

REPORT OF THE  
LONG RANGE PLANNING COMMITTEE  
OF  
OHAVI ZEDEK SYNAGOGUE

December 1995

## Summary

The need to undertake a long range view of Ohavi Zedek Synagogue; that is, who we are, what we are, and what do we want to be, led to the formation of the Long Range Planning Committee by Rabbi Chasan and Joan Donath.

The committee, represented by a diverse group of members, set out on a long arduous path over the past year and a half. Many hours were spent defining the vision statement: To be a vibrant Jewish community in Vermont, embracing our traditions while actively participating in our changing Jewish world. It was followed by a mission statement and seven goals to accomplish our mission. These goals deal with all aspects of our synagogue and to the extent possible were studied thoroughly by the committee. A large cross section of members as well as an open congregation forum provided most of the information on which to base our study.

In a broad sense the report deals with our membership, our institution, and spirituality. We recognized our roots in the community, our strong tradition, and our commitment to Conservative Judaism. We also recognized that to remain vibrant as the community changes around us, we must be leaders in influencing change. This report recommends many changes that we believe are essential to adopt if we are to remain vital and forward looking.

This includes major changes to our governance process, committee structure, and basic relationships both inside and outside the Jewish community, with the intent of enhancing our basic commitment to Judaism.

We believe the report should be read in its entirety and trust that the Board of Governors and ultimately the congregation will adopt its recommendations.

## Introduction

It was the Spring of 1994 that Rabbi Chasan and Joan Donath, President of the Congregation, formed a long range planning committee. Its charge in the broadest sense was to prepare a "Long Range Plan for Ohavi Zedek." The notion of such a committee and activity was not new. In fact there were several attempts in the past that never materialized.


The fact that this committee completed its work is a tribute to the committee members who recognized the significance of their efforts. The committee spent many hours in meetings and gave up some beautiful weekends to devote to working on this mission.

We received wonderful support from all the people we asked to present to the committee. It was evident they spent considerable time preparing their reports and were very open and informative in their presentations.

A major concern of the committee was that the report, once presented, would be set aside and not acted upon in part or in whole. Therefore, we solicit the board and the congregation to give this report serious consideration.

Finally, as with all reports of this nature, it really is not a "Final Report" but a first step. It should be used as a building block for subsequent studies and action, the goal always being to continue to enhance the quality and excellence we have come to expect from our synagogue.

Respectfully Submitted



Michael Schwartz  
Chairperson  
Long Range Planning Committee

## Process

The selection of the committee members was a critical task. Ohavi Zedek Synagogue and the community it serves is quite diverse. In fact the impetus for this committee, in addition to understanding and dealing with the financial and capital improvements needed for the synagogue was the recognition that the congregation's membership is changing and we should try to understand the synagogue's role in this environment.

The relative homogeneity of members that existed 20-25 years ago is being replaced, augmented by a much more heterogeneous mixture. While a majority of the members may be from a traditional Conservative Jewish background we have a sizeable number, and growing membership of members with different backgrounds - socially, religiously, economically. Clearly the members that were here in the 1950's as our current building and institution were being formed and provided the leadership for our growth are becoming smaller in number.

This diversity in membership presents a formidable challenge to integrate into our congregation. However, this integration could also provide a richness and source of strength as we move into the 21st century.

The goal in forming this committee was to have it represent, to the extent practical, a cross section of our congregation. The members were generally active in various committees or brought with them a distinct point of view. The list of members is shown in Table I.

The approach we took was to first define a vision statement, a mission statement and finally the goals to achieve the mission. These are shown in Table II.

The committee agreed that these statements were the foundation around which the plan was to be constructed. We further agreed that the history of Ohavi Zedek, in fact that of the Conservative Movement, was the recognition that a changing Jewish world was a fact and that we needed to be part of it.

The next step was information gathering. We invited over 22 speakers, representing all aspects of our synagogue, to address the group and present their charter and discuss their role from a long range perspective. (see Table III) In addition an open congregation forum was held to solicit input from the membership at large. Also, members of the committee were available to any congregant who wanted to discuss any issue at hand.

