The suggested action to implement this recommendation is:

- Board members, officers, and committee chairs should set an example from the top down by regularly attending services, programs, and events, to let volunteers know that their work is valued and appreciated. This requires time commitment from attendees.

### **3E. Recognize the efforts of our volunteers**

Volunteers do work for an organization because they enjoy what they do and find it meaningful. We can enhance both of these by effectively recognizing the contributions of our volunteers, developing a sense of value for the work they do, both for leaders and for the volunteers themselves. Below are three suggested actions to implement this recommendation:

- Institute follow-up procedures for all synagogue events, asking volunteers to determine effectiveness of the program to which they contributed and how we can improve their experience developing the next event. This requires executive leadership to provide the procedures and event organizers to implement them, which will take three or four months.
- During certain events that can often be first experiences for new members (e.g., grounds cleanup, first in series of events) provide opportunities for new volunteers to be introduced to congregants and feel welcomed prior to beginning tasks. Label volunteer accomplishments as possible during events. This can be done quickly by event organizers.
- Routinely assess cost-benefit ratio that volunteers provide to our congregation. This can be done by event organizers but will require some training which will take three or four months to develop.

### **3F. Reform our committee structure to be more efficient**

We need committees to function efficiently so that the time spent on those meetings produces as many high-quality events as possible. Some of our committees don't have enough members to function well, and some committees may have been created to serve needs that the community no longer has. We should reorganize our committee structure to allow each committee to fulfill its functions without using more volunteer time than necessary. Below are three suggested actions to implement this recommendation:

- Make sure that each committee has a well-defined function and has sufficient members to carry out that function. Where committees have overlapping functions and/or too few members, merge committees to produce larger, more effective committees. This would require the executive committee to work with all committee chairs to define their roles and to produce changes as necessary, which may involve amending the constitution. It would take about six months to do this.
- Survey the talents, skills and interests of members in order to identify potential new committee members, to help get more members for committees which don't have enough. This would require perhaps three months, and should probably be done only after reorganization of committees is done.
- New committee members should be mentored by existing member to help integrate them into the work of the committee. This requires commitment from existing members to provide mentoring and can be done quickly.

## ***4. Improve Communications and Transparency***

The congregation should ensure clearer communications at all levels of the organization, and make sure that congregants, volunteers, committee chairs, Board members, executive leadership, and professional staff all understand what is happening across the organization, what decisions are being made, and why. Clear communications and transparency will make it easier for congregants to approach leaders, ask questions and express views, and help the organization function more effectively. It will also make congregants more comfortable in stepping up to leadership positions, as they will feel more welcome in those positions and better able to anticipate what will be involved in taking them on. We will have



succeeded in carrying out this strategy if members feel better informed about what the Board is doing, what directions the Board is taking the synagogue, and the reasons for doing so.

The three recommendations for improving communications and transparency are:

#### **4A. Improve Board accessibility and transparency**

The Board needs to set the direction of the synagogue; that direction needs to be based on input from staff and committee chairs, who need to know the Board's intentions so that they can be implemented. Below are three suggested actions for this recommendation:

- Livestream Board meetings, or make them available on Zoom, so that congregants can more easily follow the Board's actions. This would require setting up technology to allow the Board to be on the Internet during its meetings, which would require adapting equipment or purchasing more. It would take a few months if existing equipment could be adapted; longer if more had to be purchased, plus the cost of the purchase.
- Make Board minutes and financial documents readily available to the congregation, probably via the synagogue website. This can be done in the next month and requires executive leadership to make documents available for posting.
- Communicate through a monthly newsletter, including a Board Doings columns and highlighting synagogue projects, or through weekly Constant Contact emails. This requires ongoing leadership effort to provide content.

#### **4B. Help volunteers understand expectations**

Volunteers need to clearly understand what is expected of them if they are to select volunteer opportunities that they will find rewarding and have a good experience. This requires the congregation to make clear information about the expectations that go with the various volunteer positions. Below are two suggested actions to implement this recommendation:

- Create and circulate job descriptions for all volunteer opportunities, keeping them as simple and consistent as possible. It would take three to six months, and some time from each committee chair, to draw up a complete list of opportunities and describe them.
- Create and publicize language on the expectation that members will volunteer for the organization; there are benefits to members of service volunteering, it helps define our identity as a volunteer-driven congregation, and it helps minimize dues by reducing the need for paid labor. This can be done quickly and deployed as opportunities arise.

