

Kahal B'raira Strategic Direction Review Summary

March 4, 2009

by Philip Katz

In the fall of 2008, the KB Executive Committee (EC) decided to review the congregation's 2006 Strategic Direction, which can be found on-line at www.kahalbraira.org/committees/sig/summitReport.pdf. The goals of the EC were to:

- a. Review the progress of our Strategic Direction initiatives
- b. Explore new initiatives
- c. Prioritize these initiatives for implementation by the congregation

On October 28, 2008, the EC took these steps:

1. Approved a strategic direction status report, which can be found on-line at www.kahalbraira.org/committees/sig/StrategicDirectionStatus.pdf.
2. Added several new initiatives.
3. Grouped the initiative into four categories.
4. Created a Review Committee, consisting of Jerry Rubin, David Zarowin, Gladys Maged and Phil Katz.

The EC invited the congregation to a meeting on January 25, 2009, to help realize the goals of the review. At this meeting, the 26 members (including almost all the EC members) in attendance:

1. Reviewed the strategic direction status report.
2. Added several new initiatives.
3. Broke down into groups to prioritize the initiatives in each category.
4. From the top two priorities of each category, prioritized the initiatives
5. Ate lunch and sang a song

This meeting produced 8 recommendations, ranging from strong to moderate to weak. (A description of the process used at the January 25, 2009, meeting can be found on-line at www.kahalbraira.org/committees/sig/PrioritySettingProcess.pdf.) A common theme throughout this meeting was that the initiatives are related to and/or dependent on many others, so no one initiative stands on its own. All initiatives, old and new, completed or not, are summarized in chart on the next page, with the first 8 being those recommended by the congregation on January 25, 2009.

In addition to these recommendations, the following ideas were generated and put into a "parking lot/suggestion box" for further consideration: Web presence/Facebook; Improve "discussion period"; Youth Group; 8th Grade Class; Revisit 15 meetings per year; sell a new type of membership – Holiday membership which includes high holidays, Chanukah and Passover and costs \$250 (this could be for outsiders or we could revamp Friends of KB and take away restrictions and merge the two categories); pair up with assisted living centers; get work study co-ops, as is due to all non-profits; develop social singles events for young adults.

I would like to thank the members of the Review Committee (Jerry Rubin, David Zarowin, and Gladys Maged) for their help in both content and process in reviewing KB's Strategic Direction. We now leave it in the hands of the Executive Committee for implementation.

Initiatives from 2006 Strategic Direction and 2009 Strategic Direction Review

<u>Initiative</u>	<u>Status</u>	<u>Recommendation</u>
1. Improve Outreach Efforts	The Outreach Committee has improved their work since 2006	Strong recommendation to do more, with emphasis on hiring a marketing consultant to help, especially to get advice on what groups are worth targeting; investigate membership categories (such as young adult, elders, "friends"); perhaps doing more work on college campuses.
2. Create a service book	Not done	Strong recommendation to do this, especially in relation to KB library materials.
3. Improve retention efforts	New initiative	Strong recommendation to do this, with an emphasis on: the youth group; an 8 th grade; strengthening community building (e.g. structured schmooze).
4. Hire more paid staff	We have increased administrator and hired administrative assistant and music leader.	Moderate recommendation to continue, with emphasis on: leadership development; turning administrator into Exec. Director w/ authority & more hours; create a formal process for quality control; paying staff more to retain of good people. It was previously discussed to pay madrakim and Judaica consultants when needed.
5. Fund-raising and/or increase dues	Much has been raised since 2006. Continual fund-raising is now a part of our SOP.	Moderate recommendation for more of the same.

<u>Initiative</u>	<u>Status</u>	<u>Recommendation</u>
6. Train and Support committee chairs	All-Chairs meetings have been well developed with good agendas and useful training materials, but haven't been well attended. EC members are no longer designated to be committee liaisons, although EC is encouraging committee chairs to attend EC meetings, but response is inconsistent.	Moderate recommendation to continue this work, with an emphasis on: the introductory meeting; good documentation; and learning to get people to volunteer. Realize that this will make KB work well, show new members we are a good place and retain members through community building.
7. Expand adult programming	New initiative.	Weak recommendation, possibly to also target some programming toward young adults.
8. Better allocate volunteer resources	Has happened somewhat.	Weak recommendation to continue this work, with an emphasis on: assessing needs with respect to people and time; moving people and/or limit sign-up; having better and more frequent committee meetings during Sunday.
9. Hold volunteer appreciation night	Not done, but we've been acknowledging volunteers in print and on Sundays.	No new recommendation.
10. Extend officers terms to 2 years	Not done.	No new recommendation.
11. Develop leadership capacity	Done a bit through other initiatives	No new recommendation. Continue this through other initiatives
12. Expand Membership categories	"Friend of KB" membership has been in place since 9/2005.	No new recommendation, except what may come out of Outreach initiative.
13. Hold Open Houses	We have had an open house each year since 5/2005.	No new recommendation. Continue this work, incorporate into SOP, starting with scheduling them when making annual KB calendar.
14. Communicate about ourselves to other faiths	New initiative.	No new recommendation.
15. Finish creation of policy and procedure handbooks	Slowly happening in some committees.	No new recommendation.

<u>Initiative</u>	<u>Status</u>	<u>Recommendation</u>
16. Find a permanent home	Found a new temporary home with flexible use, office space, and storage.	No recommendation for further work.
17. Coordinate and experiment with Sunday meeting structure	The committees planning Sunday mornings have been experimenting somewhat with alternate structures.	No recommendation
18. Improve facilities and equipment coordination	Done, especially in our new home.	Not discussed
19. Establish quality control process	New Initiative	No recommendation.
20. Re-establish interfaith focus group	It was established, made some recommendations, created an alternative “structured schmooze” for a while.	No recommendation beyond that it should be revived
21. Clarify KB’s identity	Done ad hoc.	No recommendation beyond that it should be revisited.
22. Launch young adult programming	New Initiative	No recommendation.
23. Develop KB library	New Initiative, but have one already.	No recommendation.
24. Improve membership committee procedures	Five protocols have been developed. Some have been followed more than others.	No new recommendation, but that committee continues to strive for improvement in implementation
25. Add two Sundays to our schedule.	Completed, with some resistance. One day has become an all-congregation day.	Not discussed.