What we learned will be summarized later. What became obvious was the realization that the members serving on the various committees took their responsibility seriously and served with distinction.

In order to expedite the process we then broke up into three subgroups to extensively review the data. The groups were: Institution, Spirituality and Membership. Each subgroup presented their results to the full committee. The reports were discussed in detail and accepted as amended.

Finally the subgroup reports were merged together in the final report which was reviewed and accepted by the full committee.

## Report

The report is organized according to the goals that support the mission statement. It goes without saying that the goals are interconnected; therefore some repetition is inevitable. In order to avoid excessive repetition, we will assume that the reader will read the document in its entirety, rather than single out a particular goal. The goals are listed in Table II.

### **Goal #1: To increase membership across all categories**

Ohavi Zedek throughout its history has reached out primarily to the traditional Jewish community in the greater Burlington area. Now the Jewish community in Vermont is constantly changing, both geographically and, perhaps more importantly, sociologically. A diversified expansion of membership will fuel the fire of intellectual, spiritual, and fiscal growth in the congregation.

We must expand our membership across all categories. This difficult task requires the transformation of our current Membership Committee to a Membership Outreach and Development Committee. This new committee must be significantly larger and more diversified than the current committee.

The new committee should serve as an advocate for the congregation membership, and so act as a conduit from that membership to all other committees. Its task, therefore, would not be limited to the recruitment of new members, but would also include the establishment and maintenance of methods to understand the needs of our membership so that the activities, operations and rituals of the synagogue would be consistent with the spiritual, educational and cultural needs of our congregation.

In order to attract new members, a strategy needs to be developed to coordinate, promote and publicize the assets of the synagogue (e.g. school, cemetery, programs, etc.). Clearly, the specific culture of the synagogue--its particular combination of spiritual, educational, programmatic offerings, and its role in the greater community -- affects membership, and this should be emphasized. This is addressed in more detail below.

Financial considerations with regard to membership need to be addressed. 1) The dues structure needs to be more closely examined to insure that it does not deter new members or discourage the retention of current members. 2) The abatement process also needs to be examined and proof of need demonstrated (the same way proof of need is required for college or other scholarships). 3) Because the officers of the synagogue must be able to clearly predict revenue generated by membership dues in order to avoid budget shortfalls, a variety of strategies should be examined for ways to budget abatements more accurately. 4) Regular reevaluation of the dues structure needs to take place.

Finally, it became obvious that the present computer systems are inadequate to provide meaningful data about our membership. It is essential that the Synagogue invest in the technology necessary to track membership both to monitor current membership and to project future needs. Updated computer software will ease tracking of dues and membership.

## **Goal # 2: To become a center for Jewish culture**

In order to remain a vibrant force in Vermont's Jewish community, Ohavi Zedek must become an open door for the expression of Jewish culture and spirituality. The committee recognizes that Ohavi Zedek's members and the members of the unaffiliated Jewish community relate to Judaism in a variety of ways. We speak a variety of Jewish "languages," ranging from traditional religious understandings to cultural understandings. In addition to a strong educational outreach (described under Goal #3), we need to develop programs that deepen the Jewish identity and commitment of all Jews. Ours is an institution well situated to offer cultural programming that can reach secular Jews who have previously avoided synagogues while still maintaining a deep commitment to Judaism, as well as to religious Jews.

The current home of Ohavi Zedek Synagogue was originally named the Ohavi Zedek Synagogue Center, a building used for worship and other Jewish activities. As a center for Jewish culture, the Synagogue/Community Center could contain, in addition to the sanctuary space, school, pre-school, and library that already exist; a mikvah, theater/concert hall, climactically controlled storage space for historical documents, and a gym (with possibly a pool). Jewish performing arts (e.g. dance, music, theater), visual arts (e.g. painting, sculpture, traditional Jewish arts), displays (e.g. of local history and artifacts), literary events (e.g. readings, publishing parties), movies, and miscellaneous intellectual offerings (lectures, workshops with visiting scholars, oral history projects) would be actively, aggressively promoted. The synagogue center would hold "spiritual" events like Shabbatons (school-wide at the beginning of the school year, community-wide at other times) and external events originating in the center like ski trips or educational field trips. In addition, synagogue-based havurot would have permanent homes in this expanded complex. (This is further elaborated upon under Goal #6.)

