



TEMPLE BETH ISRAEL

Center for Jewish Life in Eugene, Oregon

TBI FIVE YEAR PLAN 2024

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INTRODUCTION

In early 2024, the TBI Board of Directors appointed an ad-hoc committee to develop and submit a robust 2024 Five-Year Plan for its approval. The plan is intended to set priorities for development and implementation to nurture and build the TBI community over the next five years.

The committee is chaired by board officer Caitlin Roberts. Committee members are Rabbi Ruhi Sophia Motzkin Rubenstein, current board members Kelly Menachemson, Reisa Maddex, and Stefan Ostrach, past board member Bruce Kreitzberg and congregation members Gabe Tabak and Katharine Gallagher.

TBI has a diverse membership with many needs and interests. Ideally, the 2024 Five-Year Plan will be a living document which can provide guidance and also be refined or adjusted as needs change. To be effective, It should be widely referenced and consistently used in all areas in which the TBI community is engaged. The Board, or its designee, is strongly encouraged to review it annually to ensure continued alignment with existing priorities.

VISION AND MISSION STATEMENT

Temple Beth Israel is a center for Jewish life embracing traditional wisdom with contemporary insight. We promote the spiritual, educational, and social well-being of our members, the Jewish people of Lane County, and the larger community.

PROCESS

Since February, the committee met several times (Feb 15, Mar 13, April 3, April 25, May 16, May 30, and June 23rd). During and between meetings, committee members, individually and as a group, thoroughly reviewed, discussed and incorporated the following materials into the 2024 Five-Year Plan:

- 2016 Five-Year Plan
- 2022-2023 Jewish Federation of Greater Portland's Lane County Supplement
- 2023 Strategic Development Ad-hoc Committee Report
- 2024 Board Retreat notes and data

The 2024 Five-Year Plan reflects and responds to feedback from the TBI community which was broadly solicited and received in the following ways:

- Seven one-on-one staff interviews
- Questionnaire (65 responses)
- Two town halls (in person and virtual)
- Member feedback following May 2024 Congregational meeting
- Board feedback on the draft version of the plan at the June 2024 meeting

STRUCTURE

The 2024 Five-Year Plan is organized across five pillars:

1. Belonging
2. Learning
3. Stewardship
4. Leadership
5. Social Action

Each pillar has a rationale and contains specific goals with related strategies for the period 2024 through 2029. Committee members have the experience and insight to offer specific, initial guidance for implementing many (not all) strategies. For this reason and where relevant, this information is labeled "implementation" and captured under the

related strategy. Implementation actions are strong recommendations, not hard and fast directives. They are subject to the availability of resources; both of people to help, and of needed funding.

PILLAR 1: BELONGING

Pillar 1 Rationale: A central tenet of Reconstructionism is “belonging.” TBI strives to be a warm and inviting community that treats each other with respect ensuring that TBI is a welcoming space for people of all genders, sexual orientations, races, ethnicities, disabilities, and socio-economic statuses. In order to succeed, we must be intentional in how we foster community.

GOAL 1.A: To be a warm, welcoming community.

Strategy 1.A.1 Re-establish the Membership committee to facilitate a warm welcome for new members and to interface with TBI staff for the onboarding process.

IMPLEMENTATION: Membership committee welcomes and communicates with new members about their interests and known volunteer opportunities within the TBI community. Based on new member interest, make introductions and facilitate connections with people in the TBI community (individuals, affinity groups, programming, etc). Have a system in place to check in with new members throughout their first year at TBI.

IMPLEMENTATION: Whichever TBI staff member inputs new-member onboarding paperwork should reach out to the chairs of committees of interest to alert them to the new member’s interest. The chair should then, within the next month, reach out to the new member to welcome them and give them an overview of the committee. Should programming or meetings be imminent, the new member should be invited to attend.

IMPLEMENTATION: Board members call or write personal notes to welcome new TBI members. Assign each board member one month of the year. Provide board members with new members’ contact info for their month. Board members are encouraged to take additional steps such as making a coffee date or a social introduction to another TBI community member.

Strategy 1.A.2 Continue to provide a wide array of services of varying lengths that meet the needs of our community.

