



Strategic Plan Summary

2023 - 2026

“A dream written down with a date becomes a goal. A goal broken down into steps becomes a plan. A plan backed by action makes your dreams come true”

Greg S. Reid

Welcome to JRC

OUR MISSION

JRC is a diverse, participatory, and sacred community dedicated to a daring, deeply-rooted, Judaism.

OUR VISION

JRC will thrive as a celebratory community that joyfully innovates and reconstructs our Judaism to create an engaging and relevant spiritual home for generations to come.

OUR CORE VALUES

- ***Kehillah, Community:*** We value our collective life as a congregational community.
- ***B'tzelem Elohim, Made in God's Image:*** Affirming with understanding and acceptance the fundamental equality, fair treatment, and inclusion of all people regardless of our differences.
- ***Tikkun Olam, Repair of the World:*** We are committed to creating a just world and supporting others in this mission.
- ***Chesed, Loving Kindness:*** Showing up for one another and taking action to help those in need.
- ***Living in Two Civilizations:*** As Reconstructionist Jews we understand that we live in both American and Jewish civilizations - and that the values of each support and strengthen our identity as Jewish Americans.
- ***K'vod Sicha, Respectful Conversation:*** We use an intentional process to discuss difficult issues in order to honor our diversity, encourage a cohesive congregation where we agree to disagree, and allow authentic conversations to unfold.
- ***Bal Tashchit, Do Not Waste or Destroy:*** We take seriously our responsibility to preserve and replenish the Earth's limited resources.

THE PLANNING PROCESS

Strategic planning is an active and evolving process where synagogue lay leaders and staff create a roadmap for the next three to five years. A short-term (18-month) plan was adopted by JRC's Board in December 2020, given the uncertainty of the COVID-19 pandemic. In Fall 2021, the Strategic Planning Team set a goal to develop a new Strategic Plan to help JRC move forward, as we return to our building with multi-access programming.

Continuing to use a design thinking approach, the work of the Strategic Planning Team can be summarized in five steps.

Step 1. We began by reviewing the 2020 JUF Jewish Chicago census data and the 2020 Pew Research national study data to examine how these trends compared with our own congregational needs.

Step 2. We sought input from our members. From November 2021 to January 2022, all adult members, including our newest adult members from 7th to 12th grade, were invited to participate in small focus groups, both in-person and on Zoom. The demographics of the more than 50 focus group participants were closely representative of each membership category, geographic location, and years of membership. Participants shared what attracted them to JRC, what would enhance their experience in our community, and what dreams they had for JRC's future.

Step 3. We summarized ideas expressed in the focus groups. Members repeatedly told us that JRC is a comfortable spiritual home. While they want to maintain open, inclusive, approachable connections with one another, it is also critical to decrease silos and barriers to participation within our community and to find meaningful ways to connect.

THE PLANNING PROCESS (CON'T)

Members also desire diverse and enhanced, multi-generational educational, ritual, and social programs that explore a variety of topics through a Jewish lens. To meet these current opportunities and create a sustainable future, members seek greater transparency in the relationship between money and membership size. They desire a more focused public image emphasizing our uniqueness, joyful celebrations, and how we show up and care for one another.

Based on what we heard at these meetings, the strategic focus areas of *Community*, *Jewish Experiences*, and *Growth and Retention* emerged.

Step 4. JRC's Annual Planning Retreat was held in February 2022. Using the focus groups' input, the Board and staff together re-examined JRC's Vision Statement and Core Values to create goals for the next three years. Over the following two months, the Strategic Planning Team worked to create this Plan.

Step 5. This Strategic Plan is a living, dynamic document. Each year, the Board and staff will set an action plan to implement, evaluate, adjust, and accomplish the goals of this plan.

OUR GOALS

Goal 1: *Kehillah/Community*

וַיִּקְהַל מֹשֶׁה אֶת-כָּל-עֵדֻת בְּנֵי יִשְׂרָאֵל
Vayakhel et kol adat bnai Yisrael

And they convoked the entire community of Yisrael (Exodus 35:1)

Within the next three years, JRC lay leaders and staff will nourish opportunities for members to connect with one another in order to have *chaverim* (friends), *minyan* (a spiritual and ritual collective), and *achrayut* (responsibility for and commitment to one another – a sense of community).

Goal 2: *Chavayah/Jewish Experiences*

נַעֲשֶׂה וְנִשְׁמַע
Na'aseh v'nishmah

We will do and we will learn by doing

Within the next three years, JRC lay leaders and staff will expand the tools that enable members to bring our talents, knowledge and creativity to co-create vibrant Jewish learning, ritual practice, tikkun olam, and celebratory community experiences that reflect our values.

