

Tikvah 2020 Draft Report

Ohavi Zedek Synagogue Strategic Planning

Revised 10/27/09

Vision

Ohavi Zedek Synagogue seeks to be a vibrant, creative, egalitarian congregation, meeting the educational, worship and community needs of our members and neighbors in northern Vermont. *Ohavi Zedek* is Hebrew for Lovers of Justice. We at Ohavi Zedek Synagogue seek to live up to our name by recognizing that the righteousness of justice is grounded in our values of loving-kindness, self-respect and mutual support.

Mission

The central command of *Torah* is to love our neighbors as ourselves because each human being is created in the image of God. From our sages we learn the values of Judaism's spiritual path of *Torah*, *Avodah*, and *Gemilut Chasadim*.

Torah includes the foundational wisdom of *Hebrew Scriptures* and its interpretation by our sages through the millennia, into our own day. At Ohavi Zedek Synagogue, *Talmud Torah* is life-long learning. We respectfully engage the tradition of our sages and, together, shape it for our own time.

Avodah, originally the Temple rite, became services of prayer when the Temple was destroyed two thousand years ago. At Ohavi Zedek Synagogue, we are devoted to celebration of *Shabbat*, the full range of festivals throughout the year, and daily services.

Gemilut Chasadim is the sharing of loving-kindness with each other and our neighbors, intentionally through concrete programs, as well through a standard of personal interaction on a daily basis. We expect of ourselves righteous living (without being self righteous)!

Everyone is welcome at Ohavi Zedek! The vision of our future that follows in this report flows out of our history as a congregation, the work of past planners in the mid-1990s, and the participation in open conversations through 2008 and 2009 by many of our members in parlor meetings, town meetings, and leadership discussions.

We look towards the year 2020 with great hope. We called our planning process *Tikveh 2020*, *tikveh* being Hebrew for hope. We invite you to add your voice as together we write the next chapter in the story of the Jewish people in northern Vermont.

Barukhim ha'ba'im! Welcome to Ohavi Zedek Synagogue!

DRAFT

I. Goal: Membership and Outreach

Vision

The Membership and Outreach Committee seeks to actively engage our current members and attract new members. As a vibrant, welcoming, Jewish community, we embrace the values of spiritual growth, social justice, education caring and connectedness. We strive to meet the needs of our diverse, multigenerational congregation. We will work to develop multiple ways for members to connect. We will use our website, bulletin and all of our media to communicate these opportunities for “making the connection.”

Strategy

The Conservative movement has an aging membership. Its affiliation has been declining. In order to reverse these trends, congregations need to proactively welcome a new generation of members. These members tend to get married later and have their first child at an older age than a previous generation of Jews (and much later than the average American family). Due to this trend, young families join congregations later. They want to know that their talents, gifts and aspirations are understood. They want to make a difference.

How will OZ respond? OZ seeks to attract young families. It believes that there is a large community of unaffiliated Jews in Burlington. OZ leaders believe we must first look to enrich our own community. To this end we are seeking to revitalize adult education* (*see lifelong learning*) and worship (*see worship task force*).

The worship task force understands that our future members are looking for more spirituality in services (Pew Study, S3K study). They are less focused on denominational labels. OZ values traditional values and rituals. It also values progressive thinking and program innovation. Our new OZ vision (“We expect of ourselves righteous living —without being self righteous!”) does not focus on the label “Conservative” synagogue but talks about its core values of openness and humility.

OZ has a legacy of commitment to social justice. OZ should build a 12-month calendar that provides a range of ways that children and families can engage in social justice. This can be one of the lead brand identities (Tzedek and Tzedakah campaign) for OZ.

Leaders also want to help each person find their home at OZ. One of the key strategies will be the “OZ Wants to Know about You” campaign. This will utilize a membership profile. Membership leaders will work with staff to try to meet with as many of our members as possible one-to-one to learn the following:

- How do they feel about OZ?

- What are their needs?
- What role would they like to play at OZ?

In order to ensure this focus on member and volunteer engagement, OZ will need to support recommendations from other task forces. OZ needs an executive director and a program director to help facilitate this strategy. It also needs to track key community building initiatives as part of the board practice.

1. Critical Issue: Engagement

Inspire members to greater engagement. Find new ways to attract the scores of unaffiliated Jews around the greater Burlington community to get involved with and/or join OZ.

Strategy

Seek out underrepresented demographic groups. Recruit and develop OZ's Membership & Outreach standing committee and other ad hoc teams.

Recommendations

OZ should employ a full-time executive director to support its volunteer base. OZ's volunteer base will need to expand to provide in reach and outreach programs.

Recommendations

Make the OZ's website and technology offerings more informative, timely and robust so that our members routinely make more frequent visits to the website. Use our technology offerings to further member engagement. Develop a more inviting home page. Provide links to interesting Jewish sites. Invite guest writers. Showcase events with photos and stories that demonstrate how OZ is putting its vision into practice. Explore ways to deepen relationships. Encourage threaded conversations.

2. Critical Issue: Engaging Worship

Expand the core of those who worship and study. Membership is dependent on the worship and education task forces to develop new approaches to achieve these goals. Future members will want to see a community engaged in passionate learning and joyful worship.