Finally, the synagogue is committed to continuing to develop its leadership role in the Jewish community in Vermont. This includes encouraging and promoting joint activities with other area synagogues--e.g. community youth chorus, band, teen youth activities, Sisterhood events, and cultural programs like movies, holiday events.

## **Goal #3: To inspire Jewish learning, spirituality, and growth**

## **Goal #4: To increase commitment to the basic building blocks of Jewish life**

That these two goals are inextricably linked, each leading to the other, will be clear from the following.

### *Religious Observance/Spirituality*

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.

There is a creative tension in this three-fold commitment. Historical standards of Jewish communal life are in delicate balance with the variety of Jewish backgrounds and forms of Jewish identification of our members. This balance reflects the Jewish realities of a time of great change, when the search for spiritual roots is very personal, and yet so many Jews are on the same road together. At such a juncture we are a community very much aware of the potential of traditional Judaism to provide form and substance as we live our Jewish lives together. We are committed to Talmud Torah, lifelong learning. Therefore, it is our vision 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.

We need to continue to provide a variety of religious services. This need can be satisfied by offering regular traditional services (on weekdays, Shabbat, and holidays), alternative services (such as the folk and creative services), and additional age-appropriate services such as Tot Shabbat, mincha during Hebrew school, and Junior Congregation. One way to increase participation in these services is to raise the level of Hebrew literacy within the congregation.

Shabbat is more than one aspect of a community's life. Recognition of the centrality of Shabbat can be expanded by educating members about the many ways in which Shabbat observance can be explored at the home and at synagogue. There are a number of ways to facilitate increased devotion to Shabbat such as building a cadre of Torah readers and chanters of the Haftorah. In addition, we must encourage greater participation of the Hebrew School and youth groups in Shabbat services and explore the possibility of expanding adult study on Shabbat afternoon. The bottom line is increased commitment of the community as a whole.

The committee encourages ongoing evaluation of the appropriateness of the current chumash and the current siddur. The synagogue should consider moving the bimah to the center of the sanctuary, with the cantor facing the ark but leading services from within the congregation.

### *Hebrew School*

Ohavi Zedek's Hebrew school is one of its most important assets. Its importance is underscored by the Synagogue's policy of subsidizing the Hebrew School, which should be continued. Within the constraints of a tight budget the school has been able to offer developmentally based classes with Jewish content. Its student body is diverse and its staff has a wide range of skills and experience. The space required to house the school is under pressure to expand.

The recent renovations only begin to meet the most pressing demands for increased classroom space. The number of children attending Hebrew School increased 40% in the past five years.

Updated computer software (mentioned above Goal #1) would enable Ohavi Zedek to project student enrollment in the future and better plan for increased or diminished space needs.

The synagogue also needs to address the issue of faculty recruitment and retention in order to maintain a high quality of education which our children deserve. Among the areas which need to be addressed are improving staff salaries, providing opportunities for staff development, and networking with other educators. This would allow the faculty to enrich their Jewish education thus encouraging their continued commitment.

In addition, the committee urges support for increased family education (e.g. family workshops), more parent activities (e.g. a course on Jewish parenting), family retreats, and increased community service opportunities for students. We also recommend ongoing reexamination of the curriculum with an eye to strengthening the way we nurture a love of Jewish learning.

### *Preschool*

The Green Mountain Shalom Preschool as currently configured can only accommodate eleven students. Ohavi Zedek recognizes its potential to fulfill a great need in the community. The preschool needs a separate space, described more fully under Goal #6.

### *Youth Program*

Ohavi Zedek Synagogue needs a Youth Program which involves children of all ages through young adult. The program needs to reflect the values of Ohavi Zedek Synagogue and, at the same time, be open to include Jewish children of families who are not members of the congregation (eg. children from other Synagogues in Vermont).

