



## Mount Zion Temple 2014-18 Strategic Initiatives:

# Strengthening Connections

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### **Purpose: Building on Success**

The strategic plan brings new focus by Mount Zion's Board of Directors to four congregational priorities over the next five years. These goals augment the excellent on-going work by our committees, clergy and staff. They also are above and beyond our Jewish core "directions" (Kivunim) of Israel, Tzedek (Justice), Torah, and Shabbat that Mount Zion works on sequentially over a seven-year period. The strategic plan will help the Board focus its time, energy, and Temple resources to strengthen the foundation of Mount Zion as our spiritual home.

### **Theme: Strengthening Connections**

Several months of listening and analysis revealed that congregants are attracted to Mount Zion for many reasons: inspiring services and pulpit leaders, quality religious education, engaging programs, holiday and life cycle celebrations. We also heard (and observed in the data) that relationships are a critical part of what makes Temple involvement meaningful and enduring. The connections we have made and the connections we seek are a valuable part of Temple life. Therefore, "Strengthening Connections" will be Mount Zion's overarching strategic theme for the next five years.

### **Strategic Goals:**

## **I. RELATIONSHIPS:**

### **Creating New Opportunities for Connections**

**We will find ways to strengthen personal connections between and among congregants and with the clergy and staff, with an emphasis on connecting people across ages and cycles of life.**

Congregants value their connection to their constituencies (established cohorts such as Noazim (20s,30s), Sisterhood, Brotherhood, Prime Timers, SPORTY, B'nei Mitzvah families, Choir) and often form friendships within those groups. The data shows that, over time, congregants may have difficulty sustaining friendships and maintaining their connection to Temple life. In addition, many congregants expressed a yearning for sustained connections across the familiar boundaries of age, gender, and stage of life.

Key Deliverables of the Plan:

- Actions to create opportunities for connection outside of Temple (Chavurah, community service, etc.).
- Actions to create opportunities for cross-boundary connections (Noazim/Brotherhood/Sisterhood Shabbats, mentoring and professional/spiritual development, etc.).

- Actions to create opportunities for congregants to interact with clergy and staff (informal opportunities during religious school hours or via social media, formal opportunities via life cycle events, meals, study, etc.)

**Therefore, the Steering Committee proposes (based on action team reports):**

**Phase I (2014-15): Energize and Connect Individuals**

- Implement Nametags at Services and Events (Membership Committee)
- “Ask Me?” table at Oneg Shabbats to enhance welcoming (Membership)
- Mensch Ambassadors: Learning stories of new members (Ellen Konstan) and current members (Phil Goldman) (Membership)
- Deepen Connections to Congregants and Clergy through forming four Mussar Groups (Clergy/MaZAL)
- Enhance physical space in Lipschultz Lounge to make more inviting, relational (Arts/Décor).
- Develop an annual assessment of Mount Zion members’ satisfaction at MZ (Membership Committee)

**Phase 2 (2015-16): Invest in Nurturing Participation**

- Continue above efforts.
- Create opportunities for small group, informal clergy gatherings.
- Consider Coffee Shop options

**Phase 3 (2016-17): Foster On-going Creation of Small Groups**

- Consider different models of “chavurah” opportunities at Mount Zion.

## **2. PARTICIPATION:**

### **Inviting Participation and Support for Each Other**

**We will facilitate ways members can volunteer in personally fulfilling ways and foster the initiative of members to give and receive help.**

We want each member of Mount Zion to feel, “I am valued here”. Core to being valued is to be asked to help in meaningful ways (based on skills and interest) and to receive and give the help that feels right, acting as a community to celebrate joys and comforting sorrows.

Key Deliverables of the Plan:

- Actions to encourage individuals to offer, give and receive help, to give comfort and to share celebrations with other congregants.
- Actions to ensure the vitality of the Caring Community Program.

- Actions to increase the number of people who volunteer for Temple activities with an emphasis of
  - A. Knowing members' interests and skills.
  - B. Recognizing and honoring participation.