Strategy

A welcoming Shabbat worship community is critical to membership growth (See Worship Task force).

Recommendations

Work to inspire members of our congregation to get further engaged in synagogue life. Increase attendance at Shabbat **services** and **Kiddush**. Shabbat morning services should be lively and spiritual. There will be a welcoming and engaging Friday night service with musical instruments at least monthly, possibly with Shabbat dinners available.

Work with committees and affinity groups to encourage other Jewish families to host members in their neighborhoods (See Rivers Project – Temple Israel – Boston). One of these groups might be a “keeping Kosher” support group or dinner club. OZ will offer Shabbat dinners that will be characterized by engaging ritual and a lively, warm atmosphere. OZ will provide “lunch after services.” OZ will explore early morning study or yoga before services.

3. Critical Issue: Social Center

OZ will become a more central Jewish social center.

Strategy

OZ congregants will view the synagogue as a place to come anytime to meet other members and friends and engage in many activities beyond strictly religious observance. OZ will foster a culture of inclusiveness, friendliness, joyfulness and a general sense of excitement to be at OZ. Children will look forward to coming to OZ to socialize with their Jewish friends from Hebrew School. As Rabbi Hayim Herring has written, today’s Jews expect to find all kinds of opportunities for engagement (anything, anytime, anyplace). OZ must look for new approaches, new times and new venues.

Recommendations

- Create small groups (affinity or otherwise) that link members together, so that any member will feel like they have the opportunity to have an OZ “crew” that knows and likes them. (Rather than feeling like an anonymous person showing up at events and services full of near-strangers.) Have several small thriving havurot (5-6 families each) that meet monthly at rotating homes (*see Rivers Project*), with all the smaller groups coming together for a larger gathering every few months.

- Develop a membership profile system to better understand members' skills and interests.
- Train group leaders on how to make groups creative and effective. Use team building exercises at OZ events (structured & led activities that help bridge strangers).
- Explore new ways to celebrate members' lifecycle events (retirement, getting a driver's license, etc.)
 - Create an active 20s and 30s group that connects through various social outings (example: bar night, movies, trip to Montreal, boating on Lake Champlain, Torah on Tap). Welcome all 20-30 Jews of Burlington community.
 - Start an annual calendar of events at OZ that bring congregants together, such as Adults Night Out and OZ Applauds. OZ will offer regular (monthly? 2x/month?) service opportunities that are also social & fun. (Cooking together, doing green-up together, gleaning in the Intervale together, etc.) The Membership Committee (with support of the executive director and educator will recruit a designated leader for each group.
 - These recommendations underscore the need for a dedicated executive director and program director (See Professional Staff Model).

Strategy

Build on OZ strengths and energy around holiday celebration. Get more people involved:

Recommendations

The Membership Committee with support of the professional staff and clergy will work with the Hebrew School, Adult Education and Religious Committees to develop a holiday celebration planning calendar. The following are some potential ideas.

- Have opportunities before each major holiday for people to come together to discuss, learn, plan and feel supported around a spectrum of ways to observe that holiday. Host a thriving, heavily participatory support/discussion group for Jewish parents/families, following a variety of themes.
- An adult-oriented Chanukah celebration/party.
- An adult's only Purim masquerade ball —with cash bar and prizes for best costume.
- Adult friendly and family celebration of Tu B'Shvat in an environmental way: maybe an xc ski in the woods, a community dinner with the seder, and/or some type of environmental clean up or activism.
- A strong tradition of Purim Shpiels by kids and /or teens and/or adults, performed for the community at one of our several Purim events. This could be worked on in Hebrew school and/or Young Judea.

Strategy

Engage parents and students more in the work of social action groups.

Recommendations

- Create significant community service requirements for bar mitzvah kids. This could be service-oriented (COTS, etc.) or activism-oriented, depending on the bar/bat mitzvah kid's preference. Ensure significant non-parental adult help in coordinating, perhaps from the social action committee or the Mitzvah Mounties (whatever we're called.) Host a thriving, heavily participatory support/discussion group for Jewish parents/families, following a variety of themes.

Strategy

Provide a realistic plan to grow membership.

Recommendations

If we can execute the membership strategy we will be able to forecast **10 net new** membership units for 2010-11, 2011-12, and 2012-13.

II. Social Action

Social Action Task Force Goal: We seek to elevate the place of social justice on our synagogue communal agenda.

Vision

We seek to understand the dimensions of justice as a commandment to recognize that every human being is created in the image of God.

We recognize our obligation to address tikkun olam to repair and heal the world.

We recognize the essential power of reciprocal action and support, where the obligation to act empowers givers to be recipients and recipients to become givers.

We recognize the need to achieve this both as an individual and at a community level.