The focus of O.Z.'s Youth Program needs to be multi-faceted, including social, educational, religious, and cultural activities. Toward developing such a focus, the Synagogue would benefit from a review of its affiliation with United Synagogue Youth. Such affiliation may or may not continue to make sense. In order to determine how our youth program may best grow, we need to take a look at other alternatives, such as Young Judea, a joint program with Temple Sinai, or an independent approach.

Whatever the outcome of such an assessment a key part of O.Z.'s Youth Program must be an Israel experience for as many children as possible sometime before they graduate from High School. These programs have been shown to enhance the basic understanding and deepen the commitment of young people to Judaism.

The success of the Youth Program is contingent on a strong Youth Committee. In the past the Committee has played a relatively minor role in the life of the Congregation. We need to raise the sense of priority among members of the synagogue about this program.

## *Adult Education*

In its role as a leading Jewish educational institution in Vermont, Ohavi Zedek also needs to offer more courses in adult education. There must be a substantial commitment to adult and family education so that the membership may be actively engaged in Jewish study. This includes creating a stimulating scholar-in-residence program and a year-round lecture series. Expanding adult and family education will allow increased participation in many aspects of the congregational community, including religious services. Our congregation needs to be more knowledgeable of the religious and cultural traditions of Judaism. (For more about cultural programming, see Goal #2.)

### **Goal #5: To provide leadership for and participation in gemilut hasidim in the community at large**

The committee recognizes the need for each congregation member to have a commitment to each other within the synagogue community and to those of the larger community. We support and encourage the efforts and activities of the Social Action Committee, Sisterhood, Men's Club, and others who have been addressing the internal issue of the needs within our senior community. These activities include Sunday bookreadings, drama presentations, visitation with members who are home-based and hospital based, and assistance to those who need transportation for their weekly needs. We encourage exploration of the needs of families and children within the Synagogue community. Our commitment to a strong outreach to the larger community can be a reflection of our internal cohesiveness. There is a longstanding commitment on the part of members of Ohavi Zedek to meet the needs of our neighbors, and it is essential that we build on this commitment.

### **Goal #6: To develop a blueprint for the use of our existing buildings and property in ways that meet the needs of our members and or the community at large**

In order to better facilitate and maintain an expanded membership, the physical needs of the synagogue need to be addressed and the assets evaluated. The committee considered and rejected the notion of selling the current site and rebuilding elsewhere, even though the sale of this prime real estate might be able to fund much of the long-range plan. Instead, the committee recommends that the current core of Ohavi Zedek (sanctuary, small sanctuary, office) be retained and restored and that the rest of the building be either torn down or significantly revamped to include a more flexible space for the needs of a changing membership (as outlined under Goal #2). (In the process, consideration should be given to moving the bimah and to providing climate-controlled storage space for documents, as mentioned earlier; and the future needs of the Hebrew school and preschool must be considered.)

Funding for such a massive undertaking would entail examining the use of the rest of the synagogue land and possibly marketing some of it for development consistent with the activities and values of Ohavi Zedek Synagogue.

It is beyond the scope of this committee to recommend specific actions be taken with respect to either the synagogue lands or the barn. The synagogue needs a strategic plan which would assess our financial needs, assets, long-range goals as outlined here, and determine the best course of action regarding the property.

In addition, the synagogue's current policy of deferred maintenance needs to be replaced by regular, ongoing capital maintenance and replacement. The synagogue needs to create a maintenance plan, insure compliance with building and other codes, obtain maintenance contracts for significant assets not yet covered and review existing contracts. The maintenance plan needs to include (not in priority):

- roof inspection and repair
- window repair, replacement and caulking
- insulation improvement
- floor replacement and repair
- carpet replacement in main sanctuary and office
- interior and exterior painting
- cemetery upkeep and monument repair
- landscaping
- fire and security alarm system servicing and updating
- interior and exterior inspection
- electrical inspection and repair
- improvements to the sound system

In addition to regular and routine maintenance, the kitchen and kitchen storage area need to be updated and the kitchen equipment replaced, the grounds upgraded, the current classrooms need complete refurbishing, the current phone system needs to be updated, the cemetery's space needs need to be addressed (e.g. the North Avenue property needs to be surveyed and plots laid out), and air conditioning should be considered for the main sanctuary. The fact that regular repairs have been neglected for so long may mean that the synagogue needs to undertake a capital improvement campaign in order to improve the condition of that part of the building that should be retained.

