

# STRATEGIC PLAN DEVELOPMENT AND ORGANIZATION

## 1. Overview

In its more than 100-year history, Congregation Agudas Achim (CAA) has never before had a Strategic Plan of this scope and depth. Previous attempts to develop strategic plans were not as comprehensive as this effort and did not come to fruition for different reasons.

Many approaches can be taken during the development of strategic plans and strategic plans can take different formats. Many strategic plans are developed and then basically forgotten, being relegated to desk drawers or bookshelves, attracting dust from lack of use.

We were determined to have a plan that will avoid a similar fate.

We consider the Five-Year Strategic Plan, a working document that evolves and is being adapted to changes, expected and unexpected. This will keep the Strategic Plan a useful and usable document. If this plan was developed more than two years ago, it is unlikely that its developers would have forecasted a pandemic that has had a profound impact both short-term and longer-term on how an organization and its members operate. While it is a five-year plan, we have incorporated procedures, described in the Strategic Plan Uses, Monitoring, Evaluation, and Annual Updating Section of the Plan how the plan will be monitored and updated annually, so it remains current and relevant.

Many strategic plans have lofty goals but are hard to implement because they do not provide concrete, operational guidance on how their goals can be implemented and what the organization needs to have to assure implementation. We assure our Strategic Plan will be used continuously, from the start, by all departments for all activities and purposes. We do this by making goals clear and tactics concrete and implementable. We identify necessary resources and who should be involved. We require continuous monitoring and improvement. Our Strategic Plan is basically a map with all of the roads and destinations clearly marked.

Using best practices in strategic plan development and implementation, we also provided mechanisms for institutionalizing the plan, making it a routine component embedded in CAA operations, through the establishment of a small Strategic Plan Committee whose responsibility will be to monitor its use and take stock of updating it annually. Our intent is that the Strategic Plan will become a key building block in our operational and reporting system, as shown below.



## 2. Development Process

The Five-Year Strategic Plan development initiative took place between November 2020 and March 2021.

The strategic planning Group initially consisted of ten members, appointed by Gary Susswein, CAA President-Elect.

In addition to Gary Susswein, President-Elect, Chair, members also included:

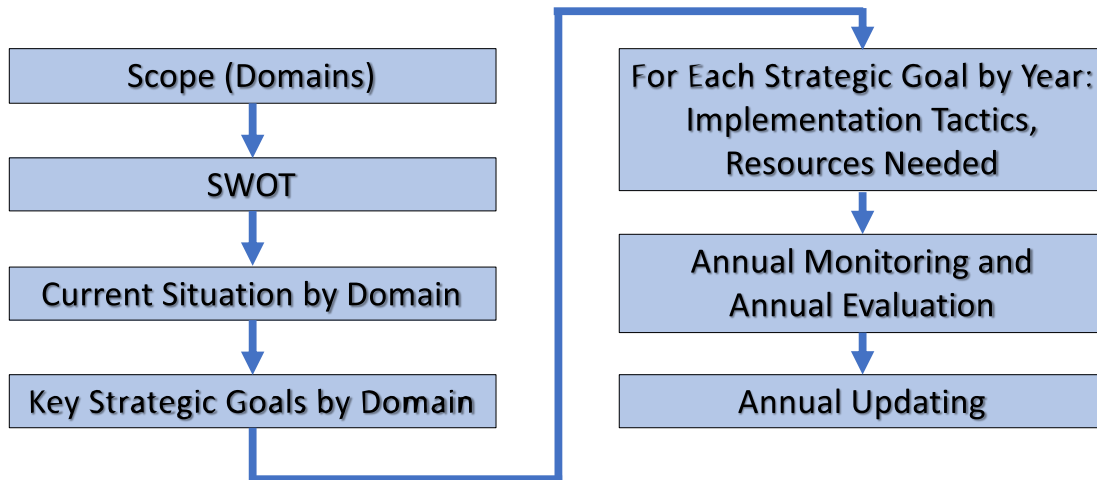
- Rabbi Neil Blumofe
- Neal Blauzvern, VP Facilities
- Debbie Cohen, VP Membership
- Robert Cullick, VP Development
- Susan Klein, VP Membership
- Robert “Bobby” Lopez, At large Board Member
- Ester Smith, Treasurer
- Joe Steinberg, Past President’s Representative

The strategic planning process was led by Gary Susswein - chair and Ester Smith, an experienced strategic plan development facilitator.

The group met every two weeks virtually, given the Covid pandemic, to present, review and discuss strategic plan assignments that were developed by each of the group members in between the meetings based on detailed instructions.

The Strategic Plan was developed in a series of steps illustrated in the graph below.

# Strategic Planning Process



The first task was to define the scope of the Strategic Plan. Different approaches can be used to define the scope of a strategic plan. The approach we used is a holistic systems approach. We consider Congregation Agudas Achim (CAA) a system composed of different domains all of which interact with each other, impact and are affected by each other. The system also interacts with outside entities. Consequently, addressing all domains (system components) is imperative for charting a longer-term course for the system.