**Therefore, the Steering Committee proposes (based on action team reports):**

**Phase I (2014-15): Energize and Connect Individuals**

- Set up a *Member Engagement Task Force* to assess current volunteerism, create 'shite paper' on best practices, and develop job description for participation/communications specialist
- Strengthen institutional knowledge and experience in managing the Caring Community by enlisting coordinators for meals and rides and by writing a Caring Community manual
- Set up an Activity Fair for current members of ways to be involved.

**Phase 2 (2015-16): Invest in Nurturing Participation**

- Member Engagement Task Force ends and Member Engagement Sub-Committee is formed
- Staff leader is selected for participation/communications. This person institutes new volunteer programs, develops infrastructure for data collection and analysis, promotes diverse volunteer options, conducts training

**Phase 3 (2016-17): Foster On-going Creation of Small Groups**

- Continue work.

### **3. DIGITAL COMMUNICATIONS: Enhancing Effective Communication**

**We will adopt and continuously evolve digital communications technology so congregants can use the tools they find valuable in their personal and work lives to fully engage with Temple life.**

We are in the midst of rapid, continuous adoption of digital communication tools that change the way people and organizations interact. Mount Zion has basic digital communication capabilities but can improve them by taking advantage of the many ways our congregants and potential members use technology to interact with each other and the Temple.

Key deliverables of the plan:

- Actions to infuse digital technology into Temple communications.
- Actions to ensure that digital technology continues to evolve.

The Strategic Initiative action team focused on the digital communications goal will reach out to our standing committees, particularly the Religious School committee which has a strong interest in the use

of technology within the Religious School, to identify common goals, needs, and recommended tactics for digital communications technology.

**Therefore, the Steering Committee proposes (based on action team reports):**

**Phase I (2014-15): Energize and Connect Individuals**

- Set up a *Communications Task Force*
- Consider re-branding Mount Zion to make the vision more visible in our daily interaction with Temple programs and communications
  - Connect, Learn, Pray, Act
  - Perhaps a phrase to draw people in, specific to MZ
- Make ‘leaps’ forward in digital communication such as:
  - Transform weekly email into weekly Shabbat card edited by clergy
  - Re-do website to make it mobile-first and interactive
  - Bring music, classes, sermons on-line including live-streaming
  - “Humans of Mount Zion” – from video to personal interest stories on Facebook connected to site
  - Make push to have all members join MZ Facebook page
- Assess staffing needed to continue efforts; create job descriptions in conjunction with Member Engagement Task Force

**Phase 2 (2015-16): Invest in Nurturing Participation**

- Staff leader is selected for participation/communications. This person works with the Communications Task Force (perhaps now a committee TBD) to continuously evolve the ‘how’ we communicate in keeping with common practices amongst our members

**Phase 3 (2016-17): Foster On-going Creation of Small Groups**

- Continue work.

## **4. GIVING: Inspiring Financial Support**

**We will grow non-dues revenue to provide a reliable funding source for our sacred work.**

Research shows that dues and user fees alone are not sufficient to fund a vibrant congregation. A culture of voluntary giving rests on the foundation of a strong personal connection to the Temple and being in relationship with the clergy or lay leaders asking for support. Eliciting predictable income from individuals (annual and special donations or legacy gifts) will establish a healthy complement to our annual commitment and fee-based programs.

Key deliverables of the plan:

- Match or exceed the benchmark of other, similar-sized congregations by increasing annual gifts from 2% to 6%.

- Actions to build the Fund for Mount Zion as a reliable component of annual Temple revenue.
- Actions to make it easy and attractive for congregants to support programs that are personally meaningful.
- Actions to formalize and energize a culture of legacy giving.
- Actions to communicate the importance of every congregant's financial contribution.
- Actions to train clergy and lay leaders to converse with congregants about voluntary giving.

The Action Team work will supplement the on-going work on dues and expenses. These areas are out of scope for the team working on this strategic goal.