**Goal #7: To provide the financial and institutional support to accomplish the mission in the following areas: endowment, capital improvements, balanced budget, governance, dues structure**

The committee recognizes the growing sophistication necessary for any non-profit to function successfully in this economy. The committee further recognizes the difficulty in utilizing volunteer leadership to manage an ever growing and ever more complicated financial institution.

Therefore, it is clear to all of us that the synagogue's fiscal situation needs to be addressed even more seriously. The current deficit needs to be not just controlled but eliminated. Therefore,

and for all the reasons enumerated above, the committee recommends hiring a full-time executive director with administrative responsibilities that include fundraising, programming, creating and implementing a strategic plan, and acting as business manager. Fundraising must be institutionalized and coordinated, as part of an ongoing program that includes planned giving and special events, as well as, a major capital improvement campaign.

As business manager (with experience in synagogue administration), he or she would supervise office and maintenance staff, update and oversee administrative functions (e.g. computerizing the tracking of memberships, updating the photocopier or telecommunications system), control the building's calendar and arrange for rentals and use, assist in the creation of annual budgets, participate in membership billings and collections, coordinate the non-ritual activities of the congregation, and work with the professional staff and the Board of Governors as needed on special projects.

### *Endowments*

Ohavi Zedek is quite fortunate to have a large and active endowment fund. It is a tribute to our previous leaders and members to have the foresight to have established and maintained this fund. Unfortunately the financial growth of this fund has been limited due to the need to use the income generated yearly to help support the annual budget.

A first step to change the investment strategy was the establishment of the 2nd. Century Fund which diverted all new contributions to higher yielding financial investments (e.g. stock funds). To date approximately 10% of the Endowment is invested in this way.

Currently, only funds designated for that purpose are added to the various endowment funds owned by the congregation, and undesignated contributions are included in current income. This practice has developed from necessity; nonetheless, consideration should be given to a different treatment of undesignated contributions. Perhaps gifts exceeding a specified amount should be added to the endowments, or a percentage of each gift set aside for the endowment.

The Board of Governors needs to encourage the establishment of endowments and develop a process to easily facilitate this. This would be done in conjunction with the Synagogue's attorney.

Responsibility for the endowment funds should rest with the Board of Governors. There is no practical or legal reason to delegate responsibility for fewer than all the members of the Board of Trustees, other than the historic explanation that this is the way they've been handled in the past. The board should retain competent advisors to recommend investments and place trades.

### *Balanced Budget*

The committee recommends the synagogue's budget be balanced by raising revenues, and not by cutting programs. To this end, we recommend a more professional and coordinated fundraising strategy be established.

The committee recommends exploring further the idea of assessing fees for some services to members and non-members.

### *Governance*

**Bylaws:** The bylaws of the congregation are too complicated and restrictive. Bylaws are intended to set out procedures and delegate responsibilities. These bylaws address too much detail. Because of their length and complexity, the document's provisions are frequently violated through ignorance. The committee recommends they be repealed and replaced. We also recommend specific revision in several areas:

1. The bylaws mandate not fewer than two dozen standing committees. This is too many: there are not sufficient volunteers to staff the committees, many of the committees overlap in scope and jurisdiction, and some committees do not function. A review of the current committees is in order and some should be consolidated; for example a finance committee should replace the adjustment, budget, and dues committees, and the memorials and cemetery committees should be combined. The bylaws should provide for a limited number of standing committees (finance, membership [short for "membership outreach and development"], memorial and cemetery, education, house and religious) and authorize the board to create and eliminate other committees as required.
2. The bylaws are too restrictive. For example, the congregations's endowment funds must be entrusted to "a state or national bank" pursuant to a trust agreement. Specific financial matters such as this, as well those relating the administration of the cemetery, and controls on income and expenses should be decided by the board of governors.

**Board of Governors:** The board should be the power base for the synagogue, making or ratifying all significant decisions, but the current Board of Governors is too large to function as the working board the synagogue so desperately needs. The size of the Board of Governors should be decreased. For example, this might be accomplished by eliminating representation of past presidents of the congregation, Men's Club, and Sisterhood from the Board.

