



SUTTON PLACE SYNAGOGUE STRATEGIC PLAN

JUNE 2014

Introduction

Before you is the first formal and comprehensive strategic plan (“Plan”) in the history of Sutton Place Synagogue (“SPS”). This represents an exciting opportunity to declare and document the synagogue we strive to be, the community we hope to foster, and the reputation as a Jewish institution we want to establish. As the entire Conservative Jewish movement explores and evaluates its place in the larger United States Jewish community, so too does SPS ask where it fits in both that community and, more specifically, within the Jewish fabric of New York City.

As part of that collective Conservative examination, SPS was chosen along with nine other synagogues to participate in United Synagogue of Conservative Judaism’s (“USCJ”) Sulam for Strategic Planners as the first cohort of synagogues to engage in a methodical, formulaic strategic planning process. Sulam means “ladder” which symbolizes the “steps up” this process will have led SPS. This document will describe the process through which the Plan was derived. In addition, the Plan will center around three key anchoring themes from which a series of strategies and related action steps will follow.

It is important to also understand what this Plan is NOT. While elements of the Plan will touch on day-to-day aspects of the synagogue, it is not a document that maps the day-to-day functionality of the synagogue—it is not an operational guide. All of the essential support functions SPS has provided, whether it be a minyan for kaddish, a place to celebrate a life event, or a major holiday, will continue. SPS will also continue to be a house of learning and of spirituality even though the Plan may address how to *expand* and *enrich* that experience. The Plan is not some magic elixir that every action or function of SPS can turn to for guidance. However, everything SPS does do from a spiritual, educational, and ritual perspective should tie back to the themes and strategies outlined in the Plan.

It is also important to understand that not all of the strategies contained and discussed in this Plan are *de novo*. In other words, many of the strategies are currently in place (e.g. some of the Community/Chesed-oriented strategies are currently carried out by the Social Action Committee) but the Plan calls for emphasizing and continuing these strategies.

Executive Summary

Critical to any organization seeking to advance is the articulation of a mission statement. The new stated mission for SPS is as follows:

Sutton Place Synagogue is a vibrant congregation, affiliated with the Conservative movement, where people of all ages and backgrounds engage in learning Torah and acts of Tzedakah and participate in meaningful expressions of prayer, in an effort to strengthen their personal Jewish identity and to connect membership with the greater Jewish community and the global community in which we live.

A more detailed Plan follows herein but at an executive summary level there are three overarching themes that form the foundation of the Plan:

- Building Stronger Community Connections
- Engagement of Congregants and Prospective Congregants in Jewish Living
- Development of a Robust Volunteer Leadership Structure

From these three themes are derived sixteen proposed strategies for the congregation. While that may seem like a daunting number, it must be remembered that this Plan is the combined work of five task forces each of which was charged with developing a plan for their own subject matter area. The list of strategies is as follows:

- Welcome and Embrace All New Members
- Involve the Under-engaged Members In Order to Expand the Core of Committed Members
- Serve as Model Members of Greater New York and Jewish Communities
- Increase Member Engagement to Help in Times of Need
- Encourage our Young to Help Others
- Make sure the Community knows who SPS is and that SPS will meet their needs
- Foster learning communities that focus on congregant's interests in order to make social and spiritual connections between adult congregants
- Engage families with very young children to build the Kaplan Nursery School
- Foster learning and social communities for all grades in the Jackson Religious School to create educational, spiritual, and social bonds between families
- Enhance connection between Kaplan Nursery School families and SPS congregation as a whole
- Broaden the base of people who attend Friday night and Saturday morning services
- Deepen congregants' engagement with services through greater participation levels
- Enrich the High Holiday service experience for more congregants increasing the level of participation in these services
- Create an engaged leadership structure for the 21st Century
- Raise funds that affect and support the strategic vision of SPS guided by its core values as well as working with other committees to create an atmosphere that complements the giving culture and creates for donors a meaningful experience
- Cultivate a generous donor culture amongst our members through personal connections thereby creating a sense of shared ownership and pride in our sacred community

Process

After SPS was selected to participate in the cohort, two Co-Chairs of the SPS Strategic Planning Steering Committee ("Committee") were named. Jeffrey Jacob and Shari Pochapin became Co-Chairs and were tasked along with Rabbi Ain, Executive Director Minna Schneider, and President Rick Kaminer to select members of the Committee drawing from all demographic and interest groups within the congregation. The final membership of the Committee included: Gregory Angrist, Alexis Azria, Roger Cohen, Martha Coopersmith, Steven Horowitz, Natalie Kent, Lauren Orenstein, Jeffrey Uffner, and Mark Weiner.

