



TIKVAH

2020

Building our Future

Ohavi Zedek Synagogue
Burlington, VT

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I. Introduction to Tikvah 2020

Tikvah 2020 Process

Tikvah 2020 is Ohavi Zedek Synagogue's strategic visioning and planning process which replaced the Long Range Plan developed in 1995. Great effort was undertaken in 1994 and 1995 to think through the future needs of our congregation and Ohavi Zedek had been operating from that plan for 14 years. In 2008 the congregation undertook a new visioning process, Tikvah 2020, to update the older 1995 Long Range Plan. We are delighted to share with you where Tikvah 2020 is today. With the Board of Directors' engagement and support, we have spent the past year reflecting on and planning for our future through 2020 – only seven years away.

History of Tikvah 2020

In 2008 and 2009 many of our OZ members engaged in Tikvah 2020 activity. In early 2008 a steering committee and an outside consultant convened nine community-wide parlor groups. In the last quarter of that year, core strategic discussion topics were developed. Seven areas of review were agreed on, and task groups were formed:

- - Worship – led by [Joy Livingston](#), focusing on how to enhance our worship opportunities.
 - Lifelong Learning – led by [Deb Lashman](#), looking at overall learning needs of our congregation, from early childhood to adult education.
 - Social Action – led by [Jeff Potash](#), continuing our call and activities for social justice.
 - Campus and Facilities – task group led by [Jeff Alpert](#), looking at both short-term facility needs, such as upgrading our kitchen and classrooms, and long-term opportunities available to us through our back acreage and Fern Hill.
 - Membership Engagement – co-led by [Deb Lichtenfeld](#) and [Jonathan Cohen](#), focusing on increasing membership and engagement opportunities for members.
 - Financial & Fundraising – led by [Leon Urbaitel](#), reviewing our present financial environment and building a long-term financial plan to guide us through the future.
 - Leadership – led by [Paul Growald](#), focusing on our lay and professional leadership needs and structure.

In 2009, the task groups met many times, as individual groups and together, to dig deeper into the action planning process and created draft action plans.

From 2009 through 2011, many of the recommendations in this report have been implemented, as noted in this updated document. In 2011 the Board began reviewing the document, and in 2012 a working group that includes Rabbi Joshua, Sharon Behar, Vivien Rabin Brown, Peter Pelaia, Jeff Potash, and Michael Smolin met to recommend next steps. While the information and recommendations have not changed, the document has now been reworked to organize it into four main sections:

- I. Beit Tefilah (worship)
- II. Beit Midrash (education)
- III. Beit Knesset (community)
- IV. Foundations: Leadership, Finances and Facilities

The recommendations have been reorganized to clearly state each goal, objective and action item. We believe that this reorganization will help us all to clarify the major issues we face and what our recommendations and action plan should be.

- Goals: High-level statements that provide overall context for what we are trying to achieve. They give clarity, direction, motivation and focus.
- Objectives: Lower-level statements that describe specific, tangible products and deliverables. They transform goals into specific targets.
- Action items: Steps that make goals and objectives happen. They map out a work process with a detailed schedule of key activities. They should have a timetable, determine resources required and identify who will coordinate. They should also have a pre-determined way to measure success.

At Our Heart...

Ohavi Zedek Synagogue is a vibrant, creative, egalitarian congregation where everyone is welcome. We strive to meet the worship, educational, and community needs of our members and neighbors, and to ensure that all members feel that they belong. *Ohavi Zedek* is Hebrew for "Lovers of Justice." We seek to live up to our name by recognizing that justice grows out of our values of loving-kindness, self-respect, and mutual support.

Our Mission

Judaism teaches the value of three aspects of our spiritual path: *Torah*, *Avodah*, and *Gemilut Chasadim*. At Ohavi Zedek, we bring these aspects into our worship, our study, and our role in the community.

- *Talmud Torah*, the study of Torah, is life-long learning. We respectfully engage the tradition of our sages and, together, shape it for our own time.
- Our *Avodah*, our devotion, is found in our celebration of *Shabbat*, the full range of festivals throughout the year, and in daily services.
- We support and strive towards *Gemilut Chasadim*, the sharing of loving-kindness. This is expressed through concrete programs, as well as through a standard of personal interaction.

Everyone is welcome, including Jews of all backgrounds, as well as non-Jews partnered with Jews or those searching for a spiritual path.

To fulfill our mission, we envision our synagogue as being a house of prayer (Beit Tefilah), a house of learning (Beit Midrash) and a community center (Beit Knesset) supported by the foundations of Leadership, Finances, and Facilities. Within each of these we recognize the need to set ambitious yet achievable goals.

II. Beit Tefilah (House of Prayer)

Goal:

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 as well as non-Jewish members of the families of Jews.
- 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.