GOAL 1.B: To have an engaged community of members regularly putting together and attending events at/or sponsored by TBI.

Strategy 1.B.1 Create a fun annual event where committees gather (such as club tabling events in high school and college) to educate community members about what each committee does and to invite participation.

IMPLEMENTATION: Each committee is responsible for following up with those interested in joining and incorporating them into committee work.

Strategy 1.B.2 Create regular, convenient opportunities for a cross-section of community members to share a casual meal at TBI.

IMPLEMENTATION: Schedule meals for Wednesday nights after Talmud Torah, holidays, Shabbat and/or havdalah when folks and families are especially receptive to the idea of having a pre-planned dinner option.

IMPLEMENTATION: Consider potluck, paid, sponsored, and combination meal formats.

IMPLEMENTATION: Track attendance to gauge interest across demographics and gather information on needed adjustments to attract a cross section of membership.

Strategy 1.B.3 Consider and address the ways in which gender, sexual orientation, race, ethnicity, disability, and socio-economic status may create barriers to joining TBI and participating fully as a member.

IMPLEMENTATION: Continue to support and encourage affinity groups such as the Queer Chavurah who may experience barriers to full participation in our community

IMPLEMENTATION: Promote the community's understanding of Our Shared Commitment as a model for removing financial barriers to membership while also encouraging generosity; each household privately determines what a meaningful commitment is for them on an annual basis.

IMPLEMENTATION: Explore right-sizing childcare offerings as a way to better serve the community including, for example, free childcare for adult-oriented activities at TBI.

GOAL 1.C: To be a community that fosters a culture of respect and appreciation, especially when difficult topics arise, so that members are free to explore their own thinking and to understand the thinking of other members.

Strategy 1.C.1 Create spaces and opportunities to explore connecting across difference, including but not limited to Jewish lived experience, beliefs, values, and preferences as they relate to the diaspora, Israel, and the world.

Strategy 1.C.2 Pro-actively promote and safeguard community cohesion.

IMPLEMENTATION: Use established best practice to encourage dialogue, an exchange of ideas, and healthy disagreement. Consider format, size, and setting. Ensure facilitators are prepared and capable.

IMPLEMENTATION: Review and make widely accessible TBI's policies for respectful communication and dispute resolution.

PILLAR 2: LEARNING

Pillar 2 Rationale: TBI is a place for Jewish learning and education for all members. In light of its diverse membership, TBI strives to provide relevant Jewish-focused learning and educational programming reflective of and sensitive to a variety of ages, family composition, religious beliefs and practices as well as cultural traditions.

GOAL 2.A: To be the community's center for multi-generational, diverse, and robust life-long Jewish learning with at least 50% of member households regularly engaged in learning.

Strategy 2.A.1 Offer an array of text-based, religious, and ritual practice classes providing weekly opportunities to learn in community.

IMPLEMENTATION: Determine if the youth education position will be expanded to the director of lifelong learning, or if adult education will be met through another staffing position

IMPLEMENTATION: Re-define, reconstitute, and invigorate the Community Education Committee

Strategy 2.A.2 Expand offerings around Jewish cultural learning (cooking, crafting, music, etc).

Strategy 2.A.3 Expand secular, academic, and life cycle offerings.

Strategy 2.A.4 Explore including embodied practices (dance, yoga, and the outdoors) into the above learning opportunities.

Strategy 2.A.5 Incorporate a focus on Israel into the above learning opportunities.

GOAL 2B: The Preschool will continue to adapt to the needs of TBI's membership including serving as a feeder for TBI membership and as a bridge to the wider community.

Strategy 2.B.1 Conduct ongoing assessment of the needs of the Jewish community and adapt preschool offerings to meet those needs.

Strategy 2.B.2 Ensure the preschool is meeting the highest standards in early education.

Strategy 2.B.3 Ensure that preschool families are wrapped into the greater TBI community

GOAL 2C: To invest in and have a thriving, integrated, and well supported Talmud Torah program.

Strategy 2.C.1 Continue to cover at least half the cost of running the program.