Once the Committee was formed, there were four key first steps for the members to tackle. The first involved the creation of an SPS "Fact Book". This book was a compilation of statistics about the synagogue and the congregation ranging from ages of congregants to average attendance at services to dues structures of SPS and other area congregations to a breakdown of the revenue sources. This provided a foundation for later analysis by the various task forces, *infra*. The Fact Book is attached hereto as Appendix A. The second key step was to create and conduct a congregational survey which provided a sense of current sentiment amongst the members of the congregation. The summary findings of the survey are provided in the Environmental Assessment section, *infra*, and the entire congregational survey is attached hereto as Appendix B. The third step involved

direct phone calls to a cross-section of the congregation. The fourth and final piece of foundational “block building” was to conduct a SWOT (Strength, Weakness, Opportunities, Threats) analysis on the synagogue. A summary of the SWOT analysis will also be presented in the environmental assessment and a copy of the full SWOT analysis is attached hereto as Appendix C.

Subsequent to the gathering of data that became the foundation of the analysis and ultimately this Plan, the Committee underwent a Mission and Vision building exercise. The essential purpose of this was to address what SPS wanted to be regardless of what and where the synagogue is currently. In other words, unlike the more factual data gathering, the mission/vision exercise was more aspirational. The final Mission and Vision Statement is presented herein, *infra*.

Derived from the Mission/Vision exercise were five key areas that the Committee aspired to develop or improve upon within the synagogue. These areas were: governance, finances and development, community and chesed (acts of loving kindness), Torah & learning and tefillah (prayer/worship). Each of these areas became a task force charged with developing strategies and actions to fulfill those strategies. Each task force was chaired by a member of the Committee and co-chaired by a member of the congregation. Gregory Angrist and Jessica Lappin co-chaired Governance. Alexis Azria and Irving Sitnick co-chaired Finance and Development. Martha Coopersmith and Daniel Gross co-chaired Community/Chesed. Lauren Orenstein and Erica Levine co-chaired Torah & Learning. Finally, Roger Cohen and Yael Lieberman co-chaired Tefillah. The full membership of each of the task forces is attached hereto as Appendix D. All of the task forces pursued independent courses of study to develop the strategies which effectively became “mini” strategic plans for each area of focus. This Plan is the amalgamation of those mini plans. USCJ recommended and the task forces largely followed a “PACT” format for articulating their plans. PACT stands for Purpose (Strategy¹)—Why are we doing this? Action—What are we doing? Capacity & Complexity—What will it take to do this? Time—how long will it take to implement the strategy?

The final step before the actual crafting of this Plan document was for each task force to present its report to the full Committee and to select the top action items. As each task force presented, there emerged common themes despite the disparate nature of the topics. These themes became the above referenced anchoring themes that form the crux of this Plan and which are discussed in further detail herein.

The many steps of this process have produced a Plan that we are confident can take SPS to the next level as a synagogue, as a community, and as a key institution within the Jewish fabric of New York City life.

Environmental Assessment

Many strategic plans in for profit industries incorporate an assessment of the landscape in which the company competes and participates. This entails a listing of suppliers, key customers, main competitors and so forth. As this is the first strategic planning process SPS has undertaken, much of the assessment effort and focus was internal. That is to say, the Committee did not look at SPS vis-à-vis other conservative synagogues as competitors (N.B. There was some examination of other synagogues in terms of how they go about certain programs and functionalities that are endemic to all synagogues, e.g. fundraising, but the preponderance of the effort was focused on what SPS does well and perhaps needs to and can do better). Thus, a detailed, comprehensive congregational survey was issued in August 2013. Key findings from the survey included:

¹ Throughout this document, “Strategy” and “Purpose” will be used interchangeably

Satisfaction with SPS

- Very Satisfied 44%
- Somewhat Satisfied 46%
- Neither Satisfied or Dissatisfied 6%
- Somewhat Unsatisfied 3%
- Very Unsatisfied 1%

Top 7 Reasons People Joined SPS (more than one response permitted)

- Branch of Judaism 64%
- Rabbi 63%
- “Warm & Welcoming” 58%
- Cantor 55%
- Sense of Community 48%
- Content & Conduct of Services 46%
- SPS Location 44%

Branch of Judaism Growing Up

- Conservative 61%
- Orthodox 21%
- Reform 15%
- Reconstructionist 1%

Attitude Towards Change

- Maintain tradition while allowing for change 74%
- Maintain tradition 24%
- Change is Important 3%
- Don't Know 1%

Likelihood of Membership in Five Years

- Very Likely 69%
- Somewhat Likely 24%
- Unlikely 3%
- Very Unlikely 1%
- Don't Know 3%

The key takeaways from this survey show a congregation committed to SPS that is generally satisfied with its current offering(s), yet is receptive to change so long as that change is based in maintaining traditional Conservative tenets.