It is an honor to serve as a governor, and with this honor comes increased responsibility and commitment. There should be a plan for getting congregants involved in synagogue and board activities and congregants should be encouraged to serve on the board. In particular, we should draw on the talents of those who educate present and future leaders. New directors should undergo an orientation dealing with the synagogue's mission and their responsibilities. Members of the board are accountable to the membership; absenteeism from meetings and failure to fully participate in board, committee and congregation meetings and activities violates the fiduciary duties of a governor and should be grounds for immediate removal.

Recently the board of governors had no chairperson: no one wanted the responsibility. The board

must develop a plan to encourage leadership from the congregation. In addition, the structure of volunteer leadership should be changed: the positions of president and chair should be combined. The president/chair should be elected by the board from the board. The vice president/president-elect should also come from the board, but other officers should be elected from either the board or the congregation (and not limited to the board, as has been the practice in the past). The new business manager/executive director should report to the president.

See Table IV

**Institutional Memory:** The members of the board of governors are volunteers, as are the officers of the congregation. As such it is traditional for these individuals to step aside as their terms expire to allow others to serve. Though commendable, this has an unfortunate consequence. Actions previously taken or not taken are frequently forgotten or the reasons for them become hazy. In order to preserve the congregation's institutional memory, the board of governors should maintain a "book of resolutions," which stores the actions of the board and the congregation by subject category. The congregation also needs to institutionalize its legal history by collecting all legal document (bylaws, book of resolutions) in one place. There is currently no such collection.

## Conclusions:

The report contains many ideas and recommendations that need to be explored more fully. We are not in a position to rank the recommendations in some order. Nor do we believe that financial considerations would limit implementation of many of the recommendations. It is the hope of this committee that the Board of Governors will seriously consider the recommendations of this report and be the catalyst for positive and necessary change.

TABLE I

Members of Committee

Selma Bloomberg

Rabbi Chasan

David Coen

Ducky Donath

Norrie Follansbee

Marv Greenberg

Cantor Held

Sue Kleinman

Barry Krikstone

Gigi Weisman

Carl Lisman

Michael Schwartz

Suzi Wizowaty

Barbara Zablotzky

## TABLE II

### Vision Statement

To be vibrant Jewish community in Vermont, embracing our traditions while actively participating in our changing Jewish world.

### Mission Statement

- A. To nurture our personal and shared Jewish identity.
- B. To respond to our spiritual, educational, cultural, and social needs.
- C. To give expression to Jewish values through our commitment to the community at large.

### Goals

- 1. To increase membership across all categories
- 2. To become a center for Jewish culture.
- 3. To inspire Jewish learning, spirituality and growth.
- 4. To increase commitment to the basic building blocks of Jewish life.
- 5. To provide leadership for and participation in gemilut Hasidim in the community at large.
- 6. To develop a blueprint for the use of our existing buildings and property in ways that meet the needs of our members of the community at large.
- 7. To provide the financial and institutional support to accomplish the Mission in the following areas:
  - ◆ Endowment
  - ◆ Capital Improvements
  - ◆ Balanced Budget
  - ◆ Governance
  - ◆ Dues Structure

TABLE III

## Long Range Planning Committee

Committee	Presentor
Membership	H. Krieger
Dues Structure	A. Goldberg
Abatement	A. Goldberg/S. Alpert
Budget/Endowments	D. Pasackow
Ways and Means	J. Alpert
Cemetery	S. Cohen
Education	M. Banks
Youth	B. Brody
House	D. Rome
Preschool	K. Perline
Seating	D. Pearl
Social Action	S. Hasazi
Sisterhood	S. Bloomberg
Religion	M. Lamden/H. Klein
Honors	B. Cohen
Plaques	P. Cohen
Archives	A. Goldberg
Staff	M. Lefkowitz/D. Gilbert
Bylaws	C. Lisman/G. Nahmias
Education Hebrew School	G. Weisman
Clergy	J. Held/J. Chasan
Congregation	Open Meeting

