
TEMPLE BETH ISRAEL
STRATEGIC PLAN
2019 - 2024

April 2019

PLANNING FOR OUR FUTURE



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INTRODUCTION

INTRODUCTION

Since its founding in 1930, Temple Beth Israel (TBI) has developed as an institution with a rich history. Its development reflects a community of proud Australian Jews, who have sought to create a practice which reflected their history and experience. TBI is both a not-for-profit organisation and a sacred community whose members practise a living Judaism. The management of the organisation is a sacred partnership between the lay leadership, represented by the President and the Board, and the Rabbis headed by the Senior Rabbi. Not only does the Board have statutory, legal, and financial obligations, but the Board and Rabbis engage in a sacred covenant, a brit of collaboration for common purposes.

TBI is proud to be one of Melbourne's oldest and most significant Beit T'fillah (Houses of Prayer) with a proud liturgical history which has evolved over the last 87 years, with much that has changed and much that has remained the same in terms of its religious life.

As we move forward towards our 100th anniversary, it is time to consider what will push us forward and, what will keep our momentum going. We need to consider what will continue to be meaningful to our members and, should we attract new members, what will draw them to our congregation, while staying true to our values and mission.

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All organisations need to stop and reassess their direction and focus from time to time. This strategic plan is a forward-looking document which sets out the Board's direction for the next five years. It is an overview of the challenges and issues discussed by the Board and Rabbinical staff at a number of Planning for the Future workshops and has considered the Gen17 research recently undertaken at Monash University on the values and aspirations of the Jewish community. In this document we provide a summary of the values and core business of TBI and introduce priorities and strategies that will take our sacred community forward.

EXECUTIVE SUMMARY

This document identifies the values, mission, and core business of TBI. It sets out challenges and opportunities and articulates some overriding goals and priority areas which need to be addressed to ensure the ongoing sustainability and vitality of TBI for the next five years.

Much good work and a huge increase in programs and offerings have occurred at TBI in the last five years. This strategy provides a direction for refining those initiatives to ensure they align to the three pillars of *Beit T'fillah* (House of Prayer), *Beit Midrash* (House of Study) and *Beit K'neset* (House of Gathering), and our values and essential questions. It provides a direction and focus based on evidence, Gen 17 research, overseas expertise and publications as well as the considered deliberations of the Board and the rabbinic team.

... areas which need to be addressed to ensure the ongoing sustainability and vitality of TBI for the next five years

Five goals will underpin ten identified priority areas which are set out at the end of this document. The goals are: affirm and articulate religious practice; build and maintain a sustainable budget; align programs and initiatives with core values and core business; invest in youth and young families; develop and grow key strategic partnerships.

The next steps will be the development of an Action Plan that will consist of actions, timelines and responsible staff and lay leaders. There will be communication and conversations with our membership on a regular basis. The result will be clear direction and positive outcomes that will take our sacred community forward.

ACKNOWLEDGEMENTS **BY THE PRESIDENT**

The Strategy outlined in this document would not have been possible without the work of key groups and individuals, most of whom are dedicated volunteers. The Board therefore acknowledges and sincerely thanks:

The TBI Vision Committee led by Robert Hershan for highlighting many of the challenges and opportunities outlined under religious practice, positioning and membership.

The Planning for our Future group chaired by 2018 Vice Presidents Judi Cohen and Gary Lewis comprising Dorothy Graff, Alain Grossbard, Robert Hershan, Jeffrey Leigh, Robert Sward, Alla Medownick, Sue Silberberg and Rabbi Gersh Lazarow. This group compiled background materials, prepared and presented the Board workshops.

Rabbi's Gersh Lazarow, Kim Ettlinger and Cantor Michel Laloum who have generously shared their time and thinking about TBI's future.

Former Board member Sue Silberberg who patiently consulted, received feedback, discussed and wrote the document.

Heartfelt thanks to all these people and to the 2019 Board for embarking on a strategic approach to TBI's future.

