

I. Introduction

- A. The purpose of strategic planning, in its most basic form, is to assist us in making choices that impact how well we achieve our vision and mission. It provides structure to keep us on task, and direction when solving dilemmas. Our work builds upon the challenges and successes of our previous plan which guided us through very significant changes in how this congregation saw itself internally, in our communities, and in what we collectively believed we could and should accomplish.

Our new plan, presented below, will take us through the next phase of our evolution. In a structured approach, it details measurable outcomes, assigns accountability, and details required resources. It compels us to envision this institution three years from now, having accomplished ambitious goals to create more of what we need and want, make corrections where needed, and draw us ever closer to achieving our vision--an ideal state of faith, learning and justice.

B. Sections

1. Board governance
2. Jewish Learning & Practice
3. Operations - [non-financial] capacity building
4. Finance - capacity building

II. Who We Are

- A. Vision Statement: Beth Israel Congregation is the center of Reform Jewish life in Mid Coast Maine by providing community and Jewish practice. We realize the ideals of Torah, Tikkun Olam, Gemilut Hasadim, and Tzedakah and ensure a safe haven for all expressions of Judaism.
- B. Mission Statement: Beth Israel Congregation of Mid Coast Maine provides a progressive, inclusive center for worship, learning, culture and engagement that connects us to Judaism, social justice, Tikkun Olam and to one another.

C. Values

1. Beth Israel is a welcoming and inclusive Jewish congregation for people of all ages, races, religious and ethnic backgrounds, abilities, sexual orientations, and gender identities.
2. We are committed to studying Torah, to maintaining our sacred traditions, and to embracing diversity of Jewish thought, expression, and practice.
3. We provide engaging educational experiences for our children, youth, and adults to inspire Jewish spiritual and intellectual growth across the generations.
4. We engage in ongoing service to the larger community. Tikkun Olam and Social Justice are important to us.

5. We celebrate, grow, grieve and heal together through the seasons of life with mutual respect and shared responsibility.

III. What We'll Do [Goals]

A. Board Governance:

1. Develop and maintain the institutional, administrative and financial resources that will allow the Congregation to carry out the Strategic Plan and strengthen our foundation for the future
 - a) Goals:
 - Bylaws fully reviewed and updated as needed and approved by Board and membership
 - Use the Strategic Plan adopted by the Board to guide and focus decisions
 - Develop a backup/support plan for the treasurer as well as a succession plan
 - b) Who will be responsible: Governance Committee, Finance Committee
 - c) Resources needed: Time, leadership
2. Ensure strong lay and professional leadership who advance the Congregation's mission and carry out the Strategic Plan.
 - a) Goals:
 - Establish a leadership committee which will:
 - Determine how the rabbi's energies, talents and commitments are focused including a time audit
 - Determine the areas on which we want the rabbi to focus
 - Determine how to develop leadership for the areas in which the rabbi is not focused
 - Develop needs assessment tool for human resources
 - Cultivate new leadership and resources
 - Maintain an ad hoc Covid Response Team to determine best practice for each aspect of congregational life
 - b) Who will be responsible: Governance Committee, Finance Committee, Rabbi, Board
 - c) Resources needed: Time, leadership

B. Jewish Learning & Practice

1. Youth Religious School
 - a) Goals:
 - Approval of 2021-2022 curriculum by parents and teachers
 - Hebrew language focus
 - Judaics (holiday, Bible, culture)
 - Family Education Option - families to learn together , to “ do” Jewish together in the community (continued virtual learning for accessibility)
 - Engaging B'nai Mitzvot families with collaborative service projects, learning together throughout study year

- Post B'nai Mitzvah programming with other congregations, Bowdoin students, CSTJL, mutual support among state wide Jewish communities
 - Hebrew School: Remain online more with 1:1 tutoring and practice
 - Create pipeline of Bowdoin students/volunteers to assist with instruction and curriculum planning
 - Focus on making Judaic learning more robust in building vocabulary and language through movement and music
 - Track current/ anticipated enrollment in Hebrew School and relationship to current/ future staffing needs
- b) Who will be responsible: Rabbi/Education Director, Education Committee
- c) Resources needed: adequate funding, personnel, parental involvement

2. Lifelong Learning

- a) Goals:
- Increase ongoing program offerings in partnership with URJ, JCA and other synagogues in Maine. Classes might include:
 - Adult b'nai mitzvah
 - Intro to Judaism
 - Weekly lay-led small group Torah study
 - Jewish spirituality
 - The Prophets
 - Focus on one book of Tanakh
 - Israeli poetry
 - Modern Hebrew
 - Prayer fluency
 - Torah Hebrew
 - Provide single classes on various topics including
 - Holidays
 - Topics in Jewish life
 - Expand Lay leadership of Adult Ed opportunities
- b) Who will be responsible: Leadership Committee, Education Committee, Rabbi
- c) Resources needed: curricula, books, supplies, media, building.

