

**Jewish Congregation of Venice
YEAR 2 ACTION PLAN**

PRIORITY GOAL #1: Increase the capacity of volunteer and staff leadership and their use of practices that promote inclusion and inquiry.

Strategy 1A: Invest in leadership development.			
ACTION STEPS	PERSON RESPONSIBLE	COMPLETED BY	STATUS
1. Onboarding / orienting new board members: <ul style="list-style-type: none"> ▪ Launch a formal, annual orientation that engages the full board and includes an update on roles/responsibilities of chairs, committee policies and procedures and any Bylaw changes, with a social component following. 	1 st Vice President (Officers, Committee Chairs)	April 1, 2026	
2. Recruit a group of up to 2 board members to participate in each Gulf Coast Board Institute (October & February) until all have completed; send new board members thereafter and encourage participation by individuals being considered for future board service.	Board President	Fall, 2026	

Strategy 1B: Clarify future leadership structure and roles.			
ACTION STEPS	PERSON RESPONSIBLE	COMPLETED BY	STATUS
1. Submit recommended structure/Bylaws changes to Board for approval (provide draft amended bylaws in board meeting packet).	Ad hoc Structure Committee Chair	December 2025	Completed
2. Present recommended structure/Bylaws changes to congregational membership (provide draft amended bylaws 14 days in advance of the meeting).	Board President (Ad hoc Structure Committee Chair)	January 25, 2026	
3. Complete full review of bylaw every three years	Ad hoc Structure Committee	January 2029	

Strategy 1C: Explore potential for adding administrative staff.

ACTION STEPS	PERSON RESPONSIBLE	COMPLETED BY	STATUS
1. Research and report the benefits and costs of adding administrative staff (i.e. job descriptions/duties, FT/PT models, salary levels, etc.) and report to Board for discussion.	HR Committee Chair (HR Committee)	February 28, 2026	
2. Develop a job description for a part-time custodian and submit to Board for discussion.	Buildings and Grounds Chair	February 28, 2026	

Strategy 1D: Clarify and codify organizational practices.

ACTION STEPS	PERSON RESPONSIBLE	COMPLETED BY	STATUS
1. Research examples of synagogue policy & procedures manuals to determine the scope of what should be included and determine next steps.	Strategic Planning Committee	January 31, 2026	
2. Using research, create a policy and procedures manual	SPC, Comm Chairs, Admin, Officers	February 28, 2026	
3. Capture all policy changes Board makes and produce annual report of these changes	Secretary	Ongoing End of fiscal year	

PRIORITY GOAL #2: Grow the size and engagement of JCV's membership.

STRATEGY 2A: Update branding based upon JCV's new strategic direction			
ACTION STEPS	PERSON RESPONSIBLE	COMPLETED BY	STATUS
1. Unified messaging: <ul style="list-style-type: none"> ▪ Draft unified messaging and a tagline that is inclusive (in lieu of a name change). ▪ Test draft messaging with the target audience (50's-60's newcomers) and refine as needed based on feedback. ▪ Share revised draft messaging at Congregational Meeting and solicit feedback in a structured way. ▪ Make further refinements as needed based on feedback. ▪ Present final messaging recommendation to the full board for approval. 	Strategic Planning Comm	January 1, 2026	Completed
	Communications Comm	March 15, 2026	
	Communications Chair	March 22, 2026	
	Communications Comm	April 1, 2026 April 8, 2016	

STRATEGY 2B: Cultivate new members (Target = net increase 15 for year)			
ACTION STEPS	PERSON RESPONSIBLE	COMPLETED BY	STATUS
1. Determine whether a marketing plan, communications plan or social media plan shall be the first step <ul style="list-style-type: none"> ▪ Research each level of planning ▪ Determine whether an outside consultant is needed to launch chosen plan ▪ Based upon trial of using a consultant for social media for the Food Festival, develop a comprehensive external marketing plan including print, social media, etc. and incorporate assistance of Federation. ▪ Track achievements of plan. 	Strategic Planning Comm	December 28, 2025	Completed
	Strategic Planning Comm	December 28, 2025	Completed
	Communication Comm	April 15, 2026	
	Communication Comm	Annually	
2. Clarify benefits of membership: <ul style="list-style-type: none"> ▪ Identify which programs/activities/benefits should be for members and which should be available to non-members for a charge. ▪ Present recommendations to Board. 	Adult Learning, Membership, Men's Club, Sisterhood)	January 28, 2026	
	"	February 11, 2026	

