
A STRATEGIC PLAN FOR TEMPLE SINAI

March 28, 2013

18th of Nisan, 5773

Strategic Planning Committee, 2011-2012

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Abstract

This document captures the strategic planning discussions of Temple Sinai in 2011-2012, as we worked to understand our present position and plan for the balance of the present decade. Our overarching motivation is to continue to build Temple Sinai as a place where we can best continue to pursue our mission, rooted in our deepest Jewish values. Our specific task was to set out directions and areas of focus for “intelligent change” in our Temple life. Where are we going and how will we get there? We recognize that Temple life occurs both inside and outside the Temple Sinai building, and that changes take place in the context of the evolving landscape and demographics of Reform Judaism and Judaism generally.

This document provides context for an evaluation of what’s working at Temple Sinai as well as areas for growth and improvement. We set out a roadmap to strengthen and enhance Temple Sinai. Core areas include relationships (within and beyond Temple Sinai), an expanding mix of educational experiences, and a culture of reflective innovation. Operational areas stressed the importance of new means of communication, building our leadership skills, and thinking about the future of our rabbinate, our infrastructure, and our model for financial sustainability.

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1. Executive Summary

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| Hillel used to say: | הֵלֵל תִּיהָ אוֹמֵר, |
| If I am not for myself, who will be for me? | אִם אֵין אֲנִי לִי מִי לִי? |
| If I am only for myself, what am I? | וְכִשְׁאֲנִי לְעַצְמוֹי מָה אֲנִי? |
| If not now, when? | וְאִם לֹא עַכְשָׁיו, אֵימָתַי? |
| Pirkei Avot 1:14 | |

At a time of great change in North American Jewry and particularly in the Reform Movement, Temple Sinai stands strong as a vibrant community living and growing as Jews. Temple Sinai provides opportunities and encourages our members to enhance and transform each other through spiritual connection, learning, and acts of love and kindness for each other and for our community. Temple Sinai does this by creating and sustaining a welcoming, relationship-based community rooted in our deepest Jewish values.

It is our tradition to wish that individuals *go from strength to strength*. As a community, we build on our successes and our strengths.

While strategies and tactics evolve with new challenges and opportunities, we have identified the following values as essential to our continued growth and success:

1. We invest in relationships.
2. We encourage Jewish learners.
3. We embrace thoughtful change.

We have also identified specific operational areas that we believe warrant considerable attention. These areas are important for our wellbeing and are related to our ability to live the aforementioned values:

- A. Build a new financial model for the congregation.
- B. Adjust operating, programmatic and capital plans.
- C. Establish succession and contingency planning.
- D. Develop and evolve methods and content of intra-congregational and external communication.
- E. Enhance the sophistication and quality of our lay and professional leadership and business operations.

Over the coming years, we dedicate ourselves to the specifics—activities, strategies, and measurement—outlined in this plan.

**Presented by the Strategic Planning Committee and
Affirmed by the Board of Trustees
Temple Sinai of Pittsburgh, Pennsylvania**

March 28, 2013

18th of Nisan 5773

2. Goals, Background, Environment, Current State

A. Why a Strategic Plan?

Temple Sinai is far from unique in viewing itself as being at an “inflection point” in its history. Indeed, at the December, 2011, Biennial of the Union for Reform Judaism, a number of key and pervasive topics were discussed—in the formal sessions and informal chats. Among these were the future of Judaism in general, the Reform movement and progressive Judaism more specifically, and each congregation still more specifically.

Congregations seemed challenged by the need to work towards redefining themselves, or at least clarifying their definitions, in the context of the world, their relationship with Israel, and the direction of the Reform movement. These issues are amplified by the societal changes as a new generation succeeds its parents, and the rapid pace of change in means and modes of gathering, moving about, and communicating, fostered by new technologies, the Internet, and social media.

Congregations are also challenged by the need to be financially self-sustaining organizations, while creating a new financial model that is less dependent on dues, consistent with the changing ways of society, especially among young adults.

At Temple Sinai, we are mindful of changing regional demographics, including

- a slowly declining Jewish (and overall) population, in which migration in and out dominates gain or loss through birth and death
- a high mean age (relative to other metropolitan areas)
- a pace of change that is often slow and deliberate, compared to other communities in the United States
- a relatively centralized and urban Jewish population, of which just over 50% are affiliated with synagogues
- a wide variety of Jewish institutions in a relatively small geography, facilitating opportunities for interaction and collaboration

Please see Appendix B for further discussion and observations about some of these factors.¹

In that context, the Strategic Planning Committee undertook to lay out a path for Temple Sinai for this decade: a plan that we call *Sinai 2020*, reflecting literally the time scope of the plan and figuratively our hope to see the future clearly, so that we can manage our course wisely and appropriately. This document presents our collective vision and thoughts, as well as a high-level plan for execution. Specific goals and responsibilities are collected in Appendix A.

¹ Appendix B contains a summary and observations kindly prepared by Joshua Donner—member of Temple Sinai and Planning Director, Jewish Federation of Greater Pittsburgh—for a meeting of the Strategic Planning Committee, November, 2011.

B. “Promises, Promises”

In the midst of our planning process, on Kol Nidre 5773 (September, 2012), Rabbi James Gibson’s sermon reflected on his nearly 25 years at Temple Sinai. He talked about the promises he had made when he first came to Temple Sinai, and his vows for the future.

The promises made that night (excerpted) are below. We believe these promises were made not only by the rabbi, but also on behalf of Temple Sinai’s members. We have integrated them into our work on the final stages of this plan (some indicated in the text below by the number of the promise “**Promise #x**”). (Please refer to Appendix C for Rabbi Gibson’s full sermon.)

1) I vow to find ways for us to become more literate Jews.... This will require looking at source texts, not just book reviews. Authenticity will require more engagement with our Bible, our rabbinic texts, our history and our ethics. If we do not embrace this heritage and make it our own, we risk drifting away from it.

2) I vow to work with you to build a secure financial future for Temple Sinai for the sake of the next generation. As part of this effort, I vow to work to find a way to make this place affordable for you. At the same time I would like to help create a culture where you consider Temple Sinai as one of your highest priorities for giving beyond your annual commitment here.

3) I vow to take a hard look at what are our obligations to the Jewish community at large and the Reform community in particular. We have reached a size and stature that demands that we look at ideas, needs and opportunities in a larger context. We will find ways to collaborate on some issues as we try to avoid costly duplication of services. I vow to work toward this goal without sacrificing our identity or our mission, vision and values.

4) I vow to try to create a “Temple Sinai Shabbat table....” [W]e could have a group of congregants, maybe 3 homes at a time who would welcome others home for Shabbat dinner from services.

5) I vow to ask the question, just how much do we see our Reform identity bound up in refusing to observe hardly any standard of kashrut...? Don’t we have a responsibility to the larger Jewish community whom we often invite to our programs and events to make sure we, as good hosts, provide fare that is available for all to eat?

6) I vow not to take our present success for granted. All success... is temporary at best. Whether because of demographic trends, financial challenges or changes in leadership, it is no sure thing that we will enjoy the success we have built over 25 years. It is our responsibility to look 15 years down the road.... We must ask: How do we best serve our movement of Reform Judaism?

7) I vow to help build a community of younger adults who feel they are charting their own Jewish destiny, not only helping to fulfill ours. This will require new ways of connecting with them, some of them challenging to a standing institution. We must invest in younger Jews....

Oh, and one more vow just for good measure. I vow to laugh and sing more and fuss and fret less.

C. What's Working

In creating this Strategic Plan, we identified aspects of Temple Sinai that we believe are successful. While any area can be improved or even reimaged, the planners felt that the membership is generally happy with our offerings in the following areas:

- a) **Education:** Our programs for school children and for lifelong (adult) learning are well received and quite popular.
- b) **Youth programming:** Our youth show enthusiasm for our various offerings.
- c) **Seniors programming:** Our seniors actively engage in a variety of programs at Temple Sinai.
- d) **Music:** Our music programs, whether formal (e.g. services) or otherwise, receive rave reviews.
- e) **“Flat” structure and lack of hierarchy:** The small size of our staff lends itself to teamwork, both among the staff *per se* and with volunteers.
- f) **Variety of services/worship opportunities offered:** Temple Sinai continues to innovate to offer a wide variety of services and worship experiences (“something for everyone”).
- g) **People:** The people of Temple Sinai—clergy, staff, members—have a much-deserved reputation for involvement, passion for the organization and its activities, and an openness to new experiences, new members, and new participants.
- h) **Good stewardship of resources** (financial and other): Temple Sinai works hard to stretch our financial and physical resources, and continually works to improve our financial stability and underpinnings (endowment).
- i) **Centers:** Temple Sinai’s innovative Centers concept, introduced by Rabbi Gibson, works well and has received national recognition. Our execution—the activities, organization, and leadership of the Centers—continue to mature as the concept develops.
- j) **Individual community involvement:** Member involvement in the community—in Pittsburgh and beyond—is a hallmark of Temple Sinai (including our *Just Congregations* work and other activities).
- k) **Reflection and continual improvement:** Temple Sinai’s approach is “don’t break what’s not broken,” while seeking incremental improvement in all programs.
- l) **Inclusivity:** Anyone wishing to identify as a Reform Jew is welcome, without regard to ethnicity, family structure (including interfaith), sexual preference, or other factors.
- m) **Streaming temple services:** The addition of Internet streaming of High Holiday Services (5773: Fall, 2012) was well received, and has been expanded to all Friday night Shabbat services.
- n) **Professional and administrative staff:** Our staff are continually learning and building their skills. We are proud of the commitment and dedication of our staff, as well as their involvement in Temple activities.
- o) **Life cycle events:** Our lifecycle events receive high praise from both the participants and visitors to Temple for those events.
- p) **Community Justice Activities (*Just Congregations*):** Temple Sinai’s involvement in congregation-based community organizing on a synagogue, local, regional, and national level is strong and recognized across the community for its leadership.
- q) **National and International Involvement:** Temple Sinai clergy and members are involved in and serve in the leadership of national and international Reform Jewish organizations.