*Rebecca Silk
President*

***STATEMENT OF IDENTITY
OUR MISSION
CORE BUSINESS: THREE PILLARS***

STATEMENT OF IDENTITY

We are a kehilla kedosha (a spiritual community) that practises a living Judaism inspired by Torah (Five Books of Moses) and guided by Halacha (Religious Law). As inheritors of a divine mission and a prophetic tradition, we dedicate ourselves to learning the lessons of our past in order to shape our present and define our future. Appreciating that each of us is created in the image of God, we celebrate diversity in all of its forms and embrace an individual's ability to make informed choices about their own practices and beliefs within the framework of Progressive Judaism.

OUR MISSION

Temple Beth Israel is a kehilla kedosha (a spiritual community) bringing innovation and creativity within Jewish traditions. We provide multiple pathways for our members and friends to engage with Progressive Judaism that enhances their lives through spiritual enrichment, learning and community. We are guided by principles of egalitarianism and respect for others. We are inspired to continually develop and grow and to provide a spiritual home for all who wish to embrace our values. Temple Beth Israel acknowledges that we are assembled on the land whose traditional custodians are the people of the Kulin Nation.

CORE BUSINESS THREE PILLARS

Our Mission speaks of our commitment to “provide multiple pathways for our members and friends to engage with Progressive Judaism that enhance their lives through spiritual enrichment, learning and community.”

At the heart of this statement is the understanding that while many of our members and friends have always sought a similar sense of belonging from community, they are increasingly finding that belonging in different ways and through diverse experiences.

Indeed, while some seek spiritual enrichment through pastoral relationships and liturgical experiences in our *Beit T'fillah*, others are looking to learn more about our Jewish history and heritage through our *Beit Midrash*, whilst others still are seeking fellowship and community in our *Beit K'nesset*.

Over the past two years our rabbinic and professional team have engaged in a 360-degree review of all of our religious life, educational programs and communal offerings, as we seek to do everything in our ability to ensure that our *Beit Yisrael* (House of Israel) continues to be one of the foremost Jewish communities in Melbourne with our three pillars:

• *Beit T'fillah* House of Prayer • *Beit Midrash* House of Study • *Beit K'nesset* House of Gathering

We seek to do this by not only ensuring that our rabbis continue to nurture our kehilla kedosha by providing spiritual leadership and care for our community, but also by ensuring that we are appropriately resourced to meet future needs and opportunities.

OUR CORE VALUES

- MEANINGFUL RELIGIOUS PRACTICE
- EGALITARIANISM
- INCLUSIVITY-DIVERSITY
- RESPECT
- *TIKKUN OLAM*
- COMMITMENT TO ISRAEL

ESSENTIAL QUESTIONS

In framing our way forward and responding to this strategy, we need to base our decision making on a set of strategic questions.

1. Is this Torah centric?
2. Is this an expression of our evolving tradition?
3. Does this find the balance between diversity and continuity?
4. How does it belong in our Beit Yisrael?
5. What are its resource implications?

ABOUT US

ABOUT US

Temple Beth Israel (TBI) was founded in 1930 with the aim to 'develop a free, progressive, enlightened, united and respected Melbourne Judaism.'

This was a successful undertaking, and by 1955 the community had reached 1500 members, a membership which has stayed relatively constant until recent years and now comprises 900-member units. In 2018 TBI is led by a Board and a professional team headed by a Senior Rabbi supported by a Rabbi and Cantor, educational, facility and administrative staff.

Since our inception, TBI has prided itself on being at the forefront of Progressive Jewish practice, developing inclusive ways of engaging the community.

For TBI egalitarianism is a core tenet and value. From its founding, this has been expressed in the involvement of women at all levels of the organisation, including its rabbinic and lay leadership. This egalitarian and non-gendered approach saw the introduction of Bat Mitzvah for girls in 1973.