Once the Fact Book was compiled and the congregational survey completed, the Committee conducted a SWOT Analysis. As indicated above, the full SWOT analysis can be found in Appendix C. However, the key findings of the SWOT analysis are summarized here recognizing that a strength can also be a weakness and an opportunity can also be a threat:

Strengths

- Rabbi, Cantor and their working relationship together
- Congregation size—just right; feels “hamish”, “menschkeit” and unpretentious
- Financially stable
- Dedicated professional staff including education staff leaders
- Location—mid-town; within Grand Central vicinity
- Programs—diversity for multiple interests and age groups
- Women’s League—strong
- B’nai Mitzvah—one child per date
- Services—regular minyan; kid-friendly; thought-provoking sermons

Weaknesses

- Services—too long; not user-friendly without Jewish education; soft attendance
- Congregation—not involved/non-participatory; lack of connection
- Conservative affiliation—orthodox and reform movements are stronger
- Location—mid-block, low visibility
- Facility—dated; limited space for catering
- Youth Programs—lack of development; weak post-b’nai mitzvah
- Development—lack of clear development/fundraising program/campaign
- Nursery School/Synagogue relationship—weak; lack of coordination
- Adult Education—lack of comprehensive nighttime classes/programs
- Reputation—lack of visibility/recognition

Opportunities

- Programming/Partnerships—opportunities to connect with USCJ, Jewish Theological Seminary, United Nations
- Demographics—growing LGBT Jewish community; numerous unaffiliated Jews; young professionals; empty-nesters moving into neighborhood
- Local Competition—Central Synagogue is full; 55th Street has limited capacity
- Congregational Skills—corporate and religious skills abound amongst members-tap those skills
- Communications—increase use of social media to better connect/network people in congregation
- Fundraising—set up formal development function to improve financial footing of SPS.
- Social Action/Community Service—formalize in religious school and strengthen throughout all aspects of synagogue life

Threats

- Demographics—decreased need to affiliate
- Conservative Movement—poor brand/loss of relevancy
- Competition—Central Synagogue, Chabad, synagogues where people have second homes (Hamptons, Florida)
- Nursery School—competition with other secular pre-schools; emergence of universal pre-K

Between the Fact Book, the congregational survey and the SWOT analysis, the Committee compiled data to assess the current state of SPS as a synagogue and as an organization. From that point, focus turned to what SPS wanted to be and what it reasonably could be as a synagogue and as an organization.

Mission & Vision

This Plan introduces an articulation of a Mission and Vision for SPS. The preamble to the comprehensive Mission/Vision Statement that follows was developed collectively by the Committee. The individual subjects' vision statements are the work of the respective task forces based on some preliminary work of the Committee with respect to each subject before the task forces began their work. The new mission/vision statement for SPS:

Sutton Place Synagogue is a vibrant congregation, affiliated with the Conservative movement, where people of all ages and backgrounds engage in learning Torah and acts of Tzedakah and participate in meaningful expressions of prayer, in an effort to strengthen their personal Jewish identity and to connect membership with the greater Jewish community and the global community in which we live.

Community/Chesed: We are a spiritual, sacred, and welcoming community where we come together to celebrate life's joys and reach out in times of need to those within our walls and beyond our doors.

Governance/Leadership: We strive to make the governing bodies of SPS more engaged in the synagogue's ongoing needs. This will be accomplished through the development of a leadership structure and culture that creates thoughtful ways for people to use their gifts and talents. The leadership will be encouraged to make a personal investment in our community and to create continuity of leadership that complements the professional team.

Torah & Learning: We foster a community of learners who seek to understand what it means to be Jewish and how to live a meaningful life that is rooted in Torah and Jewish tradition by providing outstanding schools for our youth and a variety of learning opportunities for people of all ages, backgrounds, and availability.

Finance/Development: We seek to maintain financial security through the generosity of our members and cultivate a strong donor culture among our members through personal connections that accomplishes both our short and long term goals which reflect our congregation's core values and create a sense of shared ownership and pride in our sacred community.

Tefillah: We believe our worship environment is rooted in traditional Jewish prayer that continues to awaken each individual's spiritual growth at our congregation.