D. What's in Need of Improvement or Change

We also identified areas of Temple Sinai that we felt could use work, improvement, revision, or change. These include:

- a) **Temple Sinai's financial model and fundraising approach:** We recognize that, in the long term, a new financial structure will become necessary, based on changing needs and habits of our members. This is strongly influenced by the Internet and new patterns of engagement among younger members of organizations. In addition, we need to continue to focus on enlarging our Fund for the Future endowment. (We note that the current financial model is both an unsustainable "melting iceberg" and an opportunity for positive change.)
- b) **Building centrality:** No longer should it be assumed that Temple Sinai activities take place only or even principally in the Temple building. We see new patterns of participation and engagement emerging, especially among younger generations, and need to respond with innovative offerings and adjustments in our capital plans.
- c) **Volunteerism:** Volunteerism creates leverage. We believe that greater volunteerism is important for engagement and stability as well as for financial reasons (supplementing staff). Members should be better recognized and appreciated for monetary and non-monetary contributions. An array of volunteer positions should be institutionalized.

We suggest creating and documenting an organizational model/process, including organization charts for both staff and volunteers. We also see a need to encourage volunteerism through more recognition for contributions of all kinds. We believe that this requires cultural change.
- d) **Risk of Rabbi "over-dependency" (and need for succession plans):** The congregation relies on the Rabbis and Cantorial Soloist for creativity, innovation, and culture. We need to identify and cultivate additional resources, including a broader range of lay leaders. A succession plan is important for rabbinic retirement and for unforeseen circumstances.
- e) **Follow up, follow through, and evaluation:** Temple Sinai could be better at ensuring execution (and completion, where appropriate) of initiatives and programs in a timely fashion. We lack a culture of accountability and an intentional approach to gathering information on successes, failures, and overall congregational needs, as they evolve.
- f) **Engagement:** Temple Sinai needs to continue to expand its outreach to the next generation of Reform Jewish leaders and members of the Pittsburgh community. We discussed the idea of "Radical Hospitality." Engagement needs to be especially focused on (a) next generation Jews—"emerging Jewish adults"—seeking an appropriate level of commitment, (b) retention of adults after their children become B'nai Mitzvah, are confirmed, or graduate from high school, and (c) the Pittsburgh Jewish Community (including other synagogues, other Jewish organizations (health, education, services)).
- g) **Collaboration:** The principle of collaboration with other Jewish institutions should be endorsed, actively pursued, and become more fundamental to our activities. Not all collaborations will be successful, but that should not deter Temple Sinai from trying and experimenting.
- h) **Greater understanding and appreciation of U.S. and worldwide Reform Jewish organizations:** Temple Sinai needs to have an enhanced understanding that we are part of a larger Reform Jewish world and increased knowledge of Reform Jewish organizations.
- i) **Support for Israel:** As a pillar of Reform Judaism, Temple Sinai needs to increase its support for Israel as a just, pluralistic, and democratic Jewish state.

3. Core Precepts

A. Vision, Mission, and Values

Temple Sinai is a Reform Jewish congregation in the Squirrel Hill neighborhood of Pittsburgh, affiliated with the Union for Reform Judaism. Temple Sinai's **vision** is to be a place where Jews live and grow as Jews by creating and sustaining a welcoming, relationship-based, community rooted in our deepest Jewish values.

Our **mission** is to enhance and transform each other through spiritual connection, learning, and acts of love and kindness for each other and our community.

Temple Sinai's mission is founded upon **core values**:

- We live as a family that embraces God, Torah, and peoplehood and is committed to a progressive view of all three.
- We embrace diversity among all who enter our community. This includes embracing interfaith families, same-sex families, those who live with disabilities, as well as those from differing ethnic backgrounds. We celebrate our differences even as we affirm our unity in God, Torah, and with Israel.
- We help all in our midst to grow, explore, and live as Jews so they can fully participate in Jewish spirituality, caring, social justice, and learning both at Temple Sinai and in the larger Jewish community, including Israel.
- We care for each other through acts of mutual responsibility as well as acts of love and kindness. Our goal is that those forming a commitment to Temple Sinai be comfortable in lending a hand as well as receiving help when in need.
- We commit ourselves to the ongoing vitality of Israel as a Jewish state and celebrate our relationship with Israel through visits, study, and shared experiences. We pledge to work in partnership with ARZA (Association of Reform Zionists of America) and our Reform brothers and sisters in Israel to promote the values of tolerance and Jewish diversity in order that Israel live up to its promise to be a homeland for all Jews, regardless of their practice of our faith.
- We accept responsibility for "repairing the world" consistent with the Torah's call for a just society (*tikkun olam*). We are guided in this activism by our understanding of the demands of our faith.

B. Value-based Areas of Focus

We have identified the following value-based areas of focus as essential to our continued growth and success:

1. **We invest in Relationships.** By creating real and meaningful “circles of intimacy,” we attain a depth of engagement that provides spiritual growth and a real and meaningful sense of Jewish peoplehood—*k’lal Yisrael*. We also know that our success as a congregation is unequivocally tied to the strength of Jewish Pittsburgh, the Reform Movement, and the Jewish people. We are welcoming, in a broad sense. We invest in relationships by:
 - Creating and nurturing circles of intimacy among our members,
 - Embracing and empowering our congregants as they strengthen Jewish relationships outside of Temple Sinai, and
 - Seeking strong and mutually beneficial relationships with other Jewish organizations to achieve a shared vision for our community.

2. **We encourage Jewish learners.** Being Jewish includes the study of what it means to be Jewish. The way we approach education has changed radically over the past two decades. Yet our commitment to finding opportunities for Jewish learning and its centrality in our lives has not wavered. We encourage Jewish learning by:
 - Ensuring educational opportunities are available to meet the needs and desires of every Temple Sinai member who seeks to learn about his or her Judaism,
 - Embracing experiential, holistic, and non-traditional approaches to learning in addition to traditional modalities,
 - Creating quality learning environments that are engaging, meaningful, and enjoyable.

3. **We embrace thoughtful change.** Building on our Reform tradition, we live in a state of constant change. We know that change can be difficult, and that new ideas sometimes fail. We believe that change, coupled with thoughtful planning and reflection, is necessary for Temple Sinai to maintain strength and relevance. We embrace change by:
 - Respecting tradition, while being open to new experiences,
 - Investing boldly in building an institutional culture that allows failure with the expectation that we are thoughtful enough to learn from it, and
 - Being aware of the evolving nature of “community” and being flexible to meet the current and future needs of our members.

C. *Operational Areas of Focus*

In addition, we have identified specific operational areas that we believe warrant considerable attention. These areas are important underpinnings for our ability to live our values:

- A. **Build a new financial model for the congregation.** Temple Sinai will generate revenue in a way that allows programmatic decisions to be driven by mission and not only by financial constraints. In a world of increasing economic inequality and diminishing importance of membership as a paradigm for Jewish engagement, we also aim to align revenue collection with our values and with evolving economic and social realities.
- B. **Adjust operating, programmatic and capital plans.** Temple Sinai will modify its operating, programmatic, and capital plans to reflect congregational changes in thought and behavior, from a place to a people. Temple Sinai exists in activity and concept beyond the walls of 5505 Forbes Avenue—this must be reflected in our plans for our physical plant and infrastructure.
- C. **Establish succession and contingency planning.** Temple Sinai will plan for contingency and succession in Rabbinic leadership, as well as other vital professional and volunteer leadership.
- D. **Develop methods and content of intra-congregational and external communication.** Temple Sinai must evolve its methods of communication with a focus on flexibility in a rapidly evolving social media world. We must use diverse means of communication as a vehicle to strengthen relationships and partnerships.
- E. **Enhance the sophistication and quality of our lay and professional leadership and business operations.** Temple Sinai must continue to educate our leaders and raise the goals and expectations for how our leaders lead. We must set high standards for leadership, governance, and business operation performance.