1. Critical Issues: Thrift Shop

Honor the legacy of the "Shalom Shuk" (formerly Sisterhood Thrift Shop) and Resettlement Mission

Strategy

Engage members in “hands on social action.” With the strong presence of the Vermont Refugee Resettlement Program at OZ, the traditional “Barn” thrift shop has increasingly provided a social justice opportunity for OZ members to do what Rabbi Lawrence Kushner calls “primary acts” — to be “hands on” in providing clothing to community members in need. New guidelines, developed in collaboration with the VRRP, coupled with the dedicated efforts of a small and loyal group of volunteers, continue to bolster the functionality of the shop as a vibrant center of reciprocal action and support and as a “meeting place of peace.”

Recommendations

- The social action committee will hold a community celebration bringing together OZ and VRRP members, to officially “rename” and repurpose the store as well as to honor its past.

The social action committee and the thrift shop volunteers will develop a brochure describing the “Shuk,” its purpose, new guidelines and operating times, together with information for congregants and others to volunteer and support the ongoing operation of the “Shuk.”

- They will publicize the celebration, put the story on the web, and make a banner for the barn.

2. Critical Issues: Social Justice Calendar

Create a calendar and communications plan for social action/social justice events to engage all ages

We believe that the world is built on three things (al shlosa dvarim) — Torah, Worship and Deeds. At OZ we strive to weave all three into the life of our members. We look over the Jewish year to find ways to connect social justice to our community through prayers, services and rituals. We strive to make tzedakah a part of the life of the congregation through ongoing programs like the thrift shop and partnership like VIA that take us beyond the walls of the synagogue. We look for ways to connect the generations to social actions concerns by addressing the needs of all ages from children in need to the real concerns of seniors.

Leaders often speak about the central role that social justice plays at OZ. Members were very appreciative about social justice programs at OZ. The web page notes that Ohavi Zedek means “Lover of Justice.” In Tikvah 2020 meetings a central theme was Rabbi Chasan’s commitment to social action.

Strategy

Develop a Year-long project, entitled “Tzedek and Tzedakah” (Justice and Righteousness), together with a year-long calendar of events, to educate, engage, and organize the OZ community.

Recommendations

- Organize events that include (in addition to the “shuk” event): (1) the placement of a new “Tzedakah Box” with accompanying materials to highlight Jewish teachings on the obligation for and variety of ways through which we actively pursue justice and righteousness. A brochure will always be available next to the box highlighting the social justice opportunities that exist this year.
- Organize a fall “Healthcare conference” to explore what Vermont can do to make healthcare available to all its citizens in a way that is equitable, affordable, and sustainable.
- Connect with the Hebrew School faculty and staff to coordinate activities and calendars
- Work with the Rabbi Steinberg and Rabbi Chasan to involve Hebrew school students in working to support the “shuk,” participating in the “Tzedakah” project, and engaging in larger conversations about senior’s services, health care and other activities. Show them what their clergy and adult leaders are working on. Bring these stories into the classroom to create intergenerational learning opportunities.

3. Critical Issues: VIA

Cultivate Interfaith Relationships. Support the Vermont Interfaith Alliance and Other Community Partnerships

OZ was a founding member of VIA and supports its vision for interfaith action as a means of facilitating deeper relationships between OZ and non-Jewish communities and as a collective force for achieving positive community change. That commitment has been bolstered of late with Rabbi Chasan’s presence on VIA’s board. His tremendous energy and vision have been instrumental in expanding the group’s awareness of important opportunities to call attention to such current concerns as healthcare and tax reform. He has joined with other VIA ministers and congregations in testifying on the importance of their faith commitment to pursuing justice.

Strategies

Continue to provide leadership in Vermont Interfaith Alliance (VIA)

Recommendation

Continue to operate as OZ's "Local Organizing Committee" in providing support for ongoing VIA activities and in soliciting VIA support for OZ social action issues.

Strategy

Help the Facilities Task Force explore the needs of seniors

We intend to work with, and for, elders and others in our community in need, in systemically identifying and addressing those needs in ways that dignify and empower. The social action committee needs to help the "facilities" task force focus attention on elders housing issues, both in regard to providing detailed research and information on past efforts and in considering possible short-term opportunities that may address current needs for elders housing while exploring longer term options (construction) to address the congregation's future needs.

Recommendations

Work with the "Campus/Facilities" task force in sharing research on senior's needs and in identifying opportunities to support Jewish "elders housing" at OZ.

Recommendations

The "Empowering Our Elders" task force will be reconvened for purposes of recommending actions and educational events/programming (in conjunction with the "Tzedek and Tzedakah" project) for addressing more immediate and short-term opportunities to bolster our congregational commitment to our elders.

4. Critical Issue: Funding

Funding Social Action at OZ

An ongoing challenge for the Interfaith/Social Action committee in developing programs and in supporting "social action" initiatives has traditionally involved the absence of any dedicated funding. We propose to create a designated "social action" fund and to encourage congregants to support efforts to facilitate "action" both within our congregation and the larger community.

Strategy

Create a dedicated fund for Social Action Committee efforts focused on Supporting and Sustaining Just and Righteous “Actions.”

Recommendations

- The Ellie Potash Fund will be renamed the “Ellie Potash Social Action Fund,” and members of the family, together with the Rabbi, and the Executive Director will work out the details for designating how and where the fund will be used.
- A celebratory “announcement” of the fund and accompanying event will be organized to make congregants aware of its purpose.