This strategy intends to position TBI into the future, as a leader of both Progressive Judaism and within the Jewish community more widely. TBI will be known for the strength of its religious practices. We will be a vibrant centre for multi-generational Jewish life, offering religious programs, life cycle events and educational opportunities for all ages. Within this framework we encourage significant opportunities for volunteer participation and communal engagement.

We will operate the organisation under a financial framework which results in a balanced budget. To address cost savings: efficiencies are required, a review of the staff model conducted and additional streams of income need to be integrated.

As good community citizens, this will be achieved with consideration of our environmental impact.

RECENT CHANGES

Over the last five years, TBI has experienced:

- Growth and innovation in our religious services and lifecycle events
- Extensive internal renovation and renewal of buildings
- Technological upgrades
- Greatly improved digital infrastructure
- Exponential increase in programming
- Expansion of educational offerings
- An intentional and welcoming approach
- Partnering with institutions of excellence.

There have been many positives from this increase in activity and also many challenges.

IMPLEMENTATION STAGES

Preparation	October to December 2018
Consultation	December 2018–January 2019
Finalisation	March 2019
Implementation	from April 2019
Review	December 2019

The Action Plan will outline the response to this strategy document, showing prioritisations, accountabilities, implementation and/or completion dates, and any contingency plans. The implementation of this plan will include communication and consultation with the TBI community on a regular basis.

A process of review is also required to monitor implementation of these strategic imperatives.

***CHALLENGES AND
OPPORTUNITIES***

CHALLENGES AND OPPORTUNITIES

These challenges were developed from a series of discussions with the "Planning for our Future" working group and then the full Board and rabbinic staff of TBI. These challenges describe the issues as seen in these meetings and are the basis of the priorities and strategies outlined at the end of the document. To enable a clear narrative of the issues facing TBI, the challenges outlined required a different order to the strategy points at the end of the document.

FINANCIAL STRUCTURE Our operational structure has caused financial challenges in the day to day running of the synagogue. For the last several years, TBI has been operating with cumulative annual losses. Membership and affiliation fees cover 58% of the operating budget, and the balance of the income derives from program fees, general donations and lifecycle events. The synagogue receives generous donations annually from our members, with most of these funds going via the tax deductible entities. Some grants have also recently been received from government.

With the introduction of the TBI Foundation in 2018-2019, we expect that major donors could direct funds to this entity, creating a shortfall in fundraising. The annual budget does not include funding for unscheduled and unpredicted capital works, including the matching funding required for some grants such as the Gateway project.

Tied to these budget considerations, current perceptions see a resistance to the present membership fee model. Therefore, alternative forms of funding are required to ensure the sustainability of TBI. The Foundation aims to assist with this process, but it may take many years to reach a critical level where earned income will be sufficient to support the operations of TBI.

TBI COMMUNITY ENGAGEMENT

TBI's mission is to provide a spiritual community for its members. The sense of community has always been vital to TBI. Recently a number of initiatives have been implemented to further develop this belonging. Examples of this are outlined under recent changes and include: welcoming events for new members, monthly Shabbat dinners and pre-service drinks, and recognition of senior members birthdays through calls from Board members. To maintain this sense of community, initiatives should be developed to engage with a wider spectrum of the membership, specifically to assist members connect to their Judaism.

To ensure TBI's long term viability and to ensure younger members' connection to Judaism, it is imperative to develop new and innovative ways of engaging with youth and young adults. Netzer targets school aged students and TBI supports their activities. But for post school aged youth, adults and families, TBI offers little to consistently engage these demographics.

CHALLENGES AND OPPORTUNITIES

RELIGIOUS PRACTICE

Each generation of religious leaders in the Progressive movement has articulated its religious philosophy. The evolution of Progressive beliefs and practices can be found in the historic documents listed below. The most recent articulation is the publication “Living Judaism: The Key Principles of Progressive Jewish Life”. Circulated with the background papers to this strategy (the Planning for the Future Briefing Book) were several publications which reflect our position and its evolution.