4. 2020 Plan: Core Values

How can we best execute and achieve the vision as we move towards the year 2020? What should we focus on? What are (and should be/will be) the key strengths and differentiators in our offerings?

How can we continue to build affinity and open doors to Judaism? What are the core values that are supported by opportunities and operations?

Value 1. Relationships

[The Strategic Planning Committee believes this to be strategic priority #1.]

[Promises #3, #4, #7]

[Areas in need of Improvement: f, g, h, i]

- Circles of Intimacy
- Relationships beyond the Congregation
- Institutional Relationships

Direction: While relationships within the Temple Sinai congregation will continue to be important, relationships with other Jewish organizations—local, national, international—will strengthen Temple Sinai. Increasingly, people neither identify with nor satisfy their interests within a single organization. Nor is it financially practical for Temple Sinai to be all things to all of its congregants. Temple Sinai can enrich its offerings and augment its (financially constrained) capacity by creating new community relationships.

Our relationships include those “inside” and “outside”, i.e. with members, our community, our region, Israel, and the world.

We strive to meet people where they **are**: physically, emotionally and spiritually.

We are **welcoming** in a broad sense: to young and old, rich and poor, gay and straight, traditional and non-traditional families.

We recognize and support those in our community with special needs: physical, psychological, and familial.

We meet people in a spirit of engagement and deep interaction.

We recognize that engagement does not end when people part physically, but rather that follow up and continual engagement are a key part of any relationship.

We keep our members and relationships at the center of all that we do.

Strategic Vision

Temple Sinai will strengthen and enrich our Family of Families, by connecting our members to Jewish spirituality, and by enabling our members to establish connections and engage with each other through Jewish experiences, education, life cycle events, socials, and *chavurot*, thereby creating Circles of Intimacy within the Temple Sinai Family.

Temple Sinai will open its doors to all, regardless of affiliation (or lack of affiliation). Likewise, Temple Sinai will welcome opportunities to participate in services and programs of other Pittsburgh congregations—Jewish and those of other faiths.

Relationships with other Jewish organizations—local, national and international—will strengthen Temple Sinai. We recognize that collaborations **are** relationships, based on building mutual trust. In this vein collaborations in the community are vital both to us and to building our community. As we build collaborative relationships, it is important to understand those that we have and to communicate to others what we are doing: how are we helping the community and each other?

We strive to look continually for “win-win” opportunities. What do we offer others; what do they offer us? We are open to the possibilities of new relationships and programs based on a shared vision. We recognize that it is important to participate in discussions on collaboration, even if the right answer is sometimes not to proceed with a proposed activity. We learn from each experience.

Approach/Operating/Executing/Putting the Strategic Vision into Action

- Temple Sinai will offer a wide variety of opportunities for its members to engage with each other in intimate, meaningful, innovative traditional and experiential opportunities. These will include congregation-wide and large-group experiences as well as smaller gatherings.
 - Temple Sinai will offer an array of opportunities for small groups to gather in “Circles of Intimacy,” what are sometimes called *chavurot*. These circles will often emerge from the Neshama Center for Jewish Spirituality, the Midrash Center for Jewish Learning, the B’racha Center for Jewish Connections, and the Tikkun Olam Center for Jewish Social Justice. Circles may be formed for things such as studying Talmud, baking Hamantaschen, a Tu-Bishvat Seder, or whatever transforms our vision of circles of intimacy into reality.
 - Temple Sinai will offer opportunities for larger groups to choose among different observances of Jewish holidays and life cycle events. For example, in addition to the traditional Rosh Hashanna service in the sanctuary, other, very different Rosh Hashanna services might be conducted at a different venue, away from the Temple building. Again, such opportunities will emerge from the four Centers and will transform the vision into reality.
- Temple Sinai will collaborate and partner with innovative local, national, and international organizations to
 - Enable and encourage our members to participate together in community activities;
 - Enrich and expand what we can offer to meaningfully engage Temple Sinai members;
 - Expand our opportunities to participate with distant organizations, including Israeli congregations and organizations and the World Union for Progressive Judaism, through virtual means; and
 - Expand our scope of influence.
- Where practical, our collaborations will help enhance Temple Sinai’s capacity, relative to our financial resources.

Measures of Success

- **Traffic:** Increase foot traffic in the building and elsewhere: participation in Circles of Intimacy; convert high barriers to low barriers through welcoming and relationship building.
- **Volunteerism:** Increase the level of volunteer work on Temple tasks, augmenting our hard working staff. Lay leaders take responsibility for programs with relatively minimal support from the professional staff. Members engage other members in activities.

- **Engagement “in:”** Aim for at least 70/30 participation (i.e. 70% of our approximately 900 households and 1800 individuals). Increase intensity and frequency of participation in our programs. Create connections specifically around each Center and Auxiliary.
- **Engagement “out:”** Build our level of engagement and collaboration with other organizations—Jewish and otherwise, Pittsburgh and beyond—consistent with our vision, mission and values and so as to enhance Temple life for us.
- **Covenant:** Create, implement, and live a “Covenant” of membership. Sharpen the ways in which we see our “Circles of Intimacy.”
- **Self-evaluation and accountability:** Create and use methods (that are not onerous) to measure our programs and events with respect to our overarching goals, as well as the follow up and completion (by organizers and staff) relating to these programs and experiences.

Specific Goals, Implementation, Owner

See Appendix A.

Value 2. Jewish Learners

In addition to formal education, we focus on learning *outside of the formal classroom* to provide a Jewish experience that is meaningful. (This includes learning outside of the “four walls” of Temple Sinai).

[Promises #1, #3, #4, #5]

[Areas in need of Improvement: b, f]

- Congregation of Learners
- Abundant, quality programming
- New approaches to learning
- Quality learning: “intimate, intense, and authentic”

Direction: Informal Education will be an increasingly larger part of lifetime learning. Informal education, unlike a formal lesson in a classroom, involves experiences outside the classroom either as a substitute for or in addition to didactic readings, lectures and/or discussion. Examples of current informal education programs—“experiential” Jewish learning—are Mitzvah Day, the 92nd Street Y broadcasts, the Religious School class going to the Giant Eagle to buy items for the Food Pantry, a visit to the Holocaust Museum, the Confirmation Class Retreat, Bar/Bat Mitzvah Seminars/Retreats, Sinai Under the Stars Teen Weekend...

Strategic Vision

Temple Sinai will open doorways to Jewish learning through a variety of engaging, meaningful, and enjoyable experiences. These experiences will help us grow as individuals and as a community in the broadest sense.

Approach/Operating/Executing/Putting the Strategic Vision into Action

- Temple Sinai will continue to strengthen and enhance its religious school and other didactic lifetime learning opportunities.
- Temple Sinai will engage its members in an array of meaningful learning experiences—such as retreats, 92nd Street Y, field trips—both inside the Temple and outside, in the larger community.
- Temple Sinai will increase offerings of retreats to maximize “peak spiritual experiences” and learning.

Measures of Success

- We offer intentional, informal experiences that are innovative, broad based, and relevant.
- We continually increase our level of engagement through these experiences with Temple Sinai members and non-members.
- In our experiences with members and non-members, we strive for intimacy, intensity, and authenticity, while living and promoting our values.

Specific Goals, Implementation, Owner

See Appendix A.

Value 3. Change and Innovation

[The Strategic Planning Committee believes this to be strategic priority #3.]

[Promises #2, #4, #5, #6]

[Areas in need of Improvement: b, e]

- Balance tradition and innovation
- Allow “good” failure
- Culture of self-reflection and self-evaluation

Strategic Vision

Temple Sinai will continue to be a progressive congregation. It will continue and evolve effective long-standing practices, experiment with new ones, and discontinue those that are no longer worthwhile.

While seeking to be relevant and responsive to its members as well as cognizant of evolving progressive Jewish trends, Temple Sinai will always respect its traditions and meet its fiduciary responsibilities.

Responsible failure will be acceptable. New ideas will be welcome and pursued after careful reflection. Self-evaluation will be a part of the Temple Sinai culture. In addition to assessing specific programs and practices, Temple Sinai will consider their effect on broader issues such as financial sustainability, over-programming, and mission creep, etc.

Hence Temple Sinai’s culture will encompass progressiveness as well as self-reflection and self-evaluation. (It should be noted that this section is more concerned with “attitude” than with specific initiatives, efforts, and programs, which are covered in other sections.)

Approach/Operating/Executing/Putting the Strategic Vision into Action

- We will work to instill an attitude of innovation, consistent with our vision, mission and values.
- Clergy, staff, and lay leaders will continually evaluate the merits of current programs and practices. Some will be continued; some substantially modified; others eliminated. New programs and activities will also be introduced. Change will be considered with a view of what might be lost as well as what might be gained.
- Each proposal will be fully explained with due consideration of staff obligations, congregant engagement, financial impact, effect on established programs and practices, measures of success, and other appropriate considerations. Programs will be evaluated periodically and adjusted as appropriate.
- Temple Sinai will take advantage of the support, programs, and ideas offered by the Union for Reform Judaism (URJ), and its affiliates (WRJ, MRJ, and NFTY)—and of partnerships with other Pittsburgh-area organizations—where they help Temple Sinai reach its goals and where they offer best practices as well as being beneficial to the other organization.