#### **4C. Upgrade communication technology**

As technology changes, old ways of delivering programs and communicating information to members become less effective as new members, younger ones especially, expect to engage and receive information through newer technologies. The congregation needs to respond by using those technologies to push content to our members. The suggested action to implement this recommendation is:

- Establish a Technology Team charged with determining what Agudat Achim wants to do with technology three to five years forward. The Tech Team would look at needs and wants, benefits and detriments, and be the catalyst for congregational support. This action will require

organizing a committee, some months of work by that committee, and a budget, possibly a fairly large one, to procure new technology to carry out its recommendations.

## ***5. Prepare for the Far Future***

While the congregation must devote effort to dealing with today's challenges, the congregation should not lose sight of the very long run future of the congregation, and be sure that it provides today the things that will ensure the viability of the congregation for the next twenty-five to fifty years. Ultimately we can be successful only if we are able to continue attracting new members to the organization, and have financial stability to allow the congregation to continue meeting their evolving needs. We will succeed in implementing this strategy if we are able to maintain a steady membership level, or better yet, increase our membership, and if we build the financial reserves to ensure that we can continue an appropriate level of expenditures to fund the congregation's ongoing activities.

The two recommendations for preparing for the far future are:

### **5A. Strengthen our youth and family education programming**

Like many Conservative congregations, we have an aging membership. Engaging new members at the lower end of the age profile is critical, and programming for children and families is our primary means of doing so. We need to ensure that we attract families with young children and, to the extent possible, we draw both children and parents into the life of the synagogue as well as that of the Hebrew school. The more young families we can attract, the easier it will be to continue attracting new ones. Below are six suggested actions for implementing this recommendation:

- We should extend our programming for families - parents and kids of all ages. This includes both events that are designed to engage both parents and children, and programs that run in parallel and engage each group separately. We need to support families engaging in our programs with things like playgroups, learning pods, toy swaps, babysitting, meal trains, and other things that will help them meet their needs through us. This will be an ongoing commitment requiring effort from both volunteers and staff, and a regular budget commitment as well.
- We should have programs that encourage families to meet one another, to help them make social connections that will build community in this age range. Some of these, like the coffee klatch, may appeal to parents only; others may connect whole families. These will require programming commitment from volunteers and staff and small amounts of funds.
- We should revise the religious school curriculum to increase its level of challenge and engagement, to help children and parents find greater Jewish meaning in the school. There should be layers of meaning and relevance, with instruction paced flexibly. It should address the relevance of Torah to life today, active Jewish life and celebration, opening minds to the community and the world outside the classroom, and focus on preparation for meaningful bar and bat mitzvah experiences in sixth and seventh grades. The Hebrew high school should offer educational and fun classes at times that work best for the teen audience. This will take a year or more to organize and will require considerable effort from professional staff, teachers, and volunteers.

- We should create a teen social space, as we used to have, that will encourage teenagers to remain active at the synagogue building after b'nai mitzvah. This will be useful during various types of programming for other age groups as well as supporting USY. This requires committing some space and probably some time and budget for decoration and otherwise adapting the space to teen social use.
- We should create physical and social space for children during services. This means both age-appropriate programming such as Junior Congregation, K-2 services, and Tot Shabbat, as well as making the main service a comfortable place for children and parents to be together, and having a child-friendly space where parents can take children while still having connection to see and hear the service. These will require substantial volunteer commitment to provide child services, a commitment to maintain a child-friendly atmosphere in services, and dedicating room and some technology for the child-friendly space.
- We should promote our students mixing and meeting students in synagogues in the Capital District through social action volunteerism and other joint interests, forging broader Jewish identity and connections among peers.

## **5B. Grow the endowment**

To thrive in the future, we need long term financial stability, allowing us to shift focus away from finances and towards services, programs, and events that provide Jewish engagement and meet congregant needs. This will come from having a large and growing financial endowment which will reduce our dependence on membership dues, which may not be sustainable in the long run, and provide funds for essential programming. Below are two suggested actions for implementing this recommendation:

- Revitalize the Akiva campaign, encouraging congregants to include bequests to the congregation in their wills. This requires professional staff and executive leadership to raise awareness of our needs and volunteers to help coordinate bequests with synagogue needs.
- Partner with Federation's Life and Legacy campaign, or similar programs, that allow us to draw on Federation's capacity for fundraising. This requires coordination with Federation and whatever may be asked of us in exchange for their assistance.

## **IV. Where We Will Go: Achieving Our Mission, Fulfilling Our Vision**

Congregation Agudat Achim aims to be a House of Prayer, a House of Study, a House of Gathering, and a Sacred Community. We hope that these five core strategies will help the leaders of our congregation – the Board, the officers, and the chairs and members of the various committees – make our vision for the next five years a reality and build a stronger Jewish community.

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