- Rabbi Dr H.M Sanger, *The Truth about Liberal Judaism*, ‘published as a manuscript by Temple Beth Israel’, 7 August 1953.
- Rabbi John S Levi, *21 Questions on Progressive Judaism*, World Union for Progressive Judaism, Melbourne, 1993.
- Rabbi John S Levi, *Our Place in the World—Thirty Questions about Progressive Judaism*, Union for Progressive Judaism, 2002.
- Union for Progressive Judaism, *Living Judaism, The Key Principles of Progressive Judaism*, Concord, NSW, 2015.

As we have evolved, the Senior Rabbis have responded to their contemporary society and wider Progressive Judaism, adjusting our liturgy, music and religious practice in an effort to ensure our religious life remains relevant, accessible and meaningful to our community. This has been supported by a series of Religious Life Committees who have been formed to provide the congregation with a platform for feedback and ideas. Our aspiration is that our religious life not only reflects the tone of the congregation and the wider Progressive movement, but also inspires greater spiritual involvement and a more meaningful Jewish life.

Intermarriage has become a major factor in contemporary Jewish society. This creates challenges for the long-term viability of Australian and world Judaism. While TBI has ensured that its practices welcome intermarried families to the congregation, this has raised unintentional consequences. These have included the potential to change the composition of the community, and the normalisation of intermarriage in the community psyche. For TBI there is the challenge of how to include family members, including non-Jewish partners, in religious life. Some TBI members are not comfortable with recent changes and consider they contribute to a perception of our Judaism as less authentic than other streams. However other members welcome their inclusion and consider that it reflects our values of inclusivity and diversity. We need to continue to find ways to make all members of these families welcome, and to assist them to lead a Jewish life.

Currently some rabbinical and support staff time is taken up with also assisting the needs of non-members. This has a financial cost to TBI and adds to staff workload. The question arises as to how much time and effort the rabbinic team should be spending on these activities, and how much is it a responsibility of TBI and a potential way of engaging new members? These issues require elaboration in this strategy and a direction identified for the clergy.

CHALLENGES AND OPPORTUNITIES

EDUCATION LIFE

Within Judaism, education is considered to be lifelong learning, which begins at birth. Our Beit Midrash (House of Study) has consistently provided education programs to support our vision, formalising education for all children, commencing with learning the Hebrew alphabet and then continuing through Bar or Bat Mitzvah, and into adult learning.

Over the last few years, TBI has sought to ensure its education programs keep pace with changes in learning strategies and opportunities for both adults and children. In 2012, TBI began revamping and re-imagining our youth education programs, resulting in a change to our supplementary school, TBI Tamid, and further changes consistent with youth education theories. These have positively influenced our programs including transformation of our B'nei Mitzvah program which has seen over 100% growth since 2010. Recently the expansion of our Geirut (conversion) program has also enhanced our offerings to those seeking to be a part of the Jewish community.

Four years ago, the Adult Education Committee formed to provide guidance and renewal of our programs in this area. This has resulted in a robust calendar of educational opportunities for our members, which have grown in popularity, strength and meaning. These have recently been enhanced with the addition of a strategic partnership with a partner of excellence, the Florence Melton School of Adult Jewish Learning.

Although these changes are positioning TBI as a centre for educational excellence in the Melbourne Jewish community, a number of challenges require work.

These include:

- how to leverage our partnership with the King David School to expand and enhance our educational and experiential offerings for pre and primary school aged students.
- how to maintain engagement and foster continued learning for our youth post b'nei mitzvah
- how to increase the uptake of our adult education offerings by members and expand our reach and relevance across the wider community.

CHALLENGES AND OPPORTUNITIES

MEMBERSHIP

Membership and belonging at TBI is built on honouring our history and tradition, while recognising the complexity of modern family structures and the desire of various family types to embrace Jewish life and traditions. We therefore welcome individuals and families who have a clear commitment to Judaism and wish to find a place in our community. The category of Affiliate Members has been developed to cater for these individuals.