III. Finance and Fundraising

Finance and Fundraising received more votes in the priority setting workshop than any other category. OZ leaders feel that finance is very important but that it has not been historically very urgent. There is now a heightened concern about finance due to the following:

- There was an **operating deficit** for fiscal 2008-09 of about \$68.5K.
- This required that some **special funds** that would normally go into an endowment to be used for operating expenses (not ideal). (Note: the board subsequently voted not to use endowment funds for this purpose.)
- There is a **small endowment**. There was a lack of energy to launch a new capital campaign to address unmet needs (school rooms, kitchen) when Tikvah 2020 began.
- Tikvah 2020 has identified a variety of needs that leaders would like to address. There is some concern about the financial resources to achieve these plans.

While fundraising issues are perceived as important now, they have not seemed to have been urgent in prior years. The congregation has been close to break even over the past 5 years. Fundraising was not a top priority. While designated gifts are perceived as a critical issue, there has not been a “case” made for giving or a group of solicitors trained to make the case. The board does not necessarily have those skill sets on its current team.

The leadership has often been pulled in different directions. While concerned about the deficit, leaders have suggested that OZ become friendlier by eliminating High Holiday seat charges. HH seats, however, are the number one source of fundraising (\$40,000).

OZ has a dues system where members pay what they are “comfortable with.” Currently between 40 and 60% of the members do not pay standard dues. A rabbi once explained her spiritual leadership as a process of afflicting the comfortable and comforting the

afflicted. We believe that dues need to be managed with sensitivity, care and dignity—but financial sustainability and member accountability are not always “comfortable topics.”

1. Critical Issue: Financial Resource Development

Financial Resource Development—from Avoidance to Engagement

Recommendations

1. Launch a **values-driven campaign** to get to know more of OZ’s members over the next 12-18 months.

“One on one” meetings will be set up with the rabbi and other committee leaders. They will use the OZ profile to get to know members better. They will identify the needs and wants of members. They will also communicate the financial and volunteer service needs of OZ. OZ will remain “open to all,” and no financial records will be requested. OZ leaders will strive to proactively engage the membership about financial sustainability.

2. Monitor how many members have been engaged.

The committee will communicate their commitment to financial sustainability by reporting out to the community their progress on dues, fundraising, and designated giving. This will increase the confidence and commitment of donors.

3. Move our annual campaign to the High Holiday period like most congregations.

Congregations use the HH time frame to “make their case” for financial needs of the synagogue because they know that they have many peripheral members who only attend at High Holiday. High Holidays are often described as the most valued part of synagogue membership. Members come out of the summer months and look to the High Holidays and the central role of the synagogue. It is a great time for them to reflect on their commitment to tzedekah (social justice) and avodah (support of the synagogue).

Some congregations feel that High Holiday appeals take away from the dignity of the service. The rabbi need not speak of the campaign during the holidays. He can focus on spiritual issues. It is quite traditional for the president to thank members for their support and invite them to respond to the campaign for funds and for engagement. Requesting members to connect to the OZ “Wants to Know You” campaign is values-based leadership at its best.

4. Major gift solicitors will organize the “**Tikvah 2020 Wish List**” and look for donors that might be excited about supporting an initiative. This could include key projects left over from the last capital campaign (classrooms, kitchen etc.)
5. Review Membership Dues, levels and payments, doing a complete overhaul based on what we need to bring in and less on voluntary payments. Look to include one payment and ease Hebrew School parents heavy financial load.

IV. Facility and Campus

We explored many visions of what to do with Fern Hill and the land behind the synagogue. Some have wanted to put up a Jewish community center facility. Some suggested OZ consider remodeling this low income housing at Fern Hill for Jewish assisted living. Others have wanted to explore a shared campus with Temple Sinai. Some contemplated the launch of an early childhood program.

These are all creative ideas, but they are not well aligned with the current OZ resources and capacities. OZ has a deficit and has not yet developed a sustainable financial resource development plan (See Section III above-Financial Resource Development-dues, fundraising, endowment etc.). OZ has not fully defined its professional staff team. It has not built a board with adequate strategic, financial and fundraising skills. OZ leadership is not well positioned to go into the property management business. It has not documented that there is demand for JCC like facilities (gym, pool, early childhood, camp etc.)

1. Critical Issue: Jewish Community Center (JCC)

JCC and Social Programs

Recommendation

1. Focus on “JCC without walls” programming to enrich social component of OZ.

The idea of developing a JCC building seems expensive and high risk. JCC’s are draining the limited resources even from larger intermediate Jewish cities. It is very unlikely that Burlington could support a JCC. We believe that the concept of a “JCC without walls” is has real potential. One can have sports leagues using other facilities in the area.

Recommendations

Ensure a commitment to develop the professional staff and volunteer leadership to create more programs that reach out to be people “anyway, anytime, and anywhere.”

JCC-without-walls programs (sports leagues, fun runs for charities, bike trips, hiking, picnics, swim days, etc.)