Goal 3: *Harchavah: Growth and Retention*

הֲרַחֲבִי אֶמְקוֹם אֹהֶלְךָ יִרְיעוֹת מִשְׁכְּנֹתַיִךְ
Harchivi m'kom Elohayich v'yiri'ot mishkenotayich
Enlarge the size of your tent, expand your sacred dwelling place
(Isaiah 54:2)

Within the next three years, JRC lay leaders and staff will develop and implement membership retention and growth strategies to reach our goal of a 500+ household congregation, in order to sustain a vibrant community that serves and engages our members.

ACTION PLAN

During Spring and Summer 2022, JRC's lay leaders and staff will set priorities and develop an action plan to achieve these goals for implementation in FY 2023 and beyond. The Strategic Planning Team looks forward to partnering with the broader JRC community in the work ahead.

SPECIAL THANKS TO

The Strategic Planning Team:

* Becca Sperling * Linda Mathias Kaskel * Diana McNelis * Kim Moldofsky
* Cindy Aaronson * Cece Lobin * Megan Kashner * Barbara Pinzur * Debi Lewis

In addition to:

* The JRC Board of Directors
* The JRC Staff and Clergy
* Focus Group Participants

Approved by JRC's Board: April 13, 2022

ACTION PLAN FY 2023

Goal 1: Within the next three years, JRC lay leaders and staff will nourish opportunities for members to connect with one another in order to have *chaverim* (friends), *minyan* (a spiritual and ritual collective), and *achrayut* (responsibility for and commitment to one another – a sense of community).

Objective 1.1: Vibrant calendar - By June 2023 Member at Large Hanna Seltzer will coordinate with VPs of Financial Development, Program and Ritual, Education, Membership, Administration, President and staff to build on 2022/23 programming and create a vibrant programming, ritual, fundraising, and governance calendar for FY 2024 (and a system in place for annual advance program planning) that includes a thriving Kehillah Shabbat AND Sunday – Thursday programming and educational opportunities at JRC, in members homes, or on-line. [NOTE this objective also pertains to Goal 2 below]

Action Step 1: 2022-23 activities: VP of Education Robin Byster, VP Program and Ritual Marie Davidson, VP Tikkun Olam Anne Wildman, Tikkun Olam task forces, and Member at Large Hanna Seltzer, and the “Dream and Plan Team” will collaborate to plan and recruit members to populate vibrant Kehillah Shabbat programming and to encourage Sunday -Thursday programming and will document the results and lessons learned

Action Step 2: 2024 Calendar - The Dream and Plan Team and VP of Program and Ritual will present a 2024 calendar to the board by May 2023

Action Step 3: Monitoring - Member at Large Irv Miller will monitor programming at Mishkan and other synagogues and submit updates and suggestions to the Dream and Plan Team quarterly

Action Step 4: Reconstructing Judaism - Rick Kulp and Jonathan Markowitz will serve as connectors to Reconstructing Judaism, and encourage staff to promote movement events using JRC channels as an ongoing opportunity, and will collaborate with the VP of Program and Ritual and Dream and Plan team to identify opportunities to link more directly to JRC programming (e.g. visiting scholars, JRC discussion groups using RJ programs, etc.)

Action Step 5: VP of Tikkun Olam Anne Wildman will work with Laurie Goldstein and Christine Duffy Levy to evaluate the success of the 2021-22 Israel/Palestine Heruta pilot and determine whether there is interest in future programs to engage members around Israel/Palestine learning/difficult

conversation opportunities

Action Step 6: VP of Tikkun Olam Anne Wildman and VP of Program and Ritual Marie Davidson will collaborate to ensure JRC's Equity and Anti-Racist lens is incorporated in all program planning

Objective 1.2: Measuring member satisfaction and engagement - By June 2023, the VPs of Membership, Program and Ritual, Education and respective committees and JRC staff will develop methods to gather feedback from members about their satisfaction, engagement, needs and desires, and propose to the board how to ensure that the Board has ways to continually learn about and assess members' connection to each other and JRC in order to ensure that our programs and activities are meeting members needs.

Action Step 1: VP of Education Robin Byster will work with Rabbi David to develop feedback mechanisms for Chodesh Shabbat family programming such as surveys, focus groups or other mechanisms

Objective 1.3: Multi-access programming to support membership retention and growth - By January 2023, VP of Administration David Tabak, working with VP of Program, Ritual Marie Davidson, and Member at Large Luke Adams, Tech team, Accessibility and Inclusion volunteers, VP of Program and Ritual, Marketing team, and staff will build on continuing offerings and update the Board on a plan, budget, and volunteer recruitment/staffing system for implementing technology to continually offer and improve multi-access programming. Budget implications will be considered in the 2024 budgeting process, with proposed budget numbers due in January 2023.