To maintain the budget and programming, TBI needs to ensure that membership levels are maintained at a minimum of 850 membership units. The age distribution at TBI is in line with that of the wider Jewish community, with a bulge in members aged over 55 (with the second largest bulge being in the 30–45 years group), resulting in a predicted decline in membership due to natural attrition. In order to maintain membership numbers and a viable community, TBI needs to attract and retain members from younger cohorts.

The size of TBI is both a strength and a weakness. The strength allows the delivery of a number of programs and services, and many in the community enjoy the sense of belonging to a large organisation. Others find the large numbers impersonal and alienating. In recent years a variety of alternate prayer experiences have been developed and have proved popular, but their rationale and target audience has not been clearly articulated to members. These services are at times hindered by the available space within the building. Offsite prayer services have also been developed, most notably at Emmy Monash for their residents and the very successful 'Pop Up Shabbat' on the Mornington Peninsula in the summer holidays. These services have attracted many people outside the TBI community and offer the opportunity to expand TBI's message and reach.

There are wide cultural and demographic differences among the membership of TBI. This leads to differing, and sometimes conflicting, expectations about aspects including religious practice, programming and financial commitment. Professor Andrew Markus has noted that research tells us successful organisations take clear, and clearly communicated, positions on their rules and values. Style and delivery may change over time but values in such organisations do not change. Both Gen 08 and Gen 17 research indicates that younger Jews are seeking to belong to a values-based community that reflects an authentic Australian expression of Judaism. It may be adapted from, but is not identical to either American or European reform practices

There is recognition that TBI membership costs are high, even prohibitive, for some potential members. In North America, congregations have discovered that individuals and families are less likely to commit to a membership, and more likely to engage through other financial models. Further investigation is required to understand trends and alternative models in other countries.

CHALLENGES AND OPPORTUNITIES

POSITIONING

The values and practices of Progressive Judaism are not clearly understood by the wider Jewish community. The Gen 17 research identifies that the community is moving more towards a conservative position in their religious values. The experience of our clergy and members is that TBI attracts people who share our progressive values. Professor Andrew Markus has recommended that if we wish to expand our membership, it would be more effective to seek membership from those individuals who are traditionally more religiously aligned to the right of TBI because these people are more engaged with their Judaism. To implement this, does not require TBI to change its values, but to be mindful of our messaging.

Similarly, there is concern that the congregation itself does not have a clear understanding of the values of Progressive Judaism. Recent changes to religious practices and musical offerings instigated by TBI have caused discomfort to some members. These practices could be perceived as moving TBI further from mainstream Australian Judaism and our Anglo-German roots and towards a more American Reform model. The challenges are for TBI to clarify where we stand in religious and liturgical Jewish practice.

The partnerships, programs, the site, and the quality of activities, all have the potential to influence the perception of TBI by the broader community. The Board is of the view that TBI's values have not changed but need to be more clearly articulated.

Consideration should be given to how we honour our past while pursuing our future for members and friends of TBI. This must include communication about our range of offerings, developing key strategic partnerships and possibly a change of name.

STRATEGIC PARTNERS

Since the establishment of TBI, the Progressive movement has expanded to include three other synagogues: Leo Baeck (Kew), Etz Chayim (Bentleigh), Kedem (Armadale), a youth movement (Netzer), a school—The King David School (KDS) and a funeral service (Bet Olam). The independence of each of these organisations has resulted in differing programs and practices. For a variety of reasons, these organisations have developed into separate legal entities independent of TBI. This has reduced the ability for progressive Judaism in Victoria to deliver either a clear message of its values and beliefs, or consistent programs, religious services, education and community outreach to progressive Jews in Victoria. Although roof bodies exist i.e. the Union for Progressive Judaism (UPJ) in Australasia and the Progressive Judaism Victoria (PJV), to date they are not seen as effective in their ability to resolve these issues. Going forward, TBI will contribute as an active partner to the work of the PJV and the UPJ.

