



CONFIDENTIAL

Beth Tzedec Congregation  
Draft Strategic Plan (2022 - 2024)

2022-06-14

Prepared by ViTreo Group Inc

## Overview

### Beth Tzedec's Vision and Mission

**VISION:** Inspire Innovative learning, spiritual growth, compassion, and the joyous expression of conservative Jewish living in the home, Synagogue & community.

**MISSION:** To be developed by the Board, post the June 2022 AGM

**VALUES:** We will build our brand identity in a conscientious and consistent manner with our primary aim to create an organization that is sustainable, stable and responsive to our members and the greater Jewish community.

### Strategic Pillars:

STRATEGIC PILLAR #1 Increasing Engagement across the Congregation

STRATEGIC PILLAR #2 Developing increased Capacity for the Synagogue to reach our full potential

STRATEGIC PILLAR #3 Securing the resources required to deliver on our vision

## Strategic Pillars

**STRATEGIC PILLAR #1: INCREASING ENGAGEMENT ACROSS THE CONGREGATION.** This pillar presents a continuous focus on engaging our current and future member base. Facing the realities of a smaller Congregation with new time constraints on the day-to-day lives of our congregants, it is crucial for Beth Tzedec to examine the execution of all its programs and strategies; both revising and creating new actions to both attract and retain an engaged Congregation.

Goals/Actions	Implementation			Resources	Lead by	
	2022	2023	2024	S = Staff B- Board C = Consulting \$ = Budget	Board	Staff
<b>1. Develop a comprehensive volunteer engagement program</b> <i>includes a coordinator (staff or volunteer); may include a board member to oversee the initiative</i>				B, S	B	
<b>2. Develop a 21<sup>st</sup> century digital transformation plan</b>						
<b>2.1 Develop hybrid (in person/digital) services</b> <i>maximize engagement and consider an inclusive community</i>				S, \$		S
<b>2.2 Implement and leverage hybrid (in person/digital) services</b>				S, \$		S
<b>2.3 Develop a marketing and communication plan</b> <i>include current and traditional communication tools and methods</i>				B, S, \$		S
<b>2.4 Implement marketing and communication plan</b>				B, S, \$		S
<b>3. Develop member programs by age and stage</b> <i>Segment membership and consider appropriate communication and volunteer strategies for each</i>				S, \$		S
<b>4. Review, renew, and upgrade congregation engagement methods, styles, and processes</b>				S, B, \$		S
<b>5. Continue and enhance ongoing Jewish education</b> <i>beyond just Bar Mitzvah and Bat Mitzvah</i>				S, \$		S
<b>6. Develop a formal “passing of the torch” program between age and stage demographics in the congregation</b>				S, B	B	

7. Implement a formal “passing of the torch” program between age and stage demographics in the congregation				S, B	B	
8. Grow existing and develop new partnerships with other Jewish organizations in Calgary				B	B	
9. Develop “multiple doors of entry” plan for new members.				B, S	B	
10. Implement “multiple doors of entry” plan for new members.				B, S	B	
<b>Key Performance/Measurement Indicators</b>						
Measure growth in your membership, by your segmentation strategy, year over year, measuring retention, new members, recapture of members, growth of your youth base, etc.						

**STRATEGIC PILLAR #2: DEVELOPING INCREASED CAPACITY FOR OUR SYNAGOGUE TO REACH ITS FULL POTENTIAL.** Building on the strength of Beth Tzedec’s financial health, this pillar focuses on ensuring the financial management, stability and growth in support of our engagement and program initiatives. Key aspects of this pillar include developing and implementing a fundraising development plan and developing a long-term plan related to the building.

Goals/Actions	Implementation			Resources	Lead by	
	2022	2023	2024	S = Staff B- Board C = Consulting \$ = Budget	Board	Staff
11. Develop a fundraising development plan				B, S, C, \$	B	
12. Implement fundraising development plan				B, S, \$		S
13. Develop a long-term financial plan related to the building <i>include renovate or relocate options</i>				B, S	B	
14. Integrate (into marketing and communications plan) plans to educate membership on fundraising in general and a capital program and endowment fund options specifically				S		S
15. Evaluate current cemetery asset and plans <i>assess options to retain or evaluate alternatives</i>				B	B	
<b>Key Performance/Measurement Indicators</b>						
Fundraising Development plan created and launched. Measured, increased financial funding from alternative funding sources other than current membership and endowment funds.						

**STRATEGIC PILLAR #3. SECURING THE RESOURCES REQUIRED TO DELIVER ON OUR VISION.** The final pillar in our plan will be to ensure we have deployed an effective support staff model, optimizing those resources to execute on our programs and leverage a reinvigorated volunteer base. Key to this pillar will be a focus on the roles and structure of an effective Board of Directors.

Goals/Actions	Implementation			Resources	Lead by	
	2022	2023	2024	S = Staff B- Board C = Consulting \$ = Budget	Board	Staff
<b>16. Increase Rabbi Cantor Russ’ ability to meet with more of the congregation and the broader community through the addition and allocation of staff resources</b> <i>Look to delegate tasks and add resources to leverage his time</i>				B, S, \$	B	
<b>17. Develop a programming staff resource</b> <i>Currently filled (full or part time), could be augmented, and supported with a volunteer resource(s)</i>				S, \$		S
<b>18. Implement programming staff resource</b>				S		S
<b>19. Develop the education staff role</b> <i>This role has recently been hired (2022)</i>				S		S
<b>20. Develop a volunteer coordinator role</b> <i>This role may be ideal for a volunteer</i>				B, \$	B	
<b>21. Develop a board governance structure that reflects the current and future needs of the synagogue</b> <i>(i.e., enable and empower committee work by volunteers)</i>				B, C, \$	B	
<b>22. Implement changes to the board governance structure</b>				B	B	
<b>23. Implement a board development plan</b> <i>increasing the knowledge of the board’s role, building a more cohesive team, and implementing a board succession plan</i>				B, C, \$	B	
<b>Key Performance/Measurement Indicators</b>						
Size of staff, how much time of Rabbi Cantor Russ’ time have you freed up? Progress of Board effectiveness.						