3. Review brochures and printed material used for marketing purposes and revise for updated look and updated information.	Communication Comm	May 1, 2026	
1. Engage with Federation to benefit our efforts to cultivate new members.	Board SPC (Rod Margolis)	Ongoing	
2. Find funds for events, pursue grant opportunities through Federation, Gulf Coast Community Grants, etc. <ul style="list-style-type: none"> ▪ Establish ad hoc grant committee and grant committee chair ▪ Identify granting agencies with funds available for our purposes ▪ Explore availability of grant writers 	Board President Ad Hoc Grant Committee	February 1, 2026 March 1, 2026 March 1, 2026	

Strategy 2C: Engage and retain existing members.

ACTION STEPS	PERSON RESPONSIBLE	COMPLETED BY	STATUS
1. Facilities planning: <ul style="list-style-type: none"> ▪ Working as a cross-functional team (House & Grounds Comm, plus chairs of Ways and Means, Memorial Park, Security) develop a maintenance plan that takes into account the existing 2019 engineering report. ▪ Working as a cross-functional team (House and Grounds Comm, plus chairs of committee hosting events), draft a capital Improvement Plan that takes into consideration Congregant Focus Groups and overall event planning for the JCV. ▪ Present Capital Improvement Plan to Board for approval. 	House and Grounds Chair (team)		Completed
	House and Grounds Comm Comm Chairs hosting events	September 1, 2026	
	House and Grounds Chair	September 9, 2026	
2. Working as a cross-functional team (Events Comm and chairs of all committees/functions hosting events), develop an Annual Events Program Plan taking into account Focus Group findings.	Events Committee Chairs of committee hosting events	June 30, 2026	

PRIORITY GOAL #3: Enhance the financial viability and acumen of the JCV.

Strategy 3A: Coordinated fundraising.			
ACTION STEPS	PERSON RESPONSIBLE	COMPLETED BY	STATUS
1. Review sources for annual income streams through fund raising	Ways & Means Committee	September 9, 2025	Completed
a. Apply and develop timeline for <i>Community Foundation of Sarasota Giving Challenge</i> (noon April 15, 2026- noon April 16, 2026) as new source of funding.	W & M Committee	December 31, 2025	Completed
b. Research the concept of giving levels for implementation.	W & M Committee	March 15, 2026	
2. Develop a comprehensive 1-Year Fundraising Plan that clearly defines the purpose of each donation opportunity; establishes specific fundraising goals for operations, capital, and endowment; and lays out a detailed plan with tasks and timelines for achieving each goal.	Ways & Means Chair (expanded Committee)		Completed
2. Year 2 plan development		May 31, 2026	
3. Roll out ways to donate/invest in JCV with unified, clear messaging to the congregation.	Ways & Means Chair (expanded Committee + Communications)		
▪ Ahava Society - \$5,000 minimum gift. Society will include recognition.		March 22, 2026	
▪ Provide session on “Ways to Give” for our members		January 15, 2026	
4. Present annual Giving Plan for Year 2 of the Strategic Plan to Board.	Ways & Means	May 13, 2026	

Strategy 3B: Donor recognition.

ACTION STEPS	PERSON RESPONSIBLE	COMPLETED BY	STATUS
1. List donors monthly in the congregational newsletter for all types of donations received, with a separate section recognizing High Holiday donors in November.	Ways & Means Chair (W & M Committee, Website Committee)	Monthly (Begin Sept 2026)	
2. Tree of Life: <ul style="list-style-type: none"> ▪ Endowment to present to Board revised donor categories and means of recognizing donors. 	Endowment Committee	April 30, 2026.	

Strategy 3C: Coordinated financial planning and budgeting.

ACTION STEPS	PERSON RESPONSIBLE	COMPLETED BY	STATUS
1. The Finance chair will review all procedures to determine if further refinement is necessary.	Treasurer	January 31, 2026	
2. Prepare a FY annual calendar of financial management obligations.	Treasurer	June 1, 2026	
3. Prepare a document for committee chairs to be included in JCV Policies and Procedures manual that explains the budgeting process and deadlines.	Treasurer	March 15, 2026	