2. Critical Issues: Mergers and Partnerships

Put Merger exploration with Sinai in long term category

It is hard to predict when or if synagogues will seek to merge. Most congregations hold on to their identities as long as possible. Most mergers involve congregations that have faced major demographic decline and now find themselves in a facility they simply cannot manage alone. The most common mergers are smaller congregations that lack the critical mass to retain a rabbi, an office manager or an educator. Out of desperation they try to pool their resources.

Mergers are often more successful when both rabbis are close to retirement. At such times a new rabbi can come to lead the “new congregation” to a fresh shared vision. OZ and Sinai would be a merger of two congregations of decent size, with different denominational backgrounds. We do not feel there is currently urgency for this work. This could change, but it will not likely be a priority in next 3 years. Mergers perform best when both parties feel like they are building something new together. This minimizes some of the memories of past conflicts and unhelpful attitudes about the other. The Tikvah 2020 plan does help articulate OZ’s aspirations. Temple Sinai leaders could be invited to review this plan with OZ leaders to see how they might like to collaborate in the short term or longer term.

An alternative to the merger is simply a **shared campus**. Both congregations keep their clergy and denomination but they share administrative and (usually) school functions. There are some savings through shared administrative functions but these are often not huge. Shared campus plans do encourage a unified dues plan and thus tend to create more compliance with standard dues. One major benefit of mergers is that there is more permeability between the congregations. They can collaborate on key programs and holiday celebrations. They can provide a critical mass for Torah study or worship (one minyan etc.)

Recommendations

Do research on commercial real estate value of developing the land behind OZ. Over next three years maintain an open line of communication with Sinai. If there is real interest, OZ may want to delay developing the property. This will keep the option of a merger or a shared campus open for a while. If there is no interest, we recommend that the property be developed and the proceeds should go into the OZ endowment. The strengthening of the endowment is a critical need.

3. Critical Issue: Fern Hill

Future for Fern Hill

Fern Hill was designed to be low income housing. It fulfills a social need. OZ was active in putting investors together to build the facility and to secure federal housing status. In 2020 OZ will be the new landlord. It currently produces about \$80,000 (verify) in rent as a business. The facility is not designed for more upscale assisted living (the trend). In order to change its mission it would require that OZ be willing to alter the relationships with Fern Hill tenants and invest and develop the property for a new use. Given OZ sensitivities to issues of social justice, it might find it difficult to change Fern Hill's mission. It might also find it difficult to implement plans to raise the operation's profitability (notwithstanding OZ's real financial needs). It is possible that part of the building might be used for classrooms or other synagogue needs (i.e. multi-use).

Recommendations

Assume for planning purposes that Fern Hill revenue will continue "as is." This is a conservative estimate. Under this scenario OZ can plan to receive an inflow to operations of \$80,000 per year* in 2020.

Critical Issue: Unfinished Business from the Capital Campaign

There were several key items that had been part of the capital campaign plan that were unable to be addressed due to lack of funds. There was a great deal of desire to see the kitchen remodeled. There was also interest in building additional classrooms. The kitchen renovation project addresses OZ's desire to become more of a social hub for members around holidays, Shabbat and simchas. The kitchen will increase the efficiency, effectiveness and satisfaction of dedicated kitchen volunteers.

The Hebrew school classrooms were perceived as a high priority. They address immediate issues. Currently the Hebrew school needs to use the social hall, and the rooms upstairs are only separated by a curtain. OZ seeks to reach out to young families. Upgrading the school facilities demonstrates a commitment to lifelong learning.

V. Goal: Promote Life Long Learning

Background

OZ does not have a particularly strong worship core group. Research has shown that members can grow in spirituality and commitment from the education pathway. Young families will enter OZ for the sake of their children's education. OZ has a window of opportunity to engage them through their bar mitzvah preparation years.

1. Critical Issue: Young Families

Engage young families

Strategy

It is critical that OZ develop a relationship with the adults while their children are in the Hebrew school. Family education projects that engage both a parent and child are a critical strategy.

Recommendations

Implement the "OZ Want to Know You" campaign with families of school age children. OZ will track the number of parents who participate. OZ will have all participants fill out the OZ membership profile. OZ will set up 1-1 meeting with a religious school community outreach person.

Consider securing a family education resource as a teleconference coach. (See Grinspoon Award winners).

2. Critical Issue: Adult Education

Have the Adult Education Committee Build an Education Calendar

Strategy

OZ needs an active Adult Education Committee designed to create an understanding of the scope of Adult Education at OZ and to create an active program. Many members of the synagogue are well qualified to offer courses on a range of subjects both directly related to Judaism and more general. The Adult Education Committee needs not only to create these programs but also to solicit participation not only from people in the congregation but also from the broader community.

This effort requires support from Board members through their own active participation in courses and also through their spreading the word that *Talmud Torah*, traditional Jewish life-

long learning is central to the mission of this synagogue. For the long-term, the Board has to develop financial resources to support this effort so we are able to develop and implement programs with outside scholars and educators. In addition to the Feen Endowment, we need additional substantial financial commitments to quality programming.