Measures of Success

Specific measures of success are addressed in other sections or with new programs to be introduced.

Specific Goals, Implementation, Owner

Further to this idea, specific goals and tasks are in other sections. See Appendix A.

5. 2020 Plan: Operational Priorities

A. *New Financial Model and Foundation for the Congregation*

[The Strategic Planning Committee believes this to be strategic priority #2.]

[Areas in need of Improvement: a]

[Promises #2, #6]

Direction: The current financial model, relying upon dues, endowment, and multiple fund raising projects will, of necessity, change. Knowing how and what to change remains a challenge for Temple Sinai and many other congregations. It is of no comfort, of course, that others face this predicament, but our plan is to explore new directions for ourselves, while watching the work of other congregations.

In addition, we need to continually reexamine and reevaluate issues of fairness. For example, any evolution of the current dues structure should consider the implications for our efforts to engage new members, especially young members who are not yet financially established. The issues include:

- The future of dues as a means of funding what we do;
- Role and size of our endowment;
- Fundraising *per se*; and
- The need to develop and evolve financial policies to ensure that members and non-members fairly share the cost for relevant activities.

Strategic Vision

We propose to develop a 5- to 10-year plan for evolving the methods and mechanisms for supporting ourselves in the context of growing membership, growing activity level, growing engagement, and a growing role in and into the community. In the meantime, continuing to grow our Endowment—*The Fund For the Future*—will help ensure a permanent platform that provides more stability and flexibility for the changes to come.

Approach/Operating/Executing/Putting the Strategic Vision into Action

Two efforts arise from this section. First, we will continue work to build the Endowment, under the direction of the Development Committee. Second, we will reexamine our funding model, both tactically (our dues structure *per se* based on family categories and ages) and strategically (under the assumption that dues will not be the principal method for supporting congregations in the medium- to long-term).

Measures of Success

Success comes from:

- Continuing growth in the *Fund For the Future* Endowment. Our *This Is the Time* Campaign is currently completing Phase I, with a goal of \$3 million in pledges to fund The Rabbi James A. Gibson Fund for Jewish Life at Temple Sinai.
- Tactically re-examining our dues structure (especially young families, as we encourage them to join).
- Re-envisioning our funding model for Temple Sinai as a whole, and beginning a gradual shift towards a newly envisioned scheme.

Specific Goals, Implementation, Owner

See Appendix A.

B. From Place to People: Evolution to a “Hub”

[Promises #3, #4, #5, #6, #7]

[Areas in need of Improvement: a, b, c, f, g]

Direction: The Temple building will be a hub, not the locus of all activities. As informal education and community relationships expand, more activities will occur outside of the building as well as through virtual communications.

Strategic Vision

“Temple Sinai”—the building at 5505 Forbes Avenue—is evolving and will continue to evolve into a hub, rather than the place where nearly all activities are held. Informal, experiential education and community relationships provide an opportunity for a greater number of activities to take place outside the walls of the building and through virtual means. The building-as-hub will be employed as appropriate to help strengthen our identity and connections.

In a sense, "Temple Sinai is wherever at least one member of Temple Sinai is!"

Approach/Operating/Executing/Putting the Strategic Vision into Action

For both new and existing activities, we will consider the appropriate venue more broadly, considering other locations in Pittsburgh (for example the JCC, the Carnegie Museums, the parks in Pittsburgh) and elsewhere. A key example is connections via campus Hillels to our college-age members.

In addition, we will more strongly get out the message that Temple Sinai is wherever its members (and friends) are.

Also, we will consider the long-term plan for the building at 5505 Forbes Avenue: both the “business as usual” maintenance aspects (replacing aging equipment, for example) and what we might do for expansion and other uses as resources allow. This plan will include consideration of the uses of the property adjacent to 5505 Forbes (currently a rental property). However, plans for expansion must be carefully developed with an eye towards the use of other locations and venues *in lieu* of 5505 Forbes and the resulting change in usage patterns of our hub.

Measures of Success

We envision:

- More events at venues other than 5505 Forbes. Note that some events are already occurring at other locations. We have been holding Shabbatons and Religious School retreats and activities at other locations for a number of years. During the High Holidays 5773 (Fall, 2012) we held Rosh Hashanah Children’s Services at the Jewish Community Center and, with JBurgh, a New Year’s Eve Young Adult Event at the Carnegie Museum Cafe. Shabbat Babayit gatherings have been organized at members’ homes. Use of these additional sites was well received.
- Greater engagement in and through virtual/on line media, activities, and events.
- The spirit of Temple Sinai being wherever members gather for worship, community, or friendship.

Specific Goals, Implementation, Owner

See Appendix A.

C. Succession and Contingency Planning

[Promise #2, #6]

[Areas in need of Improvement: d]

Direction: Planning for Rabbi Gibson's succession (after he retires) must begin, even though Rabbi Gibson plans to continue to serve Temple Sinai for the next eight to ten years. The culture and practices that were begun during the tenure of Rabbi Gibson should be reviewed to determine which are truly core to Temple Sinai—and to our mission, vision, and values—and which are specific to his rabbinate. Some of these will be obvious, but a deliberate and deliberative review—including practices that are spiritual, musical, and secular—will help us plan for the future.

In addition, as we plan for succession, we need to be mindful of the need to encourage a successor senior rabbi to bring his or her own leadership, style, practices, and preferences to our congregation.

Finally, consistent with good practice, in addition to planning for eventual succession, a plan should be in place as soon as possible for unforeseen issues with all key employees (including the senior rabbi) and all core functions involved in day-to-day operations.

Strategic Vision

Temple Sinai will continue to BE TEMPLE SINAI (a Reform Jewish congregation in Pittsburgh, affiliated with the Union for Reform Judaism).

Approach/Operating/Executing/Putting the Strategic Vision into Action

The Executive Committee will initiate a succession and contingency planning project.

Measures of Success

A successful effort will result in:

- an actionable contingency plan, and
- the outline of a plan for finding a successor when the time comes.

Specific Goals, Implementation, Owner

See Appendix A.

D. Communication: Old Media, New Media, and the Future

[Promises #3, #7]

[Areas in need of Improvement: f, g]

Direction: Communication technology, patterns, and customs are evolving rapidly, with the younger generation(s) at the cutting edge of use. The Internet has enabled ways of communicating that were unforeseeable twenty, ten, or even five years ago. The proliferation of new media is enabling more timely, wider information dissemination and engagement. Temple Sinai must seek to be on the leading edge of communication among religious organizations. Our knowledgeable, progressive membership requires it, and our desire to reach young people demands it—they won't necessarily listen to more traditional means of communication (even as those means, in some cases, fight for survival). We must also keep in mind, however, that some of our constituency has **not** adapted to the Internet and to media of the twenty-first century, whether email, social media, or otherwise. When we consider our communication, we mean both within our congregation and to other in our broader community and the world.

Strategic Vision

Traditional media—printed bulletins and flyers, for example—serve a useful purpose in reaching some members of our congregation. Likewise, the use of email has expanded and should be used in an increasing—and increasingly effective—way. At the same time, we need to reach people in the way they want to be reached—necessitating our creative and clever use of “new” media and new platforms.

Temple Sinai must therefore explore how to effectively use social media both within and outside the congregation. This effort includes continually growing understanding—and, perhaps harder, keeping up with **changing** models—of channels and media, methods of communication, timing and new “news cycles,” the differing methods for internal vs. external communication, and up-to-date use of computing and communication platforms and social media (as those rapidly change).

We also need to expand beyond significant reliance on word of mouth within our community, as the needs of our “listeners” expand.

Finally, and fundamentally, it remains important to communicate in person, in small or very small groups. Our work on Just Congregations provided a good example of how this can work. We continue to utilize small groups in our Listening at Sinai Campaign.

Approach/Operating/Executing/Putting the Strategic Vision into Action

The Temple Sinai Marketing department has recently made significant progress in the use of new media, including a new web site (High Holidays, 2011), a revamped email facility and strategy, and streaming services.

The Marketing department will enlist the advice of a Marketing Committee to look at additional methods of communication and to define ways of measuring the success. We realize that different members and families in our congregation find different means of communication most effective; we will respect the preferences of our members as to the most effective methods for each of them. (We also observe that there is a correlation of method preference with generational trends.) We will also use multiple methods to communicate with the community beyond our membership.

We will also consider next steps for our on line membership system, which is relatively new.

Measures of Success

A number of measures of success are already in place, including the percent of the congregation that has provided email addresses, that reads our electronic communications, and that uses our on line membership system.