The domains we specified represent CAA's areas of operational area of activity, and include:

- Leadership
- Religious Life
- Membership and Member Engagement
- Education:
  - Youth and Education
  - Adult Education
- Operations
- Facilities, Security, and IT
- Financial Operations and Management
- Fundraising
- Communications and Marketing
- Relationship with Campus and Community Partners and Israel

Following the specification of the domains the plan will address, members conducted a Strengths – Weaknesses – Opportunities – Threats (SWOT) analysis of each of the domains. The results of the SWOT analysis, prepared by each group member, were aggregated by domain and reviewed in a December 21, 2020 meeting. The SWOT statements, representing Strategic Planning Group members' perceptions,

have been included verbatim in order to retain their authenticity and flavor. The SWOT analysis for each domain is included in the Strategic Plan's Domain sections.

Strategic Planning Group members were next assigned to individual domains to prepare a description of the "Current Situation" for the respective domain. The descriptions of the current situation serve as a baseline/anchor point for determining the direction CAA wants to go in the next five years. Each Domain section of the Strategic Plan has a Current Situation description. Group members were assigned to domains based on their experience with and involvement in respective areas, as follows:

- Leadership: Rabbi Neil Blumofe and Gary Susswein
- Membership and Member Engagement: Debbie Cohen, Susan Klein
- Religious Life: Rabbi Neil Blumofe and Gary Susswein
- Education:
  - Youth and Education: Adra Lustig, Director, Youth & Education\*
  - Adult Education: Brooke Hersh-Thompson, VP Education\*
- Facilities, Security, and IT: Neal Blauzvern and Robert "Bobby" Lopez
- Operations: Joe Steinberg
- Fundraising: Robert Cullick
- Financial Operations and Management: Ester Smith
- Communications and Marketing: Robert Cullick
- Relationship with Campus and Community Partners and Israel: Gary Susswein and Neal Blauzvern

*\*joined the Strategic Planning Group in March 2020,*

the preparation of a SWOT analysis and descriptions of the current situation, group members were asked to develop for their respective domain, key goals and tactics, determine the timeline for implementing each over the five-year span, identify resources needed for implementing the tactics, and identify persons involved by title/position. A special form was developed for recording this information. This task, considered the heart of the Strategic Plan, involved several rounds of development, review, discussion, examination and elimination of goal and tactic duplication within and across domains, and refinement. While each group member was responsible for a respective domain(s), one of the iterations involved review and commentary from all group members. Following each round, the goals, tactics, timeline, resources, and individuals involved were refined based on group member comments and suggestions. We also conducted a gap analysis involving both the domains specified and the goals stated. For example, we expanded the Lay Leadership Domain to include Rabbinic and education leadership and added an appropriate goal. As part of this process, we also added a separate Education Domain composed of the Religious School and Adult Education subdomains. The goals, tactics, timeline, resources and persons involved for these two subdomains were developed with assistance by two education professionals – Adra Lustig and Brooke Hersh-Thompson – who were added to the Strategic Planning Group.

The CAA President, Director of Operations, Associate Rabbi, relevant committees and some CAA staff received updates on the plan. For example, the Finance Committee devoted part of one of its monthly meetings to a presentation and review of the Financial Management and Operations Domain SWOT analysis, description of the current situation and goals and tactics.

Strategic Planning Group members reviewed the draft plan and discussed it in one of the concluding meetings of the group. The plan was revised, based on group members' suggestions and recommendations and its final version was presented and discussed in the final meeting of the Strategic Planning Group.

The Strategic Planning Group prepared a roll-out schedule.

The CAA Five-Year Strategic Plan was presented to the Board during the April 22, 2021 meeting and approved.

The CAA Five-Year Strategic Plan was also presented to the congregation as part of the annual congregational meeting in May 2021.

### **3. Strategic Plan Organization**

The principle underlying the organization of the plan is how to make it most useful to its users.

This principle is exhibited in the organization of the content of each domain and in the clear and explicit operational guidance of how the plan can be used, monitored, evaluated and updated.

Each domain and subdomain are documented in three sections:

- SWOT analysis for the domain;
- Description of the CAA activities, accomplishments, challenges, and issues in the respective domain in 2020-21;
- Goals, Tactics, Timeline, Resources Needed, and Persons Involved presented in a format that makes it easy to follow.

The SWOT analysis and the description of the domain's situation in 2020-21 provide a baseline for the goals and tactics to be implemented over the 2021-22 to 2025-26 period, illustrating where we are and where we want to go.

The Strategic Plan Uses, Monitoring, Evaluation, and Annual Updating section of the plan creates an infrastructure that facilitates its use, tracking, and updating, and makes it a living document.