



Mount Zion Temple

Strengthening the Future:

Strategic Plan, 2019–2021

Introduction and Context

In 2014, Mount Zion adopted a five-year strategic plan, entitled “Strengthening Connections.” This ambitious plan was crafted to meet the needs of a changing membership within our larger Jewish community. Building on Mount Zion’s many strengths, the 2014 Plan identified four areas of need and opportunity:

1. Finding better ways to support relationship building among congregants and with clergy;
2. Creating more opportunities for participation and ways to support each other;
3. Improving digital communications; and,
4. Inspiring a culture of giving, shifting how Mount Zion invites financial giving.

Today, initiatives from the 2014 plan are well underway. This 2019-21 Strategic Plan broadens and extends the previous plan, allowing expanded implementation of these initiatives and setting the stage to more fully examine Mount Zion’s priorities in 2022.

Theme: Strengthening the Future

For 2019–2021, Mount Zion will strengthen the future by building on the substantial successes and ongoing work towards three goals:

1. Fostering Congregational Engagement
2. Enhancing Communications
3. Sustaining Financial Strength

The 2014 Strategic Plan described two closely-related goals: *Relationships* and *Participation*. Since 2017, the efforts and actions related to these have been brought together organizationally within Mount Zion’s Engagement Initiative. For the next three years, we combine these two goals into one strategic direction—*Fostering Congregational Engagement*.

This three-year Strategic Plan extends and updates the 2014 Plan. In 2022, we will begin the process anew. In the three years leading up to that time, Mount Zion will create a special

kivvun, a congregational focus, to explore creative models of thriving Reform congregations and other faith communities. Learning about best practices, changing trends in American Jewish life and synagogue affiliation, and the unique circumstances of the Twin Cities will help Mount Zion boldly situate itself to serve our community for generations to come.

Goal #1: Fostering Congregational Engagement

Engage more members more actively in Temple life through active participation—giving and receiving help, volunteering, and creating deep and meaningful relationships with other members, clergy, and staff.

Key Accomplishments to Date

- Developed Mount Zion’s Engagement Initiative and hired a staff person to lead the initiative.
- Launched the *MZ Connect* portal and *MZ Small Groups*, creating opportunities for congregants to build relationships through shared activities and interests.
- Redesigned the Lipschultz Lounge to afford opportunities for congregants to enjoy each other’s company when at Mount Zion.
- Initiated Mussar groups to deepen Jewish spirituality practice and relationships among group members.
- Enriched Shamash Corps inclusion training and practice to emphasize welcoming, relationship-building, and inclusion.
- Continued emphasis on LGBTQ inclusion.
- Increased efforts at accessibility and inclusion (Mount Zion was acknowledged as Exemplar Congregation for Disability Inclusion by the Union of Reform Judaism in 2015).

Overview of the Plan for 2019–21

How does our work connect congregants to each other, clergy, staff, and Temple? This will be the primary question for all of Mount Zion’s efforts during the next three years while we focus on further developing people, programs, and initiatives to answer this question. Special efforts will include reaching out to younger Jews in the community to lay the groundwork for the next decades of Mount Zion members and institutional purpose.

Specific Continuing Efforts and Future Directions

- Grow the *MZ Connect* initiative to include many more members and increase the possibilities for connection among members by:
 - Continuing to build *MZ Small Groups*.
 - Strengthening robust teen engagement.
 - Reaching out to young adults, families, and empty nesters.
- Support and strengthen the Caring Community Program as it completes its transition to new leadership and new procedures.
- Continue to explore how Shabbat services and practices create more opportunities for connections among congregants.
- Continue to emphasize inclusion and accessibility.

- Promote social justice work that engages a broad array of the congregation.
- Promote joyous events within the Mount Zion community.
- Find new opportunities for new members to integrate into the Mount Zion community.
- Explore models and practices for creating a vibrant Jewish congregation in the 21st Century.
- Seek new ways to invite Mount Zion congregants to participate in the Mount Zion community.
- Honor Mount Zion congregants who volunteer and give of their time to strengthen our community.

Goal #2: Enhancing Communications

Adopt and evolve communications to enrich and strengthen the Mount Zion community.

Key Accomplishments to Date

- Produced “This Week at Mount Zion” emails
- Provided live-streaming services.
- Rebranded Mount Zion with new logo and web presence.
- Increased use of and postings to various social media platforms.
- Improved communication to the Religious School community.
- Made the Mount Zion website mobile-friendly.

Overview of the Plan for 2019–21

The goal for the coming years is to strengthen communications even more. We will focus on three areas: building the capacity for more staff and congregants to be more fluent in different media; creating or updating key communication efforts that support the Mount Zion community; and using communication media strategically to engage more members more consistently.

Specific Continuing Efforts and Future Directions

- Form a communication technology committee to support and spur improvement and innovation.
- Work with a URJ media program to determine the purposes and parameters for various media platforms.
- Educate staff, clergy, and congregants in the use of media platforms to facilitate their participation in the Mount Zion community.
- Consider how to create a member directory that is easily updatable and accessible
- Invite participation via live-streaming.
- Integrate communication and outreach plans into program and engagement efforts.

Goal #3: Sustaining Financial Strength

Identify sustainable funding sources and appropriate congregational expenses to assure reliable budgets for our sacred work, as well as seek legacy funds for future needs.

Key Accomplishments to Date

- Launched an Annual Campaign in 2015 that has raised approximately \$150,000 per year.
- Launched a Legacy Campaign in 2017 to secure long-term funding.
- Clarified financial reporting to greatly improve the ability of the Board and other decision makers to understand Mount Zion's budget and financial picture.
- Conducted feasibility study and prepared to launch an Endowment Campaign in 2019.
- Conducted a thorough review of investment practices and restructured finance-related committees to provide greater coordination and improved oversight.

Overview of the Plan for 2019–21

The focus will be on an Endowment Campaign that can provide once-in-a-generation funding for transformational efforts. To support the campaign and smart fiscal management of all temple funds, Mount Zion will simplify the restricted fund structure as well as articulate a set of giving principles to guide current and future fundraising.

Specific Continuing Efforts and Future Directions

- Conduct an Endowment Campaign in 2019-20 to raise \$5 million.
- Refine Mount Zion's giving and spending principles in coordination with the Board of Directors.
- Develop a stewardship program to nurture long-term relationships.
- Streamline the structure of endowment funds and update current restricted funds to clarify purpose.
- Communicate Mount Zion's culture of honoring every congregant's contribution – financial and otherwise— at all levels.
- Continue the development of the Legacy Giving Initiative and secure commitments from donors.