These are measures of the success of our current tactics. Broader measures of success include metrics to understand whether we are effectively using of all of the communication tools at our disposal to increase engagement and relationships.

Our follow up will include the definition of metrics to look at the relationship between our marketing and communications *per se* and overall relationships and engagement at and with Temple Sinai.

Specific Goals, Implementation, Owner

See Appendix A.

E. Leadership and Business Operations

[Promises #1, #6, #7]

[Areas in need of Improvement: a, c, d, e]

We believe that both our professional and lay leadership must continue to evolve. The operation of our Temple, and surrounding “environmental factors,” including an increasingly savvy and demanding membership, require us to continually build and sharpen our skills to effectively serve our members.

Strategic Vision

Temple Sinai has recently begun to augment and change its professional leadership to support the Centers, lifelong learning, and informal education, focusing our efforts on “raising the bar” among the staff leaders of these key areas. We view an increased commitment to augmenting our relationship building skills as key to our continued success. This commitment must be implemented with specific programs and actions. To be clear, the relationships involved are of all sorts—in person, other direct relationships, and virtual relationships—and include relationships both within and outside the congregation.

Lay leadership likewise should evolve, perhaps by establishing additional specific (unpaid) jobs for volunteers. Currently Temple officers and some Board members have designated positions with defined responsibilities (some specified in the By Laws). Each Board member should have a specific “portfolio” of responsibilities. Better-defined roles—that are a fit with each Board member’s skills and circumstances—will lay groundwork for reviewing the best model for governance of Temple Sinai.

Additional lay positions—with specific job descriptions and qualifications—should be created. These might include *zedees* and *bubbies* to help with youth programming, liaisons with selected organizations, new member outreach, and so forth. Each position would have a clearly defined scope and goal, include measurable objectives to the extent feasible, and require a commitment—a promise—as to time, responsibilities, and objectives by the person taking the position (recognizing that these may vary from individual to individual).

Approach/Operating/Executing/Putting the Strategic Vision into Action

- Create education and mentoring opportunities to increase the knowledge and leadership skills among both paid staff and volunteers.
- Review: is our staff structure set up to execute our mission?
- To better engage and empower each Board member, each will have a set of responsibilities. We will monitor the fulfillment of these responsibilities and the effectiveness of this plan.
- Increase volunteer / lay leader involvement in mutual “service”—Temple Sinai will create specific (unpaid) jobs for volunteers. We will provide feedback and support for these roles.
- Temple Sinai staff will build virtual and direct relationships with the staff of other local, national, and Israeli organizations.

Measures of Success

- Better educated and more effective lay leaders and aspiring leaders.
- Increased volunteerism, as measured by breadth of volunteer jobs and participation.
- Results of staff reviews.

Specific Goals, Implementation, Owner

See Appendix A.

6. Conclusion

We believe that this document and plan reflect a clear-eyed assessment of Temple Sinai. We have tried to capture areas of current strength as well as areas that need focus and work as we move through the second decade of the 21st century.

In some cases, these areas of focus derive from our own situation—areas where we aspire to build, to improve, to do better. In some cases, they are based on our attempt to look down the road, to assess trends in the communities in which we exist—in our neighborhoods, in the Pittsburgh area, and in the Jewish world, especially (but not exclusively) in the United States and Israel. These are trends that face not only us, but also other congregations, in and outside the Reform movement. They are trends that we want to proactively anticipate.

It is our hope that this document—in addition to providing the framework upon which we will move forward towards 2020—will give the reader some sense of our thinking and of the reasons for our recommendations for strategic areas, as well as the specific recommended actions to take in addressing them.

Perhaps one of our committee members captured it best when she suggested that we must undertake “intelligent change” while remaining true to our mission and values—core ideas that make us Temple Sinai.

Appendix A. Specific Execution Plan

Specific Goals, Implementation, Owner

Notes: This is an initial list developed by the Strategic Planning Committee. When the plan is initiated, more specific responsibilities will be assigned and a timetable developed. As part of our process we will periodically evaluate progress, assess the list, and modify and redirect as appropriate. An early task will be to develop a method of reporting on and monitoring progress. Also note that several of the goals below might fit under more than one category, so one has been chosen for each.

| EXECUTION PLAN 2020 | | | | | |
|---------------------|------------------------|--------------------------------|---------------------------------------|-------------------------------------|---|
| Core Values | Relationships | | Jewish Learners | | Change and Innovation |
| | Operational Priorities | Financial Model and Foundation | Place to People: Evolution to a "Hub" | Succession and Contingency Planning | Communication: Old Media, New Media, and the Future |

4—Value 1: Relationships

| Goal | Description | Responsible |
|-----------------------------|---|--|
| Measuring "happiness" | Understand the current state as a baseline, using the current "Listening at Sinai" initiative. Produce a survey report of Listening at Sinai, capturing members satisfaction, hopes, and desires. Based on the conclusions of the report, develop a plan to improve happiness and respond to members' hopes and desires; include ways to measure success. | Listening at Sinai group (Note: follows end of Listening at Sinai) |
| Covenant of Membership | Describe, in a document, what it means to be a member of Temple Sinai, and specifically expectations of and by members. | Committee organized by President |
| Covenant with the Community | Similarly, describe expectations for the relationship between Temple Sinai (and our members) and the community, building on the Covenant of Membership. | Same committee, follow on work |
| Event Evaluation | Create an event evaluation sheet for organizers and participants containing an | Program Director, Director of |

| | | |
|-----------------------------|--|---|
| | “Event 4 Questions” (or other specific measures, depending on event type) as well as requiring a summary. | Informal Education, and committee of members |
| Community Relationships | Catalog of relationships: create a high-level “directory” of relationships that Temple Sinai has (organizationally) with the community (Pittsburgh, Judaism, and beyond, including URJ, WUPJ, etc.); describe the organization, nature of relationship, status; develop a strategic plan setting forth principles to be used and factors to be weighed to evaluate relationships, both existing and prospective. | Director of Lifelong Learning, Director of Informal Education, others |
| Community Relationships, II | Two years later, revisit the directory and evaluate progress. | Senior Rabbi, Executive Committee |

4—Value 2: Jewish Learners

(Note: we focus, in these goals, on informal and participatory learning; a similar structure already exists for our formal learning.)

| Goal | Description | Responsible |
|------------------|---|---|
| Status/Inventory | Create an inventory of our existing informal and participatory experiences. | Director of Lifelong Learning, Director of Informal Education, Program Director |
| Model | Create an overarching model for understanding how informal experiences should and do work at Temple Sinai and for evaluating their success. The model should include objective (data/statistics) and subjective measures on the experiences as a baseline for growth and improvement. | Director of Lifelong Learning, Director of Informal Education, Program Director |
| Expand | Following the model, build a roadmap for additional programs and evaluate their success based on the model. | Director of Lifelong Learning, Director of Informal Education, Program Director, others |
| Coordination | Create clear expectations for program implementation, in concert with messaging and marketing. | Program Director, Marketing/Communications Manager, Senior Rabbi, Marketing Committee Chair |

4—Value 3: Change and Innovation

Further to this idea, specific goals and tasks are in other sections. A key theme is evaluation and metrics for our programs.

5—A: New Financial Model and Foundation for the Congregation

| Goal | Description | Responsible |
|-----------------------------------|---|--|
| <i>This Is The Time</i> (\$6-10M) | End Phase I (\$3M+) Begin Phase II (additional \$3M) | Development Committee, Board (Note: Phase I completed spring 2013) |
| Dues Structure | Re-examine dues structure and levels... | Board task force with Treasurers |
| Long-term Financial Model | ... then develop, model, and work on execution plans for new financial models | Same/expanded Board task force with Treasurers |

5—B: From Place to People: Evolution to a “Hub”

| Goal | Description | Responsible |
|---------------------------|---|---|
| New venues | Explore scheduling events for all ages and interests at places other than 5505 Forbes, where it makes sense. As a baseline, measure events during Fiscal Year 2013. | Each Center (Note: already begun) |
| “Temple Sinai Everywhere” | Messaging around Temple Sinai being where its members are (for whatever reason). | Marketing to solicit and promote stories and messages |
| 5505 Forbes | Assess the strategic (not routine or maintenance) changes that we should or would like to make. Create priorities and a roadmap for the changes, subject to availability of funding. | Facilities Committee, Executive Committee |

5—C: Succession and Contingency Planning

| Goal | Description | Responsible |
|---------------------|---|---------------------|
| Contingency Plan | Plan for filling in, in cases of emergency. | Executive Committee |
| Succession Planning | Outline plan for finding a successor when the time comes. | Executive Committee |

5—D: Communication: Old Media, New Media, and the Future

| Goal | Description | Responsible |
|----------------|--|--|
| Define metrics | Measure 2-5 aspects of the relationship between marketing/communications and relationships/engagement. | Marketing Manager and Marketing Committee Chair |
| Execution Plan | Develop plan for additional strategic marketing and communications, including required resources and budget, methods for implementation and metrics for success. Communications includes engagement as well as “getting the word out.” | Marketing Manager, Marketing Committee Chair, along with reps of relevant groups (e.g. Facebook/Twitter users) |