Objective 1:

Increase joyful, engaging, and meaningful forms of prayer and meditation that meet the diverse needs of our community. We cherish the ancient Hebrew of our prayers and are committed to teaching the tradition as well as creating new forms of worship.

Action Items:

- Experiment with one Shabbat morning service incorporating innovative approaches and ideas. Working in collaboration, the Religious Committee and Worship Workgroup should plan the service which will be 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.

January 2013 Update: Shabbat in the Round Services are being held 3 times per year, concurrent with our traditional Shabbat morning services.

- Provide ongoing evaluation of Chumash and siddur.
- Include mix of traditional and new melodies.

Objective 2:

Raise level of Hebrew and liturgical literacy within the congregation.

Action Items:

- Build cadre of Torah and Haftarah readers.
- Recruit members to study to increase their skills and help them lead and/or participate in services.

- Educate congregation to more actively participate in singing Shabbat tunes.
- Develop audio CD/mp3 of OZ melodies and make widely available to our members to encourage more participation in singing.

Objective 3:

Expand the core of those who worship at OZ (Shabbat morning services and Friday evening services) including great participation of youth.

Action Items:

- Offer Shabbat dinners that will be characterized by engaging ritual and a lively, warm atmosphere.

January 2013 Update: Every Friday night, after services, a potluck dinner is held at the OZ house.

- Provide lunch at OZ after services
- Explore early morning study or yoga before services.
- Work with committees and affinity groups to encourage other Jewish families to host members in their neighborhoods (See Rivers Project – Temple Israel – Boston) for Shabbat dinners. One of these groups might be a “keeping Kosher” support group or dinner club.
- Folk Services on Friday night include more song and are family-friendly. 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*.

January 2013 Update: Family-friendly folk services are held on Friday evenings once a month from September to June.

- Provide variety of religious services (traditional, alternative, and age-appropriate).

January 2013 Update: In addition to our traditional Shabbat morning and weekday and Sunday minyan services, we now include:

- *Kabbalat Shabbat on Friday evening (including a folk service once a month)*
- *Shabbat in the Round services several times each year held concurrently with our traditional Shabbat morning services*
- *Tri-annual family-friendly Shabbat morning services held concurrently with our traditional Shabbat morning services.*

- Incorporate Friday night worship with natural world. 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.
- Gather ideas and innovations from other congregations. 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.

Objective 4:

Increase Congregant Ownership of Worship Innovations

Action Items:

- Religious Committee should develop an inclusive process so that all congregants feel they've had a chance to express ideas and concerns. 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*.
- Develop a calendar of worship services in different space (in the round), locations (under stars) and times.

III. Beit Midrash (House of Learning)

Goal

Expand the core of those who 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 that engages young families, teenagers, and adults in educational experiences that deepen their understanding of their own Judaism and its place in the larger world.

Help our Hebrew School students and their families develop love for and commitment to life-long Jewish practice and communal identification, and to strengthen the links between formal and informal Jewish education in the lives of our young people.

Promote lifelong learning through adult education that includes both Jewish and secular topics and promotes intergenerational connections.

Objective 1:

Engage Young Families:

Action items:

- Implement the “OZ Wants 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.

January 2013 Update: In 2011 founded a weekly baby/toddler/preschooler playgroup which averages 10 families per week.

Objective 2:

Create an active Adult Education Committee designed to promote lifelong learning, to create an understanding of the scope of Adult Education at OZ and to create an active program.

Action items:

January 2013 Update: We now have an active and vibrant Adult Education committee and programming.

- Solicit participation from people in the congregation and the broader community.
- Get active participation from Board members
- Board to develop financial resources to support this effort so we are able to develop and

implement programs with outside scholars and educators.

January 2013 Update: In addition to special funds and endowment funds, as of FY 2012-2013 Adult Education is now part of OZ's annual operating budget and is being funded.

- Have the adult education committee and staff 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)

Objective 3:

Continue to explore early childhood programs

Action items:

- Undertake a competitive market review of preschools.

Objective 4:

Youth Groups: 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. Particularly vital is a strong program for post Bar/Bat Mitzvah students.

Action items:

- Continue having a staff person with 10-20 hours/week dedicated to the youth group.

January 2013 Update: We have two part-time Young Judea directors and two part-time Young Judea advisors to fully staff YJ.

- Include social, educational, religious, community service and cultural activities in the youth program.
- 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.

January 2013 Update: OZ's youth group remains affiliated with Young Judea.

- Prioritize scholarship funds to help members attend these programs.
- 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).
- Review possibility of merger of OZ and Temple Sinai Hebrew schools.

IV. Beit Knesset (Community Center)

A. Membership and Outreach

B. Social Action

A. Membership and Outreach

Goal

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 strive to make OZ a social center that fosters friendships and joy between Jewish families, inclusivity for our elders, and opportunities for youth to participate fully and equally as valued members of a caring community.

