

## Summary of Strat Planning Meeting September 11, 2013

Because we had already created a vision statement Bob Leventhal was going to customize our next steps for us. – he has done that

Our visioning exercise is to review what we have

Everyone should view this – mission, vision and values

Penina – when we are working thru items; lets do our committee first and then thru the board; if we go in cold; will not be as effective

Penina: We need to have 3 priorities that we bring to the board; there may be 20; let people talk and modify and accept or reject.

Mordi: CBI has the opportunity to be the jcc of the upper valley; is it a large step to being a synagogue in the conservative mode to a partnership with organizations – if Cbi were to have a community center;

If u could make one change – we went around the room

Increasing the space for the garden;

Pairing up the showcasing member talents with human capital of the five colleges; Making them stepping stones; Using one to work towards the other;

There is a senior group that meets; but it is an old senior group but it doesn't appeal to me – active retirees is a key group;

Having a much more robust adult education program, learning in retirement; melton; thur social media; what have some other synagogues done. But the flip side is that u r going against a demographic trend; they want to do something different. Look at this program – from alan berkenwald;

Skeptical of the community center; campaign to have dinner in someone else's home

We organize changes around 3 major areas:

- a. Environment
- b. Social action
- c. Arts

If we planned on these 3 areas – invite people in; it is around a reason; connecting it to Judaism; why jewish tradition supports and enriches these areas. If u want to go forward with categorization of 3 areas– does we need a separate category; for spirituality – or else; What are the different lenses that u r going to use for each of these three areas.

Infrastructure; how do we see ourselves as a community; what is the narrative and how do we want to carry that forward.

Another perspective: 3 interest or vision: People to people, Infrastructure; Vision

Above considered a big vague

Bringing people into the building is a great idea;

Jcc movement is relatively profitable.

Jcc's are the largest recipient of the federation funding.

*Most of our time was spent on a SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats) – material copied from sheets on the wall*

### **Strengths**

3 Broad Categories

1 – location and infrastructure

2- existing stability

3- spirit of innovation

### *Detailed Categories*

Location (bldg w land) -1

Schools – gan keshet and lga – are nearby -1

Size of membership –resources, critical mass - 2

Wealth – within limits -2

Programs – well attended – 3

Spirit of warmth/ creativity – 3

Long term stability of rabbi- 2

New vision for religious school -3

Sense of community -3

Conservative affiliation - 2

Talented members (arts, Judaism, religious) etc -3

Kiddushim - 3

Garden/farm - 3

Alternative minyanim -3

Maturity/stability -2

No debt - 2

Well run cemetery -2

Economical/diverse membership -2

Improve web site - 3

### **Weaknesses**

3 broad categories:

1. Space and infrastructure

2. Human/personal engagement; disconnect between vision and ability to activate

3. Resources

### *Detailed categories*

Insufficient number of young families: - 3

Not as warm / welcoming as it could/should – 2

Space doesn't feel warm or inviting – 1

Interior spaces (e.g. library) do not feel warm or inviting – 1

Banquet facilities – 1

High number of abated families – 3

Lack of sufficient volunteers – 2

Lack of mechanisms of heal conflicts – 2

Professional stability 2

Instability of religious school (historically) 2

Not enough financial resources 3

Declining membership 3

Volunteer leadership development is lacking -2

Adult education mixed – 2

### **Opportunities**

More partnerships – esp Iga; many others – Jewish institutions, rabbis, other synagogues

Facility improvement – small or major

Showcase member talents – esp the arts

Religious school

Reaching out to active retirees – new and existing

Reaching out to Smith College in a new way

Take advantage of changes in technology, including social media; use technology for outreach.

Grants

Growing environmental awareness

Online opportunities for giving

Audience for kosher banquets/events/ parties

Five colleges – human capital

Bequests/legacy giving as membership ages

### **Threats:**

Security

Not a growing population

Reputation

Aging Population

Competition – more choices in the area : religious schools, synagogues

LGA's financial situation

Lack of commitment to synagogues/religious institutions

Social media

Decline of conservative movement nationally

Economic stagnation of western mass

Empty nesters and bar/bat mitzvah disengagement