5—E: Leadership and Business Operations

| Goal | Description | Responsible |
|--------------------------------------|---|--|
| Leadership Education | Series of sessions to provide leadership knowledge and skills to leaders and aspiring leaders, both paid and volunteer. | President, Past President, Director of Lifelong Learning, Midrash Center (Note: begun with Leadership Retreat, 9/6/12) |
| Board Responsibilities and Structure | List of portfolio of responsibilities for each Board member. Assessment of fulfillment of responsibilities and effectiveness of this plan. | President and Executive Committee |
| Staff Organization | Assessment with individual reviews. | President, Senior Staff, Executive Committee |
| Staff Organization, II | Recommendations and plan for new organization (if warranted by assessment) | President, Senior Staff, Executive Committee |
| Plan for Increasing Volunteerism | Provide volunteer help for the work of Temple Sinai, specifically: - List of volunteer “jobs” - Plan for engagement of members (Note: this may provide a development path for lay leadership.) | List: Executive Director and Executive Comm. Engagement: B’racha Center |

Appendix B. Joshua Donner's "Facts, Issues, and Trends in the Jewish World"

Prepared by Joshua Donner for

Temple Sinai Strategic Planning Committee

November 6, 2011

Discussion: Facts, Issues, and Trends in the Jewish World

Intro/Background

- Plan: Walk (rush?) through facts, topics, and occasional opinions collected to inform, prompt discussion. Important that we categorize and qualify our statements – are we presenting facts? Opinions? Observations? Feelings?
- Jump in if you agree, disagree, have more information to share, have thoughts about implications for Temple Sinai. This is a discussion, not a presentation.
- My biases: Progressive Reform, Jewish Federation, Steven Cohen (view, not answers)
- Rita will keep us focused on (a) getting through material and more importantly (b) How this relates to Temple Sinai's future.
- Citations available for sources, further reading, etc. – email or see me after.

Pittsburgh's Jewish Community

Population (2002 Community Study)

- 54,000 people living in Jewish households / 42,000 self-identified Jews
- 21,000 households
- 6,400 students K-12 (about 500 per grade)
- 47% live in "greater squirrel hill"
- Between 1984 to 2002:
 - # Jews declined 6% (Allegheny County declined 12% in same time)
 - Number of households, people in Jewish households increased
- 48% under age 40
- 40% of age 22-39 moved to Pittsburgh in prior 10 years
- 1 in 5 Jewish households "struggling to make ends meet"
- 8,400 seniors: 1 in 3 HH, 50% "vulnerable", 30% live alone, 14% no adult child in area

On Population Change

- No current data on the Jewish Community. *Assume we follow Pittsburgh patterns.*
- Population change is a function of three factors: Births, Deaths, Migration.
- Where in the early 1980s we were losing 50,000 people a year to migration – mostly from young, working families – we are now losing a net 5,000 per year to migration. *The early 80s imprinted on collective psyche, still driving behavior 30 years later!*

- “Natural” population change (i.e., rate of death exceeding rate of birth) masks trends in population change through migration (i.e., young families moving in, out).
- Migration more about “turnover” than net change. That is, the replacement of ~100,000 people each year has more impact on our community than net 5,000 loss.
- Within migration (net and turnover), relocation of seniors to Florida/Arizona is a factor.
- Still net losing young families to Washington D.C., Philly, and other cities.
- *Best professional guess: Acknowledge time-limited impact of seniors; View new young families as source of strength, regardless of net loss. Whether new young families actively engage in Jewish life or our institutions is another question...*

Behaviors: Jewish cultural, observance

- **Synagogue Affiliation:** 53% (similar to other major cities)
- **Marriage:** 51% in-married, 13% conversionary in-marriages, 36% inter-married.

Behaviors: Youth/Teens

Based on best available data:

- **Formal Education (Hebrew, Day School):** About 2,200 (34%) – out of 6,400
- **Youth Group:** About 800 (40%) members – out of 2,000
- **Teen Israel Travel:** About 175 (35%) per year – out of 500 per year
- **Overnight/Day Camp:** About 2,500 (38%) - out of 6,500
- **Early Education:** About 675 (27%) - out of 2,500

Josh’s Observations and Opinions: Broad generalizations about Pittsburgh’s Jewish community

- **Jews in Pittsburgh tend to behave like Jews in other places.** In general, we travel to Israel, attend Hebrew school, light candles, attend Seder, etc. like Jews at similar rates as Jews around the country. *Much of the discussion at the national stage about Jewish trends, behaviors, etc., is applicable to us.*
- **Like Pittsburgh, we are often the turtle, not the hare.** The latest thoughts and ideas sometimes take a while to take hold here. This can make us slow to change, but also helps us avoid bubbles, fads and false starts.
- **We are centralized and urban.** Half the population and most of our major institutions are in greater Squirrel Hill. This is largely because of Pittsburgh’s lack of sprawl, but also in part by design. This gives us “strength” beyond our numbers. This is a strength (numbers, identity, inter-community relations, diversity) and a weakness (more expensive to operate, may be under-serving those outside our urban core.)
- **Our mid/large size community is an asset.** We are big enough to have strong institutions and the resources to innovate, operate, try new things; we are small enough that people know each other, we can do things together. *This is part of our recipe for institutional collaboration.*
- **We have generally good inter-community relations, between people and organizations.** Because we all live together in greater Squirrel Hill, we have more opportunity for interaction among groups within Jewish community. Where in many communities their institutions see themselves in competition, by comparison we have a reputation for friendly relations and modeling partnership and cooperation. *I believe this to be true for institutions. Is it true for people? Do we get along or merely tolerate each other better?*

National Data, Focus on Reform Movement

Source: 2004 presentation based on 2001 National Jewish Population Study

North American Affiliation Rates

- 35% Reform, 26% Conservative, 10% Orthodox, 9% other, 20% “just Jewish”
- 44% of Jewish households belong to synagogue
- 40% of affiliated households are Reform

Denominational Switching

- 43% of Reform Jews were not raised Reform;
 - 25% raised conservative; 9% Orthodox; 7% Just Jewish; 2% Other
- 24% of Jews raised as reform and that are still Jewish are not reform.
 - 10% are “just Jewish”; 6% Conservative; 8% other
- 59% of affiliated reform Jews that were raised Jewish were not raised Reform
 - 34% Conservative; 11% Orthodox; 10% Just Jewish; 4% Other
- Between 1990-2000, Net affiliation among Jews stable; Conservative share shrunk (51% ->33%), Orthodox (10% ->21%) and Reform (35%->38%) grew.

Jewish behaviors (adults)

| | <u>Services</u> <u>1/yr</u> | <u>Seder</u> | <u>Fasted on</u> <u>Yom Kippur</u> | <u>Half or more</u> <u>Closest</u> <u>Friends Jewish</u> |
|-------------------|--------------------------------|--------------|---------------------------------------|--|
| Reform | 75% | 82% | 57% | 56% |
| Affiliated Reform | 96% | 94% | 70% | 69% |
| All Affiliated | 97% | 96% | 80% | 76% |
| All Jews | 61% | 67% | 59% | 52% |

Israel

| | <u>Been to</u> <u>Israel</u> | <u>Very</u> <u>Emotionally</u> <u>Attached</u> |
|---------------------|---------------------------------|--|
| Reform | 34% | 21% |
| Affiliated Reform | 44% | 27% |
| Affiliated Conserv. | 57% | 41% |
| Affiliated Orthodox | 75% | 66% |
| All Affiliated | 55% | 41% |
| All Jews | 35% | 28% |

Inter-marriage

- Intermarriage rates among Jews **stabilized** in the 90s. (pre-70s: 13%; 70s: 28%; 80s: 41%; 90s: 46%.) *Initial reports of 50% from 1990 that scared everyone were wrong!*
- Intermarriage rates among **Reform** Jews and affiliated Reform Jews **mirror Jewish population**; stabilized over past decade.
- 2/3 of Intermarried Reform Jews were raised Reform; **More in-married, affiliated Reform Jews were raised conservative (43%) than were raised reform (31%).**

- **Raising kids Jewish:** 33% of all inter-marriages; 65% of Reform intermarriages; nearly every child of affiliated household of either type.
- **29% of children in affiliated Reform homes have intermarried parents**

Topics, Trends and Themes being discussed in North American Jewry

This section is more “topics being discussed” than fact...