Objective 1:

Inspire members to greater engagement and find new ways to attract scores of unaffiliated Jews around the greater Burlington community.

Action items:

- Holiday Celebration: Build on OZ strengths and energy around holiday celebration. Get more people involved.
- Seek out underrepresented demographic groups. Recruit and develop OZ's Membership & Outreach standing committee and other ad hoc teams.
- Make OZ's website and technology offerings more informative, timely and robust so that our members routinely make more frequent visits to the website. Explore ways to deepen relationships. Encourage threaded conversations.

January 2013 Update: In 2011, thanks to JVillage's generous donation, OZ's website was updated and modernized.

- 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 chavurot (5-6 families each) that meet monthly at rotating homes with all the smaller groups coming together for a larger gathering every few months.

January 2013 Update: In 2012 a family Chavurah was developed with families in the Richmond/Williston area with support and funding from OZ. A women's group has also been meeting spearheaded by Rabbi Jan.

- Develop a membership profile system to better understand members' skills and interests.

January 2013 Update: In 2011 a volunteer profile system was implemented by our Executive Director.

- Encourage that all new members will fill it out and meet with the Rabbi and/or Executive Director as part of the new member process.

January 2013 Update: Since 2011 all new and existing members have been asked to complete the profile. All new members have met with either the Senior Rabbi or Executive Director prior to joining.

- 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.
- Create a realistic plan to increase membership. 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.

January 2013 Update: Due to the work of our Executive Director and staff, we have grown in membership in both 2011 and 2012 for the first time in over a decade, adding more members than we have lost. In both 2011 and 2012 we added 19 new member families, with a net increase in membership from 340 at the start of 2011 to 368 at the end of 2012.

Goal 2:

Become a more central Jewish social center that fosters a culture of inclusiveness, friendliness, joyfulness and a general sense of excitement to be at OZ. Develop Jewish Community Center, without walls programming, e.g., sports leagues, fun runs for charities, bike trips, hiking, picnics, swim days, etc.)

- Develop professional staff and volunteer leadership to create more programs to reach out to people “any way, any time, and anywhere.”
- Collaborate with Temple Sinai leaders (and leaders of other local congregations) on merged programs.

B. Social Action

Goal

We seek to elevate the place of social justice on our synagogue communal agenda. 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.

As “lovers of justice” our goal is to be recognized as a center of social justice that fosters fairness and peace in relationships within the congregation, in the local community and beyond.

We seek to deepen our ties to other religious organizations to create an interfaith presence in northern Vermont that realizes the values of our varied spiritual traditions.

Objective 1:

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

Action items:

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

Objective 2:

Honor the legacy of the “Shalom Shuk” (formerly Sisterhood Thrift Shop) and Resettlement Mission. 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.”

Action items:

- The social action committee will hold a community celebration bringing together OZ and VRRP members, to officially “rename” and repurpose the Shalom Shuk as well as to honor its past. We will publicize the celebration, put the story on the web, and make a banner for the barn.
- 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.”

January 2013 Update: In 2010, thanks to the efforts of Kay Stambler the Shalom Shuk was renovated. Since that time it has continued to grow and thrive. Each year the Shuk donates thousands of dollars worth of goods to new refugees in our community and people in need through partnerships with VRRP, COTS, JUMP, and several other organizations. In addition, the Shuk is providing retail job training to refugees and others in need.

Objective 3:

Develop a Social Justice Calendar

Action items:

- Create a calendar and communications plan for social action/social justice events to engage all ages. Develop a yearlong project, entitled “Tzedek and Tzedakah” (Justice and Righteousness), together with a yearlong calendar of events, to educate, engage, and organize the OZ community.
- 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.

January 2013 Update: The “Tzedakah Box” placed in the lobby each month supports a different charity, selected by a different Hebrew School class.

- 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.

January 2013 Update: The Hebrew School and Social Action committees have coordinated on several events and activities, including Mitzvah Days, Yom HaVatikim (honoring elders) and the Tzedakah Box.

- Work with the Hebrew School Principal and Rabbi 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.

Objective 4:

Cultivate Interfaith Relationships. Support the Vermont Interfaith Action and other community partnerships to realize the values of our varied spiritual traditions.

Action items:

- Continue to provide leadership in Vermont Interfaith Action (VIA). 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.

Objective 5:

Help the Facilities Task Force explore the needs of seniors. 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.

Action items:

- 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.
- 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.

Objective 6:

Create a designated “social action” fund and to encourage congregants to support efforts to facilitate “action” both within our congregation and the larger community.

Action items:

- Create a dedicated fund for Social Action Committee efforts focused on Supporting and Sustaining Just and Righteous “Actions.” The Ellie Potash Fund will be renamed the “Ellie & Milt 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.

January 2013 Update: The Milt & Ellie Potash Social Action Endowment Fund has been established to provide funding for Social Action activities.