Action Step 1: David Tabak will convene tech team with program and ritual stakeholders to discuss opportunities for multi-access and identify roles and responsibilities

Objective 1.4: Accessibility and inclusion plan - By July of 2023, the VP of Membership Rick Kulp, VP of Administration David Tabak, VP of Education Robin Byster, and Executive Director Micky Baer will work with accessibility and inclusion volunteers across different areas to identify a comprehensive accessibility and inclusion checklist, get cost estimates, and identify goals for fundraising and/or other revenue sources to incorporate into the 2025 budget and beyond.

Action Step 1: The House Committee with leadership from David Tabak and Executive Director Micky Baer will refine plan and identify budget sources to

work towards implementing spring 2022 7th grade gender neutral bathroom proposal

Action Step 2: Inclusion coordinator Fran Shapiro, Rabbi David Eber, and accessibility and inclusion team volunteers will implement plans to accommodate neurodiverse children and children with other disabilities in education programs, and recommend any budget considerations for the FY 2024 budget to VP Education Robyn Byster by December 2022.

Action Step 3: Micky Baer, Maria Tolpin, Linda Kaskel, Emily Harris and others to be named will revisit the lists assembled at the June 2021 Access and Inclusion brainstorm together with historic lists assembled by Linda Kaskel and prior committees, and will prioritize a list of items and budget implications to recommend to the relevant VPs by May 2023 for consideration by the board in September 2023 and inclusion in the January 2024 budgeting process if appropriate.

Goal 2: Within the next three years, JRC lay leaders and staff will expand the tools that enable members to bring our talents, knowledge and creativity to co-create vibrant Jewish learning, ritual practice, tikkun olam, and celebratory community experiences that reflect our values.

Objective 2.1: Connecting Members to Opportunities - By June 2023, Members at Large Luke Adams and Andrew Segall working with the VP of Membership, and President Elect or Immediate Past President, Leadership Development committee (Robin Trilling and Lou Weiss co-chairs) and with the Executive Director or designated staff will be ready to pilot a robust system for connecting/recruiting members to essential activities/tasks (see 2.2) that fit member interest and availability, and advance the goals of this strategic plan and JRC's vision. The system will eventually enable JRC to actively track and record history of member engagement in individual volunteer tasks, task forces, committees, work groups or teams, and programs that meet JRC's and members' needs. Budget implications will be considered in the 2024 budgeting process, with proposed budget numbers due in January 2023.

Action Step 1: Find viable options to consider (much of this work is complete already). Contact related orgs to find out what they are doing and how well it does/doesn't work for them. Core team to review of discovered ideas, commercial and open-source options. Pair down list of options to final idea/candidate.

Action Step 2: Explore funding options, if needed. Discuss with Micky and stakeholders how the JRC budget can/should be adjusted to provide for such a system by Jan 2023.

Action Step 3: Acquire product and/or implement tools. Core team to acquire and begin setup, testing. Work with Micky and/or other staff to obtain relevant data held in ShulCloud.

Action Step 4: Testing, tweaking and teaching of system. Core team to continue to test and refine the system and teaching of system to other stakeholders.

Action Step 5: Pilot system. Core team, stakeholders, other board members and others to put the system through either a simulation or used side-by-side with current system to experience how it works in action without risk.

Objective 2.2: Refining JRCs lay engagement structure - By March 2024, the JRC Board will propose to the membership amendments to bylaws to reflect new structures and practices for participation and leadership development, succession planning, and avenues for lay engagement (e.g. teams, task forces and committees), building on and refining experience with the board structure pilot and refined job descriptions that were approved by the board in February 2022 and implemented in FY 2023.

Action Step 1: Expanding Leadership Development Committee and practices - The President, President Elect, and Leadership Development Co-Chairs will refine the description of the Leadership Development Committee and recruit additional members and mentors by February 2023, and the Leadership Development Committee will provide a progress report to the board by June 2023 on new practices for leadership recruitment, development, and succession planning.

Action step 2: Refining Board, committee, task force and team job descriptions, structures, and JRC By-Laws - By December 2022, the President will appoint a task force (e.g. "Design Team 2.0") consisting of the President-elect, Leadership Development co-chairs, and others to 1) initiate a process to learn from, evaluate and "iterate" the current Board team structure and VP and membership at large role definitions; 2) develop recommendations for committee/team/task force/member roles, with a report back to the board by November 2023; and 3)

propose needed bylaws changes that could be presented to the Board by February 2024, and voted on by membership at the May 2024 annual meeting with appropriate notice in advance.