Anchoring Themes

With a renewed sense of direction, the Plan now provides the road map to get there. Before delving into the specific strategies and actions that will move SPS towards its desired state, there are three broad themes that emerged from the collective task force effort. These common themes are so prevalent that all of the strategies in this Plan tie back to at least one of these themes. In no specific order, the three themes are:

- Building Stronger Community Connections
- Engagement of Congregants and Prospective Congregants in Jewish Living
- Development of a Robust Volunteer Leadership Structure

Building Stronger Community Connections

SPS needs to better understand who its congregants are and what they want from and out of their synagogue experience. Congregants must feel at home at SPS. This cannot be a building of strangers but should be a strong community, or at least strong micro-communities woven together by the SPS Vision. Examples of ways to gain this understanding, some of which will be discussed in greater detail below include:

- Welcome and embrace all new members;
- Serve as model members of the Greater New York and Jewish communities;
- Make sure the community knows who SPS is and that SPS will meet their needs
- Foster learning communities that focus on congregant's interests in order to make social and spiritual connections between adult congregants;
- Cultivate a generous donor culture amongst our members through personal connections thereby creating a sense of shared ownership and pride in our sacred community;
- Implement a listening campaign or audacious hospitality program to build strong relationships through a series of Shabbat dinners at people's homes;
- Create affinity groups based on educational interests. Obtain more extensive information about our members so that our database contains every family member's interests, schools attended, siblings, hobbies, passions, and occupations;
- Develop membership profile that is interest- and skill-based rather than committee-based;
- Create a family learning program for children from Pre-K to 2nd grade; and
- Create stronger communities within the religious school classes with programs such as Shabbat dinners, Shabbat services, and a B'nai mitzvah retreats.

Engagement of Congregants and Prospective Congregants in Jewish Living

As a greater understanding of congregants is developed and realized, the next key step is to engage congregants specifically in experiences of Jewish living. Examples include:

- Involve the under-engaged members in order to expand the core of committed members;
- Increase member engagement to help in times of need;
- Encourage our young to help others;
- Engage families with very young children to build the Kaplan Nursery School;
- Foster learning and social communities for all grades in the Jackson Religious School to create educational, spiritual, and social bonds between families;
- Enhance connection between Kaplan Nursery School families and SPS congregation as a whole;
- Broaden the base of people who attend Friday night and Saturday morning services;

- Deepen congregants' engagement with services through greater participation levels;
- Enrich the High Holiday service experience for more congregants increasing their level of participation in these services;
- Raise funds that affect and support the strategic vision of SPS guided by its core values as well as working with other committees to create an atmosphere that complements the giving culture and creates a meaningful experience for donors;
- Create on-boarding protocol for new members;
- Develop outreach to spread word about SPS services regionally, locally, and internally to prospective, new, and long-time members;
- Reach out to and create incentives for unaffiliated families/affinity groups (e.g. day school families, young professionals, alumni of USY/Ramah/Hillel) who, based on their shared experiences, would find SPS to be a meaningful prayer experience;
- Increase attendance/participation by "contracting" with affinity groups (e.g. Women's League, Men's Club, Board members) in the congregation to learn parts of service on specific Shabbatot;
- Create tools for learning that will increase people's capacity to participate in the service; and
- Organize a Shabbat speaker's series with meals in order to increase attendance at services.

Development of a Robust Volunteer Leadership Structure

Create an invested and developed leadership that in partnership with a the professional team executes a vision of a congregation. Only when everyone is speaking a shared, sacred language for the congregation will we be able to accomplish our many goals. One of the key elements necessary to understand and to more appropriately engage congregants will be to increase capacity among staff. This can happen with additional employees or with a properly aligned volunteer leadership structure that best supports the professional staff. Among the suggestions to make this happen include:

- Create an engaged leadership structure for the 21st Century;
- Form a governance committee to redraft the SPS constitution defining lay leadership (Board and Executive Committee) and staff purpose, structure, and accountability;
- Develop succession planning for orderly transition of leadership and to identify future leaders;
- Review committee structure² evaluating and identifying the areas of operations needing a standing committee, action, team or liaison; and
- Create a development committee to make recommendations to Board regarding giving and other fundraising strategies.

With the factual background and the aforementioned anchoring themes established, a deeper examination of the specific strategies and action items promulgated by each of the task forces is appropriate. To reiterate a comment from earlier in the document, some, perhaps many, of the following strategies and corresponding action items are presently undertaken at SPS. This Plan seeks to build on these efforts as cornerstones of the future SPS.

² This reference is to the current committee structure in place at SPS. There are recommendations throughout this Plan for the formation of new committees. The creation or development of those new committees as well as the continuation of existing committees is subject to a comprehensive review of the role of committees within the SPS governance structure. Some or all of the committees as currently constituted or proposed may evolve into task forces, action teams or some other structure to be determined. See "Governance" *infra*.