



---

**Temple Shalom Blueprint 2025**  
A Report from  
The Strategic Planning Task Force  
February 2020  
Executive Summary

## Introduction

### Temple Shalom Mission, Vision and Core Values

#### Mission

*Temple Shalom builds holy community; connecting our congregation to one another, to God, Torah, Israel and the Jewish people through worship, study, gathering and community service.*

**A note about vision:** The Temple Shalom Board of Trustees develops a vision for the congregation every 3-5 years and, in partnership with our members, staff and clergy, is accountable for steering our sacred community toward the future articulated by this vision, which we center upon Jewish tradition, informed by our membership, and the ever-evolving, modern environment in which we practice our Judaism.

#### Vision

**Collectively, we celebrate, care, and comfort. We will nurture connection, and commitment to Jewish life by:**

*Creating meaningful community and connections* - Temple Shalom will be a Kehillah Kedosha – a holy community, a dynamic, Jewish and Jewishly engaged presence; a place to create a strong network of relationships that connect and support one another; a home of safety, respect, compassion, love and welcome for everyone.

*Creating meaningful experiences to build a world of justice, wholeness and peace*— With deep and significant engagement with sacred texts, our Jewish learning compels us to act upon our commitment to social justice and to concerns within our hearts and in our world that intersect with core Jewish values.

*Creating meaningful worship experiences*— Through dynamic moments of communal prayer, we will raise spirits, lift hearts and empower voices to bring our community closer to one another and to God.

#### Core Values

Our values are shaped by concern and care for you and your family.

- ***We value community***- Your presence and unique gifts matter. With acceptance and love, our doors are open to you.
- ***We value volunteerism***— Meaningful belonging arises from a culture of participation and engagement within our Temple's life and leadership.
- ***We value social justice – Tikkun Olam*** - efforts to heal our world - through our actions, our friendships and programs; banishing loneliness, and bringing Shalom to those in need.
- ***We value lifelong, multi-generational Jewish learning***— From our earliest learners to youth and teens; to young adults and families with young children; to adult learners and the generations of learners within families, Jewish education is a lifelong pursuit. When learners of every generation are brought together, God's Presence rests among them.

## The Task Force

In July 2019, Temple Shalom President Rodney Schlosser contacted Stephanie Hirsh to discuss his vision for a strategic planning task force and her availability to chair it. Over several conversations, a scope of work for the task force was crafted, and President Schlosser secured five diverse members to serve on it. In addition, Executive Director Steve Lewis and Rabbi Andrew Paley served in ex officio roles.

Task force members include the following individuals. (A short bio accompanies each to represent the diverse experiences and relationships each has with Temple Shalom.)

- ▶ **Stephanie Hirsh, PhD:** Member since 1978. Highlights from involvement include Temple Board and Executive Committee; Rabbi Roseman search committee; Membership, Preschool, Religious School; Adult Education chair; and Strategic Plan co-chair, 2008. Lives in Far North Dallas (Public Service; Nonprofit CEO)
- ▶ **Abbie Alter:** Joined in 2013. Married with two children, Jesse (12) and Lucy (9). Jesse recently became bar mitzvah. Lucy attends Religious School. Highlights from involvement include co-chair of Young Families, volunteer and marketing rep for the Food Truck Palooza. Lives in West Plano. (Marketing and Communications)
- ▶ **Stephen Falk:** Joined in 2014. Married with three children, Alexa (10), David (7), and Samantha (3). The older two go to religious school and the youngest participates in Tots Academy. Highlights from involvement include current Board Treasurer, board member, Brotherhood board. Lives in Far North Dallas (Financial)
- ▶ **Diane Laner:** Member since 2002. Highlights from involvement include board member, nominating committee, Membership chair, Connections Council chair, Turtle Creek Chorale event co-chair. Lives in Far North Dallas. (Nonprofit Leadership; Marketing, Event Planning, Fundraising)
- ▶ **Beth Lasher:** Member since 1982. Highlights from involvement include Temple Board, Sisterhood Vice President (Membership), Pre-School and Religious School chair, Cantorial search committee (Lisa Levine), Strategic Planning Committee (2008), "Torah Pass It On," and Co-Chair Sisterhood Intra-Faith Luncheon. Lives in northwest Garland. (Counseling)
- ▶ **Irv Munn:** Member since 1983. Highlights from involvement include Board Treasurer, Board Vice-President and Board President, chairperson of the Temple Shalom Endowment Fund Board of Trustees, and chair of the Annual Golf Tournament. Lives in Far North Dallas. (Financial, Nonprofit Leadership)