Action Step 3: Early childhood advisory - VP of Education Robin Byster will work with Micky Baer and Jenna Smith to recruit an early childhood advisory committee to help re-think and grow the program, and will report on plans to the board by January 2023 to pave the way for accurate budgeting

Action Step 4: Kehillah/school parent advisory team - VP of Education Robin Byster and Assistant Rabbi for Education David Eber will support the revitalization of the room parents and Parent Advisory Team to initiate action in spring 2023 and have a cohesive structure in place by Fall 2023.

Action Step 5: VP of Education Robin Byster and youth member Celia Osborn will determine next steps to address the post-B'nai Mitzvah experience such as enhancements to teen lounge, potential collaborations with others such as Shir Hadash, and/or youth-generated programming ideas by February 2023.

Goal 3: Within the next three years, JRC lay leaders and staff will develop and implement membership retention and growth strategies to reach our goal of a 500+ household congregation, in order to sustain a vibrant community that serves and engages our members.

Objective 3.1: Membership Growth - By March 2023, the VP of Membership, VP of Strategic Development, and Executive Director will develop and present to the JRC Board a detailed plan on how the membership goal will be achieved which will include a cohesive messaging approach and may include a marketing campaign, retention strategies, refined dues structure, or other components.

Action Step 1: Brand/Messaging Development - The VP of Strategic Development, VP of Membership, Board President, and Executive Director will work with Jon Rappoport to develop and test a refined brand/messaging concept for JRC and report back to the Board and Marketing Team by January 31, 2023.

Action Step 2: Marketing Plan The VP of Strategic Development, staff, and others TBD will set a schedule to convene the Marketing Team regularly to support development and implementation of the plan.

Action Step 3: Building Sign - The Board, Marketing Workgroup, Executive Director, and others TBD, will determine next steps to have a permanent sign made for the building, and will begin to act on those steps if possible, by the end of December 2022.

Action Step 4: Retention Strategies - The VP of Membership will work with the Leadership Development Committee to recruit Membership Committee co-chairs and a vibrant committee that can sustain ongoing membership retention strategies, guided and supported by JRC's marketing and branding strategy.

Action Step 5: Remote membership - The VP of Membership will work with ED Micky Baer to identify 3-5 current remote members to consult with about how to offer reasonably priced remote memberships to people outside the Chicago area with the aim to market and grow that membership category, and present a proposal for board approval by April 2023 in order to offer a remote membership option in time for 2023 renewal season.

Objective 3.2: Culture of giving - By June 2023, the VP of Financial Development and Executive Director will evaluate JRC's current financial development efforts and identify opportunities to create a culture of giving at JRC by coordinating, strengthening, and integrating these efforts into ongoing JRC communications. The goal will be to raise donation and fundraising revenue to a reliable 20% of total JRC revenue by mobilizing existing members and identifying new ones who will be ongoing ambassadors.

Action Step 1: The VP of Financial Development, with assistance from the Board President, Executive Director, and others, will establish a Financial Development Committee to organize and support JRC's fundraising and financial development initiatives.

Action Step 2: The VP of Financial Development and Financial Development Committee will create an annual calendar of financial development activities, action steps involved, and volunteer engagement needed to achieve each fundraising activity.

Action Step 3: By June 2023, the VP of Financial Development and others TBD will review the donor data system, existing fundraising campaigns, and donor recognition strategies to identify opportunities to strengthen and grow JRC

fundraising efforts.

Action Step 4: By June 2023, the VP of Financial Development and the Financial Development Committee will create a quarterly fundraising review structure and will provide quarterly fundraising progress reports to the Board.

Objective 3.3: Strategic planning and design thinking - By June 2023, the VP of Strategic Development, the Board President, and others TBD will develop a structure to support ongoing strategic planning and design thinking efforts to improve Board function and effectiveness.

Action Step 1: The Strategic Planning Team, with assistance from Irv Miller and Alan Gratch, will develop a method for quarterly review of progress toward Action Steps and Objectives outlined in the FY2023-2026 Strategic Plan, and will provide details of this plan to the Board via email, by the end of December 2022.

Action Step 2: The Board will develop additional Objectives and Action Steps for the FY2023-2026 Strategic Plan at least annually, with a draft of the following fiscal year's Action Plan to be prepared prior to and discussed at the Board meeting in June of each fiscal year with the outgoing and incoming Board.

Action Step 3: The President and the VP Strategic Development will continually assess what additional support or guidance the Board might need from the Strategic Planning Team to successfully develop and implement Objectives and Action Steps for the FY2023-2026 Strategic Plan.