**Therefore, the Steering Committee proposes (based on action team reports):**

**Phase 1 (2014-15): Energize and Connect Individuals**

- Hired an Annual Campaign Coordinator. (Done)
- Established the 5775 L'Chaim Annual Campaign for Mount Zion with goal of participation and revenue of \$126K, which was included in the 2014/15 budget. (Done)
- Assess capabilities going forward for annual campaigns.

**Phase 2 (2015-16): Invest in Nurturing Participation**

- Continue above work.
- Create clear Legacy Giving Program.

**Phase 3 (2016-17): Foster On-going Creation of Small Groups**

- Continue above work.
- Create clear Development Program at MZ.

# SUMMARY OF MZ's STRATEGIC PLAN

## Phase I (2014-15): Energize and Connect Individuals

- Tactical 'Connection' changes such as:
  - Implement Nametags at Services and Events (Membership Committee)
  - "Ask Me?" table at Oneg Shabbats to enhance welcoming (Membership)
  - Mensch Ambassadors: Learning stories of new members (Ellen Konstan) and current members (Phil Goldman) (Membership)
  - Deepen Connections to Congregants and Clergy through forming four Mussar Groups (Clergy/MaZAL)
  - Set up an Activity Fair for current members of ways to be involved. (Membership)
  - Make 'leaps' forward in digital communication such as:
    - Transform weekly email into weekly Shabbat card edited by clergy
    - Re-do website to make it mobile-first and interactive
    - Bring music, classes, sermons on-line including live-streaming
    - "Humans of Mount Zion" – from video to personal interest stories on Facebook connected to site
    - Make push to have all members join MZ Facebook page
- Consider re-branding Mount Zion to make our vision visible every day
- Enhance physical space in Lipschultz Lounge to make more inviting, relational (Arts/Décor).
- New Lay Committees to further efforts:
  - Set up a *Member Engagement Task Force (2014/15) and Member Engagement Subcommittee (2015 on)* of Membership Committee.
  - Set up a *Communications Task Force*.
- Strengthen institutional knowledge and experience in managing the Caring Community by enlisting coordinators for meals and rides and by writing a Caring Community manual
- Hire an Annual Campaign Coordinator.
- Establish the 5775 L'Chaim Annual Campaign for Mount Zion with goal of participation and \$126K.; Assess capabilities going forward for annual campaigns.
- Develop an annual assessment of Mount Zion members' satisfaction at MZ (Membership)

## Phase 2 (2015-16): Invest in Nurturing Participation

- Create opportunities for small group, informal clergy gatherings.
- Staff leader is selected for participation/communications. This person institutes new volunteer programs, develops infrastructure for data collection and analysis, promotes diverse volunteer options, conducts training to support participation and leads ongoing evolution of the ways we communicate.
- Create clear Legacy Giving Program.
- Consider Coffee Shop options.

## Phase 3 (2016-17): Foster On-going Creation of Small Groups

- Consider different models of “*chavurah*” opportunities at Mount Zion.
- Create clear Development Program at MZ.

## Mount Zion

### *A welcoming and vibrant Jewish spiritual home.*

Our strategic plan builds on Mount Zion’s strengths:

- **CONNECT**
  - *Kehillah Kedushah* - Inclusive, Multigenerational Community
  - **Connecting** Face to Face / *Panim el Panim*
- **LEARN**
  - *Torah* - Life-Long Learning
  - Take Hold of **Torah**
- **PRAY**
  - *Avodah* – Worship; inspiring music
  - Make **Shabbat** Your Sanctuary
- **ACT**
  - *Gemilut Chasadim* - Acts of loving-kindness
  - Caring Community
  - **Tzedek**=Justice -- We make a difference
  - We Stand with **Israel** / We Pray for Peace in the Middle East
  - Israel: Wrestling with our Relationship

Our plan over the coming years will enhance our vision in the following ways:

- A focus on creating more opportunities for connections with congregants and clergy.
- More opportunities to volunteer in meaningful ways.
- A leap forward in digital communication.
- An annual campaign to provide the resources to maintain our congregation year after year.