Recommendations

Have the adult education committee and staffs keep the board up to date about program offerings and attendance. Get a commitment from all board members to attend some events on the calendar (a board expectation)

3. Critical Issue: Classroom Space

Make Classroom Space a top priority in next capital campaign

Leaders clearly point to a shortage of space for religious school programs. Classes have to meet in the social hall. Others classes share space with a modest divider wall. The renovation to add classrooms seems a strategic investment (See Campus/Facilities).

Recommendations

OZ needs to stage classroom renovation along with other priority issues like the kitchen in the next capital campaign. The cost of renovating the classroom should be defined so it can be part of the Tikvah 2020 "Wish list."

4. Critical Issue: Early Childhood Program

Continue to explore early childhood programs.

Strategy

Planners expressed some interest in an early childhood program. Early childhood programs can be profitable because parents must have day care where as they can defer a synagogue membership. Early childhood programs also can provide a possible stream of prospective young family members. In smaller Jewish communities, many of the programs have a substantial percentage of non-Jews. The percentage that actually chooses to join may be a minority of those families enrolled. A competitive review of the marketplace would be necessary. Usually programs have start up costs. Synagogues have to be prepared to lose money for some time. Is OZ ready to manage these deficits for a period of years?

This would be a new task force. It would need a staff leader. The ECC director usually reports to the executive director. ECC has many logistical, HR, security and facility

issues that require administrative management. It will be important to have solidified the executive director role before you do this study.

5. Critical Issue: Youth

Strategy

Continue to strengthen and grow youth activities and integrate them with the Hebrew School, Adult Education opportunities, the OZ community, Temple Sinai and greater Jewish community

Recommendations

The success of the youth program is contingent upon having a staff person with 10-20 hours/week dedicated to the youth group. The current sense of priority given to this program should be continued. Particularly vital is a strong program for post Bar/Bat Mitzvah students in order to strengthen their Jewish identity during this critical developmental stage of life.

- Youth Group – A mainstay of the youth program – should include social, educational, religious, community service and cultural activities. Continue our affiliation with a pluralistic movement, which enables children from Temple Sinai, other Vermont synagogues, and unaffiliated families to participate. Our current affiliation with Young Judea was chosen for its pillars of pluralism, Jewish identity, social action, and Zionism and peer leadership.

Recommendations

- Summer camp and Israel experiences must be a key part of OZ's youth program. These programs have been shown to greatly enhance Jewish knowledge, identity and commitment of young people to Judaism. **Scholarship funds** to help members to attend these programs are a priority.

Recommendations

- Improve participation of Ohavi Zedek high school students in the Chai School – a strong asset to our Jewish community.
- Create new programs such as one or more parent/child Jewish book groups; a Rosh Chodesh group for girls; a youth tzedakah group with a focus of helping needy members of the OZ community – perhaps by cooking meals, visiting the homebound, raising money for specific needs; a teen chorus, band, and/or drama group (perhaps jointly with other area synagogues).

VI. Goal: Strengthen Leadership

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Vision

We seek vibrant, passionate, connected, inspiring, accessible and synergistic leadership that will result in achieving OZ's overall short- long-term goals.

We seek to create the most effective staff structure relative to our congregational size and to ensure that our staff members have unique abilities to inspire, motivate, educate and engage our membership at the highest levels.

We seek to create a highly engaged and transformative board team that not only works well together on synagogue business, but also learns and plays together, building a strong OZ community. Board members should be committed to develop effective meetings, engage and empower committees, and develop a leadership process, which ensures board orientation and a strong institutional memory of board best practices.

We seek to create a robust flow of volunteer leaders who feel moved and inspired to serve as board and committee members and in other leadership roles whether or not directly asked to serve.

1.Critical Issue: Professional Staff

Strengthen Professional Staff

Determine key staff roles and structure a model to include those roles; clergy succession planning; fill staff positions with well-trained and trainable individuals; build strong leadership connection between clergy and board.

Strategies

Research other synagogue staffing models; create a rabbinic succession plan; create an executive committee/group of the board to partner with the clergy and executive director; provide leadership development for staff.

Tikvah 2020 emphasized the need for volunteer and program development. Most members will engage OZ from other pathways besides weekly worship. Strong and outgoing leadership is needed among the clergy and professional staff at OZ to help design, plan and recruit for key social and educational events.

It is clear that OZ does not have the number of skilled daveners and Torah readers to ensure that the Rabbi Chasan can meet the worship commitment of the congregation.

At this time OZ needs to continue to have a cantorial position to meet the many worship needs of its members.

Recommendations

Develop a staffing plan to compliment Rabbi Chasan over the next 5 years of his contract (to 2014). Ensure an executive- director- administrator role to provide financial, management and volunteer development. Ensure the role of community educator to manage the religious school, membership outreach and holiday celebrations. The community educator should have community building skills. Rabbi Chasan has disclosed that he would like an additional 2 years at the end of this contract. The process of defining a working staff model and an effective lay leadership process will be critical to the next stage of his rabbinate and the future success of OZ.

Board action taken: The board has voted to maintain a cantor and an educator on staff.