CHALLENGES AND OPPORTUNITIES

In recent years TBI has partnered with a variety of Jewish and non-Jewish community organisations to deliver or co-deliver a variety of programs and services (for example, the Father Bob Maguire Foundation and the Salvation Army). A cross communal intra-faith relationship has recently developed with Beit Raphael, and there is the opportunity for this to grow into a full strategic partnership and more actively cement our ties in pastoral care across the wider Jewish community.

Going forward, such partnerships will be aligned with TBI's three pillars, core business and contribute to our financial stability.

PEOPLE

In recent years, with the growth of activities, programs and events, the number of support staff has grown to meet the needs of the organisation. Since 2013, a three-rabbi model has evolved and, more recently, the Senior Rabbi has also undertaken the role of CEO. Through this planning process, TBI will create a clearly defined plan with programs and operational imperatives. Following this, a revised staffing model to support these strategic priorities will be developed. There is a strong view by the Board that rabbinic and executive management roles should be separated.

Human resource management at TBI has been rather piecemeal and reactive. There is a need to develop a wider HR strategy that considers strategic priorities and budgetary needs.

INFRASTRUCTURE

Research has shown that TBI sits in the centre of the residential location of its members. Since the dedication of the first building in Alma Rd in 1937, the congregation and its activities have grown. In 1941 the building was enlarged and so the process has been repeated every generation, growing with the expansion of the community and its requirements. The site also includes the KDS preschool. Any works that the King David School (KDS) may consider in the future should be done with consideration of TBI's planning and future requirements.

At present, planning is well underway for the Gateway project, designed to secure entry and egress to the site in a controlled environment.

New multi-option prayer experiences are being offered to congregants, but the internal configurations of the building impose limits on such options.

Due to financial constraints, alterations, additions and improvements to the site have been undertaken without an overall master plan. This has resulted, in at, times compromised solutions.

In the last year TBI has made considerable investment in digital infrastructure including new servers, high speed broadband, installation of Shulcloud (a database and relationship management system). Full utilisation of these assets requires a focus on communication via digital tools.

At the same time, valuations for the site are high, and opportunities exist to generate a return on this investment through creative utilisation and a potential reconfiguration and rebuilding of the facilities. This is a long-term aspiration, which can only be realised through a financially secure position.

CHALLENGES AND OPPORTUNITIES

GOVERNANCE

TBI is governed by Rules (Constitution) and a Board of Governance. Good governance requires that the role of a Board is governance, while staff manage and implement policy. Additionally, TBI has a deep level of volunteer participation in its congregational life. Some volunteers and Board members become actively involved in particular offerings and programs, working alongside staff members. While sometimes this means that roles are unclear, it also creates synergies and enhances outcomes. Care needs to be taken that accountabilities, reporting and budget impacts are clear in such cases.

TBI requires a risk management process to identify, evaluate and prioritise risks with the objective to coordinate resources to minimise, monitor and manage the functions of TBI, as well as to reduce the chances of any major unfortunate events, as this will also ensure TBI's safety and security.

Board members and others in the community regularly identify potential new program areas. By definition, these impact on staff roles and budget. Evaluation of feasibility and impacts of prospective programs, services or events against agreed criteria is required to ensure that they relate to core business and are affordable.

Currently TBI operates under Rules (Constitution) which were developed in a pre-digital age and may need amending to reflect current and future operations. These Rules also allow for office bearers, including the President, to serve a term of only one-year renewable, making the development of a long-term vision difficult. Longer terms are required to ensure organisational stability. In addition, the current committee structure requires realignment to reflect the new priorities of the organisation as a result of this strategy.

A table of goals and strategic priorities for the next five years is contained on the following page.

GOALS & STRATEGIC PRIORITIES FOR THE NEXT FIVE YEARS