- **Post-continuity.** Where the 90s were defined by “outreach” and “continuity” in response to shocking intermarriage rates, thought has now shifted toward the more affirmative idea of “renewal.” *Has Pittsburgh made this change in thought? action? Are we driven by fear, or hope?*
- **Rising Israel.** Studies show that engaged Jews still feel a strong connection to Israel. Changes are (a) many people are not identifying Jewishly and (b) the *nature* of connection to Israel becoming more complex. *There are now more Jews in Israel than North America. The center of Jewish life has shifted; this has cultural, political, financial, implications for Israel and North American Jewish communities.*
- **Sovereign Self.** Younger generations “build” their identity from component parts. They do not define themselves based on *membership* to groups. *For non-traditional Jews, shift from collective to looking for “value proposition”.*
- **Technology.** Two major changes: (1) Democratization of Jewish knowledge. You can now learn, grow and engage without going to a Rabbi. (2) Community is no longer defined by physical proximity. *We are still figuring this all out. Upside and downside. What is real, what is hype?*
- **Post-institutional.** With the decline of membership as a driver of identity, younger Jews are more likely to float between communities, institutions, groups, ideas, etc. to build their own customized Jewish experience. *Decline in membership doesn’t mean they don’t care about being Jewish, it means they want to “experience Jewish” in different ways.*
- **Informal Education.** While it has always existed, greater attention, thought and appreciation is being given to informal education (camp, youth group, etc.).
- **The Birthright effect.** New philanthropic model is for super-wealthy donors to make change outside of traditional institutional process. Some say this is necessary for innovation, others say few should not make major investments that impact the collective. *Is this good or bad? Opinions are across the map!*
- **Jewish Journeys.** Term being used that captures a number of ideas ... (a) individual over collective way of looking at Judaism, (b) holistic /whole self (c) connections among institutions/ways we engage Jewishly
- **Transfer of wealth to the next generation.** Many of our institutions are sustained by an aging donor base. A great risk to individual organizations and the organized Jewish community as a whole is the transfer of wealth from the greatest generation and boomers to the next generation. The pattern in most cases is that, even where total dollars raised is increasing, the donor pool is shrinking.
- **Cost of Jewish living.** This long-standing problem is rising to the surface in many communities. Many cities are seeing the barbell effect: the wealthy and (subsidized) low-income are engaging; the middle class is being squeezed out. *Is this happening in Pittsburgh?*
- **Service learning.** Growing niche. More than “social action” or “volunteering”, service learning is an educational model of immersive experiences that combines service, reflection and action toward long-term, systemic change. *The model works well for Jews who appreciate good text study and immersive experiences.*

Appendix C. Rabbi James A. Gibson's Sermon: "Promises, Promises"

Kol Nidre — 5773

"Promises, Promises"

Rabbi James A. Gibson

September 25, 2012

I remember going to my first college Kol Nidre service at the University of Michigan back in '71. Although I had spent 95% of my life in the Reform movement, I was convinced by some friends to go the Michigan Union for the Conservative service. As I opened the book, I was surprised to find that there were actually words to Kol Nidre, the most famous of all high holiday prayers.

You see, growing up, my entire knowledge of the high holidays came out of one thin book. It was called, The Union Prayer Book II. It had a black cover, as distinguished from the blue covered Union Prayer Book I for Shabbat and Festivals. Here it is! (Show UPB II)

Growing up with this prayerbook, it was clear that God preferred English to Hebrew, which is why we used so much of it. Surely God preferred "All the world will come to serve Thee and bless Thy glorious name," to "Adon Olam."

I knew God preferred English because in the UPB II Yom Kippur evening service there was no printed Kol Nidre at all! At the bottom of page 130 in the Union Prayer Book was a simple notice: "The Kol Nidre Chant." No Aramaic, no Hebrew. Just a very free interpretation in English. That was it.

Why was the text of Kol Nidre missing?? It certainly wasn't to save space – it's only one paragraph. No, Kol Nidre was missing from the prayerbook of my youth for one simple reason: It was embarrassing.

Kol Nidre is an Aramaic formula which allows for our legal vows to be set aside in certain situations. It comes from the 8th century. As it gained popularity, though, the rabbis harshly criticized it. One went so far as to call it a "minhag sh'tut," or a "foolish custom."

You see, vows, or legal binding promises, are actually quite important in Judaism. You make one by swearing to fulfill an action using God's name to back your promise. Tradition warns us against making these kinds of vows. Why? Because they are like student loans these days. They follow you until you fulfill them or you die. No one can discharge your vows for you.

Throughout the Middle Ages, anti-Semitic officials in Europe used Kol Nidre as proof that the promises of Jews could not be trusted, as they could always disavow them. That is why the rabbis tried to stamp it out. But Kol Nidre would not die. It is one of the rare cases of the people defeating their Rabbis in a matter of religious practice. How did this happen?

It was a strange combination of factors: 700 years later, during the Inquisition, Kol Nidre comforted Jews forced to convert to Catholicism against their will. In modern times, our mothers and fathers found comfort in the prayer as they faced their shortcomings. They didn't look at it legalistically. Kol Nidre made a hard life just a little easier on the soul.

But what really saved Kol Nidre was the melody. More than the words, people were touched so deeply by the melody the words almost didn't matter.

The ancient passage is fixed in Aramaic. The only change ever accepted was instituted more than 700 years ago by Rabbi Menachem Meiri, (1249-1310) universally known as the "Meiri." He changed the formula from annulling vows we made *last* year to this *coming* year, annulling future vows we *might* make. This brilliant move stopped the business of canceling real past promises and applied the formula to non-existent promises – ones the we *might* make, which since they have not been made, have no legal standing anyway!

This notwithstanding, the authors of my Union Prayer Book II weren't taking any chances. No Reform Jew in America for *generations* was permitted to read the words of Kol Nidre. No, either there was a blank space or the stark words, "The Kol Nidre Chant."

It seems bizarre that our movement, dedicated to knowledge and enlightenment, would foster ignorance by excluding the words of Kol Nidre. We were so concerned about the fallout from the non-Jewish world over this prayer that we solemnly asked congregations year after year to rise and pay Ω

Finally, in 1978, with the introduction of this prayerbook, The Gates of Repentance, we got the words included.

And guess what? The sky did not fall. The world did not collapse. No mass breakout of hatred for Jews. No recorded case of a Reform Jew looking up in the middle of Kol Nidre services and saying, "Oh boy! I get to make promises that I won't keep next year!" There is no court that has ruled that contracts made by Jews are not enforceable because of the Kol Nidre.

Those leaders lived in very different times, while we Jews today are blessed with acceptance in America that is rarely called into question. We have the blessing tonight of hearing Kol Nidre with full hearts, not just the words and melody, but all of the echoes and overtones of our childhood memories.

For its power is unmistakable and undeniable. I have been transfixed by the Kol Nidre chant in Tenafly, New Jersey, Minneapolis, Minnesota, Ann Arbor, Michigan, Cincinnati, Ohio, Jerusalem, Wausau, Wisconsin and here with you in Pittsburgh, not once, or twice, but now, 25 times.

This is the 25th time that I have stood before you on Kol Nidre, holding a Torah scroll, entranced by the haunting words and melody. This is the 25th time I have had the unique honor of sharing this pulpit with these extraordinary leaders and founders of this wonderful congregation. This is the 25th time you have invited me to share my thoughts with you on this, the holiest night of our year.

I remember that 1st Kol Nidre. It was glowing and awesome. The next morning, I looked out at your bright shining eyes and gave a sermon on betrayal, starting with the case of Jonathan Pollard, the American naval analyst convicted of spying for Israel.

I then spoke about the family betrayals all of us have suffered. Finally, I spoke about this congregation's sense of hurt and betrayal before I arrived in 1988. During that part of the sermon, you in the hope that we could grow into happy, fulfilling relationship together.

I recently found the words that I offered that day. There is only one hard copy of it that I know of and I looked at it, on yellowing paper in all its dot-matrix printer glory. And tonight, on Kol Nidre, the night when we consider our vows most seriously, it is appropriate to hold me to account to you, even as all of us are held to account to God.

I said to you that day (I'm quoting here):

"I promise that I will listen and that I will try to make our dreams as a Temple family come true.

I promise to teach as well as preach, roll up my sleeves when it is called for, not shy away from difficulty or criticism.

Most of all, I promise to care, to care when you and your family celebrate or when they mourn, to care when you and your family are ill, to care about the quality and content of your children's Jewish education...

I remember delivering these words into a momentous silence, filled with trepidation, even fear. We were looking into an uncertain future together, dimly, with only hope as our only compass.

Now, 25 high holidays later, it is legit to ask, have those promises been fulfilled?

I believe that many of them have. I have tried my best to listen to you, your hopes, your dreams and your fears.

I have taught, not just preached, and not shied away from rolling up my sleeves to do the work around here, whether it was hauling garbage, moving chairs, puzzling out budgets or envisioning our future with our leaders late into the night.

I have tried to be there with you in sickness and in health, in joy and sadness, challenge and crisis. I believe I have, to the best of my ability, cared about every one of you in the family throughout these many years.

I have tried to keep my promise to your children. We have grown in our efforts from 12 b'nei mitzvah my first year to averaging between 30-45 over the last 20 years, more than 700 in all. And I have been blessed to confirm 385 of our young adults along the way as well.

