

Secular Jewish Circle Strategic Plan

2007-2012

Background and Mission

The Secular Jewish Circle of Puget Sound (“SJC”), established in 1994, welcomes all who identify with the history, culture, and future of the Jewish People.

SJC’s mission is to bring people together to celebrate Jewish culture and heritage in a non-religious setting. We are committed to building our community and improving our world through cultural and educational activities and social activism. We take tremendous pride in the values and culture developed by our people through the ages. We seek to preserve and strengthen our connection with this heritage, while further developing our Jewish historical and cultural traditions in the modern world.

During 2005 we celebrated our tenth anniversary as a community. In the months since then, we have spent time in conversation reflecting upon where we’ve been, where we are, and where we want to go. We’ve learned that we are happy as a community. We are pleased with our programs and services – our growing education program, social action initiatives, community service, holiday celebrations, and social programs. We’ve demonstrated to each other time and again that we are indeed a community of caring individuals, from reaching out to each other in times of need, to celebrating each other’s joyous moments, to finding that we want to spend more unstructured social time just getting to know each other. At the same time, we’ve identified several areas for improvement. Achieving these improvements in our administrative capacity requires more financial support than we currently generate through fees, dues, and fundraising.

We’ve accomplished a great deal with a small amount of financial resources. We’ve intentionally kept our dues and program fees low in order to be accessible to anyone who wants to join. We’ve relied heavily on our members to volunteer their ideas and their time to provide leadership and to support our programs and operations. We’ve become a sophisticated organization in terms of what we offer our members, yet we lack sufficient administrative structure to support our programming and operations. Many of the tasks required to run the organization are challenging and uninteresting to our member volunteers and therefore better suited to some level of paid staff. Our community desires the services of a professional Madrikha (spiritual leader). Ultimately, we believe our organization would benefit from the leadership of a paid executive director, who can support our volunteer leadership.

Our volunteer system is in need of updating and ongoing management. We need a more effective and efficient way to identify volunteers’ interests and availability, describe our need for volunteers, and match people to tasks. We need a leadership succession plan and system that allows us to identify potential future leaders and offer them opportunities for development.

We also seek to grow our community in ways that expand the diversity of our members and to build more connections with other Jewish and secular communities in the Puget Sound area. We

believe such growth will afford new opportunities for our members to engage in educational, social action, and community service activities consistent with our mission.

Our needs fall into five broad categories: financial management, structure, fundraising, administration and community. In each, we've identified goals and actions we believe will help us continue to build a healthy, vibrant community.

Goals and Actions

The following goals and actions will guide us over the next five years as we build the administrative support structures necessary to sustain us as a community and we continue to learn and grow together. The Steering Committee is responsible for the implementation of and monitoring progress on achieving these goals and actions. All Steering Committee agendas will have a section dedicated to updates on and discussion of this plan.

- ***Short Term “Breathing Room”***
- **Goal: Volunteer oversight at SJC is effectively performed, while the Steering Committee focuses on the formation and functioning of various committees outlined below.**

- ***Financial Management***
- **Goal: SJC will maintain ongoing, responsible fiscal management of the organization that is accountable to SJC membership.**

- ***Long Term Structure***
- **Goal: SJC will maintain an organizational structure that is easy to navigate, sufficiently flexible so that members can determine their own levels of involvement, and sufficiently stable so that sound organizational decisions can be made.**

- ***Fundraising***
- **Goal: SJC will maintain adequate financial resources to sustain an exciting and growing array of programs and services for members' benefit.**

Implementation and Next Steps

Implementation of this plan requires membership involvement and some restructuring of our volunteer leadership and committees.

Steering Committee and Committee Structure and Responsibilities

The primary responsibility for implementing this plan lies with the Steering Committee and the committees listed in this plan. Effective communication between the sub-committees and the Steering Committee is crucial. Therefore, it is recommended that each sub-committee be led by a Steering Committee member, and that every regular Steering Committee meeting include sub-committee reports. The Steering Committee and each sub-committee should be formally chartered with a written document that describes the committee's purpose, role, and responsibilities. The Steering Committee is charged with monitoring overall progress on the plan and conducting a mid-plan review to ensure that goals and objectives reflect changing needs and realities.

Phase I: 2007-2009

Short Term “Breathing Room”

Goal: Volunteer oversight at SJC is effectively performed, while the Steering Committee focuses on the formation and functioning of various committees outlined below.

Action: Hire a part time Volunteer Coordinator for a minimum two year contract who will:

- Develop a volunteer system which enables members to devote time and skills that are both beneficial to the organization and fulfilling to the individual.
- Ensure that volunteer positions are clearly defined in terms of role, tasks, and time commitment.
- Recruit volunteers for defined positions and tasks.
- Where volunteer committees are appropriate, write a charter for each committee that describes the committee's purpose, role, authority, and tasks.
 - Include a template for each committee to develop an annual workplan.
 - Identify possible leadership for committees and approach individuals to serve in these roles. Help committee leads recruit members to serve on committees.

- Compile a “recipe book” of “how to” information for organizing various SJC events, such as Passover, Shabbat, Rosh Hashanah, etc.

Financial Management

Goal: SJC will maintain ongoing, responsible fiscal management of the organization that is accountable to SJC membership.