Develop a professional staff performance review- The process will review both attention to tasks (what they do) and core competencies (how they do the work). The performance review process will ensure Tikvah 2002 goals are part of the process. It will combine review of professional staff with board self assessment so that the review cycle is a mutual one (see USCJ_RA Joint Document). Mutual review helps reduce the tendency to only hold professional staff accountable for congregational success. Refining this process will help leaders evaluate current staff and lay the foundation for how future staff are recruited and evaluated.

Performance reviews should be done informally throughout they year (at least quarterly) and formally at the need of the year. Performance review and contract negotiation should be separated. Performance review should be completed at least 4 months before any contract negotiations.

The performance review team should include the President, the past President, 2 board members and 2 members form the community with a strong understanding of the holistic OZ community. The board would retain its right to approve any major contract renewal.

2. Critical Issue: Transition

Manage clergy transition

The transition literature suggests that it is critical for lay leaders have a clear sense of their vision and their goals before they welcome a new rabbi. Tikvah 2020 was designed to clarify the congregation's situation, its vision, the strategies and the goals for future. Leaders should be able to reference Tikvah 2020 to provide a sense of direction for prospective lay leaders, professional staff or a new rabbi

The next 4-6 years will be critical for both the lay leadership and the staff. This is a chance to build confidence, energy and excitement among the community. This will lay a strong foundation to allow Rabbi Chasan to retire and to welcome a new rabbi.

Work with Rabbi Chasan on the timing of this transition. He has made it clear that it would be his preference to stay for another 2 year term.

Plan celebration of Rabbi Chasan's rabbinate (in last year)

Provide a transition plan for the new rabbi. Set up introductory meetings with the community etc.

3. Critical Issue: Effective Board

The congregation must determine the most effective board size and structure; fill board with passionate members; build the farm team; use assessment tool with board to develop leadership goals.

Strategies

Provide potential and current lay leaders with formal leadership development training; use of effective nominating committee; hold annual board orientation w/ expectations; test board members through prior committee service; use of annual calendar to maintain sharp focus. Provide necessary By-laws amendments to ensure these changes.

Recommendations

1. Create a Governance Team. The Steering Committee and the board should recommend 4 leaders (2 board members and 2 non board members) to help the executive committee plan the board yearly agenda. This is an ad hoc committee designated by the president.

Ensure the board implements the Tikvah 2020 goals and action items.

Ensure the board has a written timed agenda that focuses on major strategic issues

Provide a process check to see assess board member satisfaction with meetings

Utilize a board improvement self assessment tool (Alban) with the new board starting in December of 2009 and at the end of 2010. Have the Governance Team track progress on key best practices.

2. Create a charter for a nominating committee. The nominating committee chair would be appointed by the president. Preference would be given to an immediate past president or another past president. The committee would be made up of 2 past presidents, 2 past board members and 3 members of the community. (This is a bylaw change)

The committee would interview all current board members to determine if they wanted to continue. They would review their attendance records and review their performance with the executive committee. They would also recruit new members. They would seek input from the president and the clergy. All returning and prospective members would review the board expectations document to ensure they understood current board expectations. Term limits would be established (three 2 year terms) before leaders must (at least temporarily) cycle off. The exception would be those who went on to become officers. (bylaw change)

The President would make recommendations to the nominating committee on officers that would make up their executive committee. The nominating committee would retain the ultimate right to make up the slate. The board will have the responsibility to approve this slate, make any other suggestions and forward it for congregational approval at the annual meeting.

3. Provide an Orientation and Training Process- All new members should meet with the president and the executive director to review key congregational data (Briefing Book). They will review the Tikvah 2020 plan and the current board goals. They will participate in a board retreat in the first quarter of the year.

A discussion should take place on the necessity to expand the Board from 13 to 18 (chai) to allow the leadership to recruit new members with finance, marketing and fundraising experience. The typical synagogue board is about 25. This typically included committee chairs, past presidents, president of sisterhood and brotherhood. There are people who are happy to work on a project but don't want to be on the board. They need not be. There are other people who have significant governance and planning skills. They may not want to volunteer to prepare for a holiday. A board of 18 should be able to welcome both representative stakeholder members and strategic member as long as both groups are willing to embrace a more strategic board process. By raising the size of the board to 18, it will help OZ ensure a larger critical mass of key volunteer leaders. The number one strategy in synagogue volunteerism is finding ways to match volunteers with a full range of opportunities. This includes one time projects, short

terms strategic work groups, and work teams. The board needs to use the Tikvah 2020 plan as a road map and use its board members to help recruit people to drive the plan. The board will have to recommend the necessary by laws changes.

Determine appropriate committee and support structure to oversee and implement strategic plan. Right now, recommended committee and sub-committee structure doesn't exist. In reviewing the overall board structure, the board will need to codify new structures, groups and committees and then assign parts of the strategic plan to these new groups.

4. Critical Issue: Volunteer Development

Volunteer Leadership should provide a continuous flow of new volunteer leaders for the board and committees; maximize breadth and depth of volunteer base.

Strategies

Use a volunteer pyramid with multiple levels of engagement, from board to a one-time task help; development of recruitment techniques; use of profiles to pair volunteer needs with member passions; incorporate recognition.