Strategy 2.C.2 Review the current schedule and structure of the Talmud Torah program relative to effectiveness and efficiency, identifying opportunities for improvement and refinement, in order to ensure desired impact and relevance.

GOAL 2D: To offer attractive, engaging programming which seamlessly bridges life-cycle transitions.

Strategy 2.D.1 Consult with the Preschool advisory committee, Preschool director, and other stakeholders to explore the potential for baby groups, playgroups, and parent-oriented groups.

Strategy 2.D.2 Assess the need for and interest in post b'nai mitzvah programming for teens as well as for parents with children aging out of Talmud Torah.

PILLAR 3: STEWARDSHIP

Pillar 3 Rationale: Maintaining and enhancing our programming requires responsible financial planning. TBI's current funding struggles to support programming, rabbinic staffing, administration, Talmud Torah, and building operations. To successfully plan for the future, additional revenue must be secured and/or proposed expenditures restructured.

GOAL 3.A: To meaningfully increase TBI's financial capacity in order to remain financially stable in light of rising costs, including wages.

Strategy 3.A.1 Continue to dialogue with and educate members and prospects about the importance of TBI's Our Shared Commitment dues model for long-term financial wellbeing.

IMPLEMENTATION: Ensure communication about Our Shared Commitment emphasizes its inclusive approach in that members are provided a framework for personally determining what their annual contribution will be.

IMPLEMENTATION: Assess membership understanding of TBI budget priorities and existing gaps. Address gaps in understanding.

Strategy 3.A.2 Increase TBI membership and other revenue streams.

IMPLEMENTATION: Consult the *2022-2023 Jewish Federation of Greater Portland's Lane County Supplement*, a study conducted through Brandeis University, when developing outreach strategies to increase membership.

IMPLEMENTATION: Consistently and clearly communicate across all programs with prospects who frequently engage with TBI about the importance of becoming a member.

IMPLEMENTATION: Identify ways to collect prospects' information at high-capacity events and create a follow-up communication strategy

IMPLEMENTATION: Explore and develop revenue streams including advertising, charging for high-value events, rentals, and expanded childcare offerings (infant and/or afterschool).

Strategy 3.A.3 Consider using existing available income.

IMPLEMENTATION: Task the finance committee with developing guidelines and making recommendations to the Board regarding use of endowment income (not principal).

IMPLEMENTATION: Consider using bequests to pay off the mortgage, freeing up resources for programming, operations, and building maintenance.

Strategy 3.A.4 Implement a reasonable and ambitious development plan to significantly increase financial capacity over the next five years.

IMPLEMENTATION: Cultivate and honor large donors.

IMPLEMENTATION: Increase member and supporter-participation in Life & Legacy giving.

IMPLEMENTATION: Explore funding through grants and community corporate sponsorships.

IMPLEMENTATION: Explore and attempt a variety of fundraising events beyond the annual auction.

GOAL 3.B: To have a beautiful well-maintained and well-utilized physical space in line with the community's needs.

Strategy 3.B.1 Conduct a "20 year building and campus checkup."

IMPLEMENTATION: Develop a schedule and payment plan for repairs and maintenance.

IMPLEMENTATION: Increase annual allocation of funds to the Building Repair and Replacement Reserve Fund.

Strategy 3.B.2 Continue moving TBI towards being more sustainable.

IMPLEMENTATION: Conduct an evaluation of decarbonizing the building.

IMPLEMENTATION: Explore, and if feasible, install solar panels

Strategy 3.B.3 Ensure the physical space continues to adapt to meet the community's needs.

IMPLEMENTATION: Explore, and if feasible, create a mikvah on TBI campus

IMPLEMENTATION: Explore bringing in groups that can use TBI's space during underutilized hours or periods of time.

PILLAR 4: LEADERSHIP

Pillar 4 Rational: TBI has a strong history of volunteer leadership. TBI is responsible for establishing and maintaining structures to support current leaders and nurture new leaders, to ensure the best use of staff and resources, to avoid staff and volunteer burn out, and to continually adapt to changing needs.

GOAL 4.A: To have strong, well-supported leaders at all levels of TBI who reflect TBI membership diversity and have a clear understanding of their role, including expectations for their position.