Action: Establish a Finance Committee, led by SJC’s treasurer and comprising SJC members with financial and/or business experience, with responsibility for prudent fiscal oversight and management of the organization’s financial resources. Specifically, this committee will:

- Ensure that SJC’s budgeting process effectively projects annual costs of running the organization and that SJC’s financial monitoring system is appropriately categorizing revenues and expenses.
- Develop appropriate reporting templates for the SJC Steering Committee and membership.
- Establish and implement a regular schedule for the Steering Committee and membership to receive reports on the financial health of the organization.
- Determine the level of financial reserve desired.
- Establish annual fundraising goals and determine what portion of annual revenues should come from membership dues, program fees, and fundraising.
- Structure membership dues so that SJC remains accessible to all.
- Recommend sound investment strategies for Steering Committee approval.
- Establish and maintain adequate insurance coverage.
- Educate members about SJC finances and the basis for dues increases.
- Explore costs associated with either rental or purchase of a property to house the SJC.
- As needed, engage the services of an accountant to advise on the integrity and effectiveness of SJC’s financial systems.

Long Term Structure

Goal: SJC will maintain an organizational structure that is easy to navigate, sufficiently flexible so that members can determine their own levels of involvement, and sufficiently stable so that sound organizational decisions can be made.

Action: Establish a short term Structure Committee to recommend an optimal structure to meet SJC's needs. Specifically, this committee will:

- Determine the ideal configuration of paid staff (employee and contracted) to support the organization's needs for administration, programs, services and spiritual leadership.
- Collaborate with the Finance Committee to cost out its staffing recommendation, including appropriate salary levels, annual increases, taxes, benefits, occupancy and other infrastructural considerations.
- Once a structure is approved, develop appropriate job descriptions.
- Clarify who will perform staff supervision.
- Recommend a recruitment timeline, taking financial considerations and fundraising imperatives into account.
- Recommend the composition of hiring committee(s).
- Engage the services of a consultant to develop appropriate personnel policies.
- Recommend an ideal SJC Steering Committee composition to reflect current SJC needs.

Fundraising

Goal: SJC will maintain adequate financial resources to sustain an exciting and growing array of programs and services for members' benefit.

Action: Establish a Fundraising Committee and fundraising strategy to meet annual fundraising targets. Specifically this committee will:

- Participate in Finance Committee discussions to determine annual fundraising targets.

- Create annual fundraising plans that include an optimal mix of strategies with sub-goals, to include an annual campaign, benefit event, and foundation grants, among others.
- As needed, engage expertise outside SJC to assist with developing and/or implementing a fundraising plan.
- Collaborate with the Finance Committee to explore Capital Campaign prospects to fund rental or purchase of an SJC property.
- Play a leadership role in implementing the fundraising plan, drawing upon staff (if established), Steering Committee members and the broader membership as appropriate.

Phase II: 2009-2012

Administration

Goal: Maintain policies and procedures protective of the organization, its employees, volunteers, members and guests.

Action: Assign the following tasks (if still deemed relevant based on a mid-plan review) as appropriate based on prior decisions about staff/volunteer functions:

- Research standard operating policies and procedures implemented by non-profits and develop a plan for writing and implementing those needed for SJC, including, but not limited to:
 - Remaining Human Resources considerations
 - Membership Rights and Responsibilities
 - Volunteerism
 - Emergency Preparedness
- Develop a step-by-step how-to guide for all the functions of SJC including administrative and programming.
 - Establish, maintain, and periodically review a list of administrative roles and responsibilities.
- Assure adequate development, maintenance, and security of data and communication systems.

- Make the database more available and user-friendly and ensure that it supports needs around member demographics, dues and program payments, and volunteerism.
- On a regular basis, assess the effectiveness and efficiency of paid staff versus volunteer workers and determine possible roles and functions that need to be addressed differently.

Community

Goal: Maintain a sustainable community that is welcoming and open to a diverse population.

Action: Integrate the following responsibilities (if still deemed relevant based on mid-plan review) into staff or committee functions as appropriate based on prior decisions about staff/volunteer roles:

- Develop and implement a leadership succession plan and strategy.
- Hold an annual leadership retreat.
- Explore options for leadership development through the Jewish Federation, SHJ, and connecting with the Portland and Vancouver Secular Humanistic communities (particularly for Committee leads).
- On a regular basis, assess the effectiveness and efficiency of communication systems and determine what improvements need to be made.
 - Create a Communications Committee responsible for developing effective communication tools for members.
 - Develop a mechanism for obtaining member feedback on satisfaction with communication systems.
 - Identify new methods for communication and develop proposals for Steering Committee review and approval (e.g., electronic bulletin board, member chat rooms, etc.).

- Increase membership by a net of XX households per year.
 - Develop and implement an outreach strategy that targets different populations to increase and maintain diversity within our community.

 - Utilize current members to attract and recruit new members.

 - Give members tools to explain SJC to others, such as brochures and business cards.

 - Develop and implement better ways to educate potential and new members about what SJC membership offers and the many ways they can participate in the community.

 - Develop a new member host household who volunteers to help a new member household get acquainted with SJC.

- Decrease the number of households who do not renew their annual membership by ____ %.
 - Conduct exit interviews with households who do not renew their membership.
 - Analyze reasons that members leave and report trends to the Steering Committee.

- Increase awareness of SJC within the general Jewish, Secular, and Freethinkers communities in the Puget Sound region.
 - Develop a relationship with the Jewish Federation of Greater Seattle.

 - Identify opportunities for media coverage, either through articles in local newspapers or live coverage of events.

 - Publicize SJC events in community calendars, both in print and on line.

 - Seek opportunities to partner with other Jewish and Secular organizations for education, social action, and community service.

- Sustain current programs and services while increasing opportunities for member-driven program development
 - Assess interest in exploring end-of-life issues.
 - Assess interest in developing a membership music program.
 - Increase opportunities for the community to participate in tzedekah and tikkun olam opportunities
 - Conduct ongoing research with current members to determine their level of satisfaction with SJC programs and services, and their overall satisfaction with their own involvement.
 - Ensure that current members have an effective forum for raising questions and concerns and for developing ideas for new programs or services.

- System needs to ensure that inquiries are responded to within a set timeframe.
- System needs to track outcome of inquiries.