Recommendations

1. Develop an OZ membership/ volunteer profile:
 - Use OZ events to encourage members to fill out the profile.
 - Explore incentives. Provide a free Shabbat dinner voucher at a community dinner for those that fill out and meet with volunteer coordinator.
 - Encourage that all new members will fill it out and meet with Rabbi Chasan as part of the new member process (see Membership and Outreach).
2. Track the number volunteers on committees and work teams
 - Create excel spreadsheet for tracking.
 - Set goals for greater engagement.
 - Make volunteer appeal and financial appeal as part of High Holiday appeal process (see Fundraising Goal).
3. Create major volunteer recognition event:
 - Bring in a major speaker.
 - Select a mitzvah hero to honor.

VII Goal: Joyful Worship

Vision

The **spiritual** life of Ohavi Zedek Synagogue grows out of a three-fold commitment:

- To welcome and affirm the presence of every Jew in our community.
- To uphold and teach the religious traditions of Judaism.
- To inspire and encourage each member of our community on his or her own Jewish way as together we learn to explore who we are as Jews in relationship with each other, the larger community and God.

Our vision is that the congregation be engaged and active in a study and practice of Torah that is both meaningful for and understood by each person. Whether we are weaving the fabric of our congregation out of the thread of Tzedakah, Shabbat, or life-cycle events, our strength is in our personal engagement in the creation of Jewish community.

- Joyful prayer and worship that includes music, singing, dancing, art
- Multiple forms of spiritual expression
- Liturgy that accepts and encourages members of all religious backgrounds
- Increased participation in Shabbat services
- Daily minyan
- Singing: mix of traditional and new melodies, members know tunes and sing loudly

1. Critical Issue: Joyful Participative Worship

Create joyful worship experiences that meet the diverse needs of our community.

Friday night Shabbat services:

Strategy

Folk Services include more song and are family-friendly.

- **Recommendation:** The Worship Workgroup proposed to the Religious Committee, which approved, regularly scheduling Folk Services the first Friday of the month. This schedule will be widely publicized, including particular attention in the September *Voice*.
- **Recommendation:** Provide variety of religious services (traditional, alternative, and age-appropriate).

Strategy

Incorporate Friday night worship with natural world.

- **Recommendation:** Religious Committee has approved Worship Workgroup suggestion to hold Friday night service outdoors sometime in the fall. Workgroup should explore possible locations and will schedule the service.

Shabbat morning services

Strategies

- Educate congregation to more actively participate in singing Shabbat tunes.
- **Recommendation:** Worship Workgroup suggested developing an audio CD. The Religious Committee noted that Rabbi Steinberg already has recorded a good deal of Shabbat tunes and made them available on our website. Rabbi Steinberg and Leon Urbaitel made the music easily accessible to any website visitor. Include broader publicity of this valuable resource to encourage more participation in singing.

Strategies

- Experiment with one Shabbat morning service incorporating innovative approaches and ideas.
- **Recommendation:** Working in collaboration, the Religious Committee and Worship Workgroup should plan the service. It will be held on October 31, with the Torah portion Lech-lecha, and called ***Shabbat in the Round***, featuring seating in a circle. The service will be held in the social hall to accommodate seating in the round and will include the following elements:
 - Child friendly niggunim and welcoming atmosphere
 - Shortened service (10:00 am to 11:30 pm)
 - Instruments accompanying some singing (including some rounds)
 - Introduction of prayer and commentary by Marcia Falk
 - Traditional Torah service will also include group aliyot along themes suggested by portions

Next steps should include: (1) publicizing the service (a poster is in development, RC/WW members will contact congregants by phone to invite participation in the service, etc.); and, (2) developing a strategy to gather feedback from congregants after the service (e.g., Survey Monkey for an on-line survey). Feedback on *Shabbat in the Round* will provide direction for future efforts at creating joyful worship.

Champion: Rabbis, Worship Task force and Worship committee **When:** October 31

Strategy

- Gather ideas and innovations from other congregations.
- **Recommendation:** Worship Workgroup members should follow up on leads provided by Bob Leventhal, as well as other resources, to explore other congregations' approaches. Reports will be discussed at a joint meeting of the Religious Committee and Workgroup.

2.Critical Issues: Increase Congregant Ownership of Worship Innovations

Strategy

Worship Workgroup should develop an inclusive process so that all congregants feel they've had a chance to express ideas and concerns.

Recommendation: Develop process for congregant participation in conversation about worship, research innovations and ideas from other synagogues. Publicize services and conduct and gather feedback on *Shabbat in the Round*.

3.Critical Issue: Raise level of Hebrew literacy within the congregation

Strategy

Educate members on ways in which Shabbat can be explored at home and synagogue. Build cadre of Torah and Haftorah readers. Encourage greater participation of youth in Shabbat services. Encourage more Torah study on Shabbat.

Recommendation: Recruit members to adult study to increase their skills and help them lead and (or) participate in services. Provide ongoing evaluation of chumash and siddur.

4. Critical Issue: Explore Worship Space

Explore changes in space and venue

Recommendations: Review use of current space. Explore moving bimah to center of sanctuary. Develop a calendar of worship services in different space (in the round), locations (under stars) and times.