3. Worship, Shabbat, Holidays

- a) Goals
- Chai Committee development: Increase membership and leadership within committee by establishing a cohort of 4-5 consistent members
 - Consistently connect with Rabbi on developing plan for events

- Meet every 4-6 weeks for planning
 - Continue to set calendar with major dates and times a year in advance
 - Organize a bench of volunteers for events with specific dates and times
 - Arrange a system of volunteers to provide the onegs
 - Integrate music and musical accompaniment in more worship services
 - Increase family and youth opportunities - 3x a year preschool Shabbat, every holiday has a family component
 - Encourage an increase in attendance of worship service
 - Decide about purchasing the Reform High Holiday prayer book
 - Continue to deepen the relationship with Bowdoin by sharing events
 - Institute a “Guest” speaker program
 - Institute Yearly Shabbaton
 - Continue sharing programs with other congregations
 - Establish a shared meal event after Shabbat morning services 2-3 times a year
 - Design worship services which meet a variety of spiritual needs
 - Plan for post pandemic balance of in-person and virtual opportunities for worship and learning
- b) Who will be responsible: leaders, participants:
- c) Resources needed: Funds

C. Outreach & Inclusion

1. Social Action: Our efforts are focused on being a force for good through inclusion and taking congregational actions for social justice. We strengthen our sense of community by engaging members in social justice learning and action activities.
 - a. Goals:
 - Create a Steering Committee whose task is the design and implementation of congregational opportunities which take meaningful steps towards promoting social justice in our local community. Having been previously identified by our congregation as priorities, we envision our work in the next three years as focusing on three issue areas
 - racial justice
 - food insecurity and hunger prevention
 - healing the environment.
 - With input from consultants, the Steering Committee will generate potential Beth Israel-sponsored educational events and activities aimed at promoting social justice in the three focus areas. This group will identify

areas where Actions can be taken and organize a subgroup to identify at least 1 action per year to enact which will have a meaningful impact in one of our three issue areas.

- Populate a calendar for the year with activities such as speakers, films, discussion groups and specific actions. Develop further action steps for promoting Beth Israel's involvement in Social Action activities based on feedback from the participants.
 - Engage a broad and diverse group of congregants in participation in social justice work. Increase by 15% each year.
 - Hold a year end forum where the learning is synthesized, actions are planned and feedback is elicited
- b. Who will be responsible: Rabbi with the Steering Committee
- c. Resources needed: Yearly calendar of planned events, budgeted funds to pay guest presenters/ speakers, Zoom account, communications tools (FB, website, e-blast, newsletter)

2. Community Care By providing care in times of need we create a sense of community

- a. Goals:
- Maintain and support the work of the Sunshine Committee in reaching out with loving care to our community. The current Sunshine Committee was convened in July 2020. The group's mission and goals are contained in [this document](#).
 - Grow the leadership and strengthen this committee by adding two members (one per year)
 - Revisit “Zugot” (Partnering) pilot project and refine according to needs of participants especially post pandemic
 - Develop ways to evaluate how current strategies are working to meet the needs of the community
 - Work together with the Social Action Steering Committee to find ways to encourage Community engagement
 - Review previous Strategic Plan (2015-2018) for goals that should be revisited as worthy of inclusion.
- b. Who will be responsible: Sunshine Committee members, Rabbi and other volunteers as needed
- c. Resources needed: Time, leadership

3. Inclusion

- a. Goals:
- With the help of the Rabbi and the Audacious Hospitality tool from URJ assemble a cohort who will identify the inclusion needs in the

BI community and develop events and activities which will serve those needs

- Develop an assessment tool for our ADA compliance and a plan to get to as full as possible to complete compliance in both buildings.
 - Assess disability inclusion in other areas, not just access to our buildings but other ways in which we can make inclusion and access available to all. (hearing, vision, and any other)
- b. Who will be responsible: Rabbi, Board of Directors, Education Committee
- c. Resources needed: Time, leadership