I am mindful of failure as well. And now I stand before you, as humbled as I have ever been, filled with recognition of mistakes and hurt and pain that I have caused some of you. As I have in the past on this sacred night, I beg your forgiveness for the times I have let you down, have not lived up to your expectations, acted contrary to your hopes.

You made certain promises to me that first year. The most important one was *not* that you would pay me a certain salary or give me office space.

No, you promised me that you would try to trust me. Given the previous 12 years of experience with rabbis, that was no small promise. And I tell you from the bottom of my heart, that you have fulfilled your promise, paid it in full; no outstanding debt on that score for you this Kol Nidre night.

And now at our 25th Kol Nidre together, when I see what we have accomplished in our sacred work, when I look out at your bright, shining eyes, I am blown away. My eyes cannot help but brim with tears.

We have kept faith with each other. We have established firm trust in each other. Together we have accomplished so much!

We have created a culture welcoming to youth and families without driving away older members. We are not like those congregations divided into factions – the Old Guard and the Young Turks, going at it, hammer and tong. We never forget we are a k'hilla k'dosha, a holy community.

We have fostered a deep commitment to the life of the spirit. When I came here, there was one service for all. If you didn't like it, it was clear that Temple Sinai was not your place. Now, some Shabbatot offer as many as four different services to help you spiritually connect.

We have created an atmosphere where engagement with our youth is holy work. From Kindergarten to B'nei Mitzvah to Confirmation and beyond! Just consider the amazing kids that you saw

reading Torah on Rosh Hashana and will see tomorrow, kids fired up and honored to be asked to read Torah. Isn't it great!?

Just two weeks ago, at the opening session of the Sandy and Edgar Snyder Teen Engagement program, we barely had enough room in the auditorium for all of the kids and their parents.

We have a lay leadership that is not only concerned with paying our bills, rather fulfilling our mission, vision and values. They insist that Rabbi Symons, Sara Stock Mayo and I dream of the best way to connect you to your faith and then see if we can pay for it, instead of the other way around!

We have expanded the notion of our sacred community beyond the walls of this building. With the children's service at the JCC and the young adults RH at the Carnegie, as well as the interfaith couples group in peoples' homes and the men's discussion group at the Oakland Panera, the monthly downtown lunch group and Fineview softball field, we have clearly said that Temple Sinai is not just a building. We are a family and we meet wherever and whenever you want to be together.

We have committed ourselves to primary Jewish acts of Spirituality, Study, Social Justice and Sacred personal connections. Our centers, along with our auxiliaries for women, men and youth, give us seven wide open channels for involvement, seven large doors to enter into liberal Jewish activity, each door an opening to other doors.

We have fostered a spirit of experimentation. We honor our traditions, but we don't worship them. The best example of this was when, several years ago, we tried an experiment called "Mostly Musical Shabbat." We tried it one time in the middle of a blizzard. We anticipated 30-40 people. More than 300 of you came. We made an on-the-spot decision to offer this service every month ever since! At the last two of these services, at the end of August and beginning of September, more than 550 of you were here!

I believe we have kept our past promises. We work hard to make our present offerings vibrant. But what about our future? What vows might we make tonight that might just get me into hot water this Kol Nidre? Here are seven I hope to fulfill with you in our coming years together:

1) I vow to find ways for us to become more literate Jews. I grew up in a Reform Judaism that assumed that we were not interested in learning Jewish texts. Rather we were to sit and be spoon-fed our faith. But more and more of you demand authenticity, not a Judaism-lite! This will require looking at source texts, not just book reviews. Authenticity will require more engagement with our Bible, our rabbinic texts, our history and our ethics. If we do not embrace this heritage and make it our own, we risk drifting away from it.

2) I vow to work with you to build a secure financial future for Temple Sinai for the sake of the next generation. As part of this effort, I vow to work to find a way to make this place affordable for you. At the same time I would like to help create a culture where you consider Temple Sinai as one of your highest priorities for giving beyond your annual commitment here.

We will continue to oppose the attitude of some who simply want to buy services from us – bar and bat mitzvahs, weddings and funerals. It is not who we are and I vow that as long as I am here, it is not who we will be.

3) I vow to take a hard look at what are our obligations to the Jewish community at large and the Reform community in particular. We have reached a size and stature that demands that we look at ideas, needs and opportunities in a larger context.

We will find ways to collaborate on some issues as we try to avoid costly duplication of services. I vow to work toward this goal without sacrificing our identity or our mission, vision and values.

4) I vow to try to create a "Temple Sinai Shabbat table." In the Chabad community, if you show up at the service Friday night, you *will* be invited to dinner. It is not even a question. Couldn't we do the same?

Especially when we welcome Shabbat at 7 PM, we could have a group of congregants, maybe 3 homes at a time who would welcome others home for Shabbat dinner from services. We would help all host families learn or review the elements of a traditional Shabbat dinner. We could provide funds to offset the cost of bringing guests to home for those who needed it. We could do it twice a month and call it "The Shabbat Supper Club!" Shabbat dinner, warm, interactive and conversational, is worth more than most of my sermons on Shabbat.

5) I vow to ask the question, just how much do we see our Reform identity bound up in *refusing* to observe hardly any standard of kashrut? We have very little formal policy here. Simply put, no bacon, ham or pork, but all the shrimp and cheeseburgers you want!

Don't we have a responsibility to the larger Jewish community whom we often invite to our programs and events to make sure we, as good hosts, provide fare that is available for all to eat? To be honest, this is one of the reason I keep a kosher home, so all Jews will be able to eat there, and Jews from the Orthodox community have eaten in my home off my dishes. Is this important to us? If not, why not?

Please let me be clear. Crystal. I am not pushing for us to have a kosher kitchen here at Temple Sinai. OK? No angry e-mails. We're not starting a kosher kitchen...

I am asking how important eating shrimp and cheeseburgers is to us if the cost is keeping other Jews out of this synagogue. Even if we do nothing, the conversation is certainly worth having.

6) I vow not to take our present success for granted. All success in membership and engagement is temporary at best. Whether because of demographic trends, financial challenges or changes in leadership, it is no sure thing that we will enjoy the success we have built over 25 years.

Is it our responsibility to look 15 years down the road, beyond when I will no longer be your senior rabbi? Or should we focus on the issues and challenges right here and now? Can we afford to deal with one at the expense of the other?

We must ask: How do we best serve our movement of Reform Judaism? Is it by building the best synagogue we can by dint of our labor and our gifts? Or should we work to strengthen the cause of liberal Judaism as a whole? I vow to struggle to answer these questions with you, not for you.

7) I vow to help build a community of younger adults who feel they are charting their own Jewish destiny, not only helping to fulfill ours. This will require new ways of connecting with them, some of them challenging to a standing institution. We must invest in younger Jews who may never belong to our synagogue simply because it is necessary for the future of the Jewish people. Rabbi Symons's Rosh Hashana experience was a good start, but there is so much more to do.

Oh, and one more vow just for good measure. I vow to laugh and sing more and fuss and fret less. You may have to hold me to that one.

I remember one vow I could not make to you, all those years ago. Twenty-five Yom Kippurs ago I said to you:

I cannot promise that I will be here for the rest of my career. Those who remember the story "Mary Poppins" will recognize that as what she called, "a pie-crust promise, easily made, easily broken." But...I plan to be your rabbi, the rabbi of Temple Sinai for many years to come...even as we go on to push our congregation to realize its...dreams."

I'm still not sure I can *promise* to be here for the rest of my career, although it is looking more and more like a sure thing! One thing I know - we are not finished with our work together at Temple Sinai, you and me.

When I think of our journey, I don't only think of all we've accomplished, but of all the incomparable, inspiring individuals who have passed on along our way. I read their names with reverence on the weekly Kaddish list. And I am filled with gratitude for the gifts they gave to all of us and to me and my family as well.

25 years! Look at us! Look at all of us! The number 25 in Hebrew corresponds to many Hebrew words, but one that touches my heart tonight is *b'tu-vo* from our morning prayer for the sun, the moon and the stars. *B'tu-vo* means "through God's goodness." I believe that through God's goodness we have been blessed to share these 25 seasons together. I believe that through God's goodness we have embraced each other all these years.

One of my favorite pianists growing up was Artur Rubinstein. I got to meet him twice! And my favorite story about him is that in 1952, at age 65, he signed a 25 year recording contract. People laughed. They scoffed. How in the world would he ever fulfill that contract! He'd be 90! And hardly anyone reached the age of 90 in those years.

Well, *he* did. And in 1977, at age 90, he celebrated fulfilling that contract...and promptly signed another one for 25 years! Although he died five years into the contract, I wouldn't be surprised if he is not still recording Chopin in heaven.

25 years! Through God's goodness. Oh, the promises we have kept! The promises we will yet keep. For we are not done, you and I. Not by a long shot. I promise. I do *so* promise.