The overall purpose of the task force is to ***propose a five-year plan that will advance Temple Shalom's mission and serve the current and projected priorities, finances, and needs of Temple Shalom's congregation.***

The task force agreed to deliver its report to the board of trustees shortly after the first of the year. As a result, the task force adopted an aggressive timeline that required twice monthly meetings and more. **The work could not be accomplished without the support and assistance of many individuals and groups, and the task force extends specific appreciation to the following:**

- ▶ President Rodney Schlosser for offering his vision, charge and awarding autonomy to the Strategic Planning Task Force.
- ▶ Executive Vice President Debra Levy-Fritts for leading the board effort to refine the Temple mission and add new vision and value statements which will guide development and implementation of the strategic plan.
- ▶ Executive Committee, Board of Trustees, Past Presidents for engaging in collective and individual workshops/conversations to inform the plan.

- ▶ Rabbi Andrew Paley and Executive Director Steve Lewis for tremendous support and engagement with the Strategic Planning Task Force.
- ▶ Temple Clergy and Staff, in particular Cantor Avery, Joy Addison, Marcy Finn, Karen Thompson and Elise Donosky, for candid and supportive input into the planning process and recommendations.
- ▶ Resources for Learning, specifically, Dr. Lisa McCulley for leadership on the design, execution, and analysis of the Temple Member Survey.
- ▶ URJ Consultants, in particular, Deborah Niederman, Gila Hadani Ward and Julie Lambert, for consulting on strategic planning process, data analysis, and URJ resources.
- ▶ Texas A&M Commerce, specifically, Dr. Zach Palmer for qualitative analysis of data gathered from the congregation workshop and under 45 focus group.
- ▶ Individual members for caring deeply about the future of Temple Shalom and sharing time and insights to inform the planning process.

**Call to Action:** The task force seeks passage of the following resolution from the Temple Shalom Board of Trustees and offers the following motion for the Board to address:

*“We move that the Board of Trustees accepts the priorities and recommendations of Blueprint 2025 and commits to developing an implementation plan that will serve as the focus for the work of staff and board for the next five years.”*

## Recommendations

The task force concludes with eight recommendations. Each recommendation is accompanied by a rationale, key staff support, and three to four specific actions that align to it. The task force has identified in bold italics the specific actions it recommends be addressed in the next 18 months.

1. **Programming:** Reduce number and increase quality of programs to improve engagement, retention and recruitment.
2. **Member Connections and Engagement:** Establish structures that connect members socially and build community.
3. **Families with Children (0-18):** Reimagine formal and informal education and social programming for this demographic.
4. **Membership Structures:** Set membership structures, fees, and benefits that improve recruitment and retention of members.
5. **Communication:** Improve ongoing internal and external communications vehicles so that staff and members have the information they need to connect, make decisions, and engage.
6. **Finance:** Establish budget targets and alternative funding plans for securing dollars to implement strategic priorities.
7. **Leadership and Governance:** Invest in new governance and administrative structures that clarify roles and responsibilities and lines of accountability, communication and authority. This will position everyone for greater success.
8. **Human Resources:** Adopt a staffing plan to maximize resource efficiency and effectiveness of operations.

**If you are interested in reading the entire report; please contact:**  
**Steve Lewis, Executive Director**  
**slewis@templeshalomdallas.org**