D. Operations

1. Capital Improvements

a. Goals:

Minnie Brown:

- continue work on renovations of MBC to be done in phases as costs are expected to exceed the \$350,000 currently approved

Synagogue

- Projects costing < \$500 undertaken without Board approval
- Train greeters and other volunteers at synagogue events on operating the lift
- Repave the driveway
- Improve lighting in the balcony
- Improve and maintain the grounds
- Perform needs assessment on HVAC for building with view to installing heat pumps especially for cooling
- Make cosmetic updates to front lobby
- Install additional memorial plaque board in sanctuary

b. Who will be responsible: Design Committee, Building Committee

c. Resources needed: money, Board approval, security consultant/vendor, contractors, costs, project management

2. Communications: Technology and Social Media (Various communication channels will be used to support the following: recruitment of new members, timely information and reporting of upcoming events, past events, useful sources of information)

a. Goals

- Determine areas of strength and weakness in our communication with the congregation as a whole and various subgroups through surveys and other means
- Determine sustainability and effectiveness of each platform used

- Develop a clear understanding of security risks within each communication platform in order to establish practices which minimize that risk
 - Explore the pros and cons of Instagram as a platform that may enhance communication in ways that other platforms do not
 - Expand use of hybrid technology in broadcasting in-person and remote services
 - b. Who will be responsible: Director of Communications, Website manager, Rabbi, President of the Board and others
 - c. Resources needed: Analytics from various platforms (Squarespace, Mailchimp, Facebook, congregational surveys via Google forms), time, continued allowance in the budget for Communications director and subscription fees for various platforms.
3. Building Operations: Facilities Maintenance
- a. Goals:
 - Investigate feasibility of hiring a paid maintenance person to be retained for various tasks such as alarm issues, small repairs, opening and closing for various events, recycling and composting
 - b. Who will be responsible: Building Committee, Board, Treasurer
 - c. Resources needed: Sufficient funds, leadership
4. Building Operations- Sustainability and Security
- a. Goals:
 - Investigate design and installation of a secondary exit from the synagogue sanctuary from back of the building; install based on feasibility
 - Replace synagogue front doors with a more secure alternative
 - Risk assessment is ongoing with Bath PD and/or Sagadahoc County
 - ongoing training is provided to congregation as needed
 - Lines of communication are in place with local PD and other law enforcement; process in place to keep up with ADL alert; information shared with greater Maine Jewish community about level of threat
 - b. Who will be responsible: President, Security Committee, Rabbi
 - c. Resources needed: Sufficient funds, leadership

E. Finance

1. Budgeting

- a. Goals:

- Maintain current practice of making accommodations for people who have difficulty paying
 - Create a process for reviewing and evaluating dues adjustment up or down.
 - Review pricing for memorial plaques in the Synagogue building.
 - Determine when we will need a paid part time support person for treasurer tasks/ personnel tasks/ dues arrangements. IRS, Dept of Labor, Social Security.
- b. Who will be responsible: Treasurer and finance committee
- c. Resources needed: Time, leadership

2. Investments

- a. Goals
- Review and Develop investment goals
 - Plan on how to distribute earnings
 - How much cash v. other assets
- b. Who will be responsible: Treasurer, Finance Committee, Board
- c. Resources needed: Time, leadership

3. Fund raising

- a. Goals:
- Develop a plan for completing pledges from those who have not
 - Create a plan to promote legacy gifts (planned giving)
 - Follow up with pledges made to actual contributions and find appropriate time of year to initiate this.
 - Determine if additional fundraising is necessary for the improvement of Minnie Brown
 - Connect additional fundraising with the 100 year party
 - Continue to research and apply for available Grants for the building (Sam L Cohen, Pew, FEMA, national historic registry)
 - Hold Celebration event for the newly renovated Minnie Brown connected with fundraising.
- b. Who will be responsible: Treasurer, Finance Committee, Board
- c. Resources needed: Time, leadership

IV. Keeping it Going

- A. Plan for ongoing review
1. Annualized goals & milestones for each section
- B. End of plan closeout
1. Year 3 evaluation & recommendations for next plan
 - a) What to mark as completed, what to continue, what to let go of, new initiatives to recommend
- C. New plan development/transition
1. Measurable goals
 2. Responsible parties

3. Resources needed

Beth Israel Board of Directors, May 2021

Peggy Brown, President
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Karen Filler, Treasurer
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