Strategy 4.A.1 TBI will further develop Board of Trustees recruitment, onboarding processes, board development, leadership pipeline, and operations.

IMPLEMENTATION: Keeping in mind the individual perspectives and gifts including time, knowledge, and resources that members have to offer, ensure board composition is sensitive to and, as much as possible, reflective of TBI's diverse membership.

IMPLEMENTATION: Prioritize recruitment of board members who have the capacity and willingness to consistently and meaningfully contribute to the fulfillment of the board's necessary functions.

IMPLEMENTATION: Update the board recruitment process to include both clear communication about expectations as well as specifics as to what a recruit's individualized roles and responsibilities are.

Strategy 4.A.2 The Board will be responsible for establishing and maintaining regular, supportive communication with committees

IMPLEMENTATION: Committee chairs will make one short (ten minute) presentation to the board per year in order to inform and educate board members about their committee's work and to share highlights as well as to answer general questions.

IMPLEMENTATION: Consider using the short board presentation as the basis for a newsletter highlight to publicly acknowledge and thank the committee for its good work.

IMPLEMENTATION: Committees chairs will submit a quarterly written brief blurb to the board before the quarterly meeting.

Strategy 4.A.3 Committee chairs will be supported to develop their committees including as feeders for board service and community-wide engagement and to ensure that all committees are fulfilling their duties to the TBI community.

IMPLEMENTATION: Ensure all committees have a mission statement, defined terms of service, and an engaged chair.

IMPLEMENTATION: Committee chairs will track shifts in membership and provide this information to the board.

Strategy 4.A.4 Promote transparent communication among the Board, Committees, Clergy, Executive Director, and membership.

IMPLEMENTATION: Create and schedule regular distribution and updating of a best practice guide for staff, board, and committee leadership to navigate typical work-flow procedural questions.

IMPLEMENTATION: Ensure board agenda and meeting notes are made available in a timely, accessible manner.

IMPLEMENTATION: Solicit membership feedback. Consider an annual survey or town hall or another format perhaps in conjunction with a regular communication piece

IMPLEMENTATION: Task an established committee or create a committee to monitor the 2024 Five-Year Plan's implementation.

GOAL 4.B: To have an adequate, capable staff who feel valued, appreciated and have a clear understanding of their role including expectations for their position.

Strategy 4.B.1 Provide staff with leadership capable of setting priorities, overseeing daily operations, delegating, and achieving coherence across people and programs to create an effective, well-connected team.

Strategy 4.B.2 Conduct a staffing needs assessment.

IMPLEMENTATION: Begin with a thorough review of staff perspective and recommendations.

IMPLEMENTATION: Consider dedicating FTE towards a programming professional and committee liaison, increasing caretaker capacity, and reviewing adequacy of in-house tech support and bookkeeping.

Strategy 4.B.3 Review and update staff policies and procedures, ensuring decision making processes are clear and accurate.

PILLAR 5: SOCIAL ACTION

Pillar 5 Rationale: Tikkun olam (repairing the world), gemilut hasadim (acts of kindness), ahavat Yisrael (love for our fellow Jews) are core Jewish values. TBI upholds these mitzvot through sustained, thoughtful engagement within our synagogue community as well as with our larger community.

GOAL 5.A: Cultivate strong community relations with local civic and religious organizations and leaders to promote mutual understanding and wellbeing.

- Strategy 5.A.1** Ensure the Rabbi and Executive Director have adequate, dedicated time to be actively engaged in relevant local leadership networks.

- Strategy 5.A.2** Maintain good relationships with other Jewish groups in Lane County as well as with regional, national and international Jewish organizations.

- Strategy 5.A.3** Support social justice initiatives identified and supported by the Board, Rabbi, and general membership.

- Strategy 5.A.4** Regularly inform the congregation of opportunities to engage in social action through volunteerism and advocacy.

GOAL 5.B: Congregants exercise their social responsibility through TBI.

- Strategy 5.B.1** Encourage the community to support and give generously of time, energy, and financial support toward synagogue efforts to assist congregants in need of critical social supports.

- Strategy 5.B.2** Regularly identify, promote, and create volunteer opportunities in service of the TBI community.