V. Foundation -- Making Vision Reality

A. Leadership

B. Finance

C. Facilities—our physical home

A. Leadership

Goal

We aim to maintain 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 works closely with committee chairs and that inspires increased volunteer leadership and participation by the congregation. 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.

Objective 1:

OZ should employ a full-time executive director to support its volunteer base.

January 2013 Update: As of February 2011, OZ has had a full-time Executive Director.

Objective 2:

OZ's volunteer base will need to expand to provide in-reach and outreach programs.

Action items:

- Find ways to match volunteers with a full range of opportunities. This includes one-time projects, short term strategic work groups, and work teams.
- Create a volunteer pyramid with multiple levels of engagement, from board to a one-time task help; development of recruitment techniques;
- Use profiles to pair volunteer needs with member passions
- Track the number volunteers on committees and work teams
 - a) Create excel spreadsheet for tracking.
 - b) Set goals for greater engagement.

- c) Make volunteer appeal and financial appeal as part of High Holiday appeal process (see Fundraising Goal).
- Create major volunteer recognition event, perhaps with a major speaker.
- Select a mitzvah hero to honor.

Objective 3:

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

Action items:

- Research other synagogue staffing models and develop a staffing plan.
- Provide leadership development for staff, and both potential and current lay leaders.
- 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 2020 goals are part of the process.

Objective 4:

Manage clergy transition with a careful rabbinic search and a smooth transition that actively involves the congregation:

Action items:

- Work with Rabbi Chasan on the timing his retirement transition. Plan should include a celebration of Rabbi Chasan's rabbinate in last year(s).
- Create a rabbinic succession plan: Provide a transition plan for the new rabbi. Set up introductory meetings with the community, etc.

Objective 5:

Build an effective board.

Action items:

- The congregation should 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. 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.

- Hold annual board orientation w/expectations.

January 2013 Update: Since 2011, new Board members have received a detailed orientation and the board responsibilities/expectations document approved in 2011.

- Use annual board calendar to maintain sharp board focus.
- Provide necessary by-laws amendments to ensure these changes.
- 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 assess board member satisfaction with meetings.
- Utilize a board improvement self-assessment tool.
- 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.

Objective 6:

Ensure the role of community educator to manage the religious school, membership outreach and holiday celebrations. The community educator should have community building skills.

Objective 7:

Create an executive committee/group of the board to partner with the clergy and executive director.

January 2013 Update: There is currently an active executive committee on the board.

Objective 8:

It is clear that OZ does not have the number of skilled daveners and Torah readers to ensure that the Rabbi 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.

January 2013 Update: OZ has a part-time assistant Rabbi whose primary function is fulfilling the responsibilities of the cantorial position.

Objective 9:

Develop effective nominating committee.

January 2013 Update: In August 2011 a new nominating committee structure was implemented. All candidates (including present board members) are interviewed by at least 2/3rds of the committee. New individuals are actively recruited from across the congregation.

Action items:

- 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.
- 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.
- Test prospective board members through prior committee service

B. Finance

Goal

Understanding the importance of the Mishnaic passage from Pirke Avot “that without bread, there can be no Torah,” we must address the basic core financial needs of the synagogue in order to support the Three Houses. We seek long-term fiscal sustainability and stability for Ohavi Zedek through the development of a culture of giving, responsible spending, and fiscal transparency. We must develop the means to implement the other portions of this strategic plan and to meet our evolving needs. Expenditures must be balanced with revenues so that the synagogue can maintain a healthy financial outlook and remain a force for Judaism in Vermont for future generations of Jews.

Objective 1:

Fiscal sustainability and stability

Action Items:

- Grow our endowment to ensure adequate sources of operating funds during the years ahead
- Explore eliminating charges for High Holy Day Seating

January 2013 Update: High Holy Day seating accounts for approximately \$40,000/year in income. Coupled with the Open Fair Share dues structure implemented in 2011 it is not currently practical to eliminate the charge for seating.

- Launch a values-driven campaign to get to know more of OZ’s members. “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 should remain “open to all,” and no financial records will be requested.

January 2013 Update: OZ remains committed to allowing all Jews to become members regardless of financial circumstances. See also objective 3 below.

- OZ leaders will strive to proactively engage the membership about financial sustainability.

January 2013 Update: initiated periodic “town meetings” in 2011. More outreach planned in connection with upcoming rabbinic search.

Objective 2:

Foster a sense of financial responsibility within the community while actively engaging larger donors

Action Items:

- Build a strong “case” for giving and train a group of people to make the case to larger donors. Support and connect with these donors throughout the year.
- Move our annual campaign to the High Holiday period like most congregations.

January 2013 Update: In 2010, the annual appeal was moved to the end of year to coincide with families’ year-end tax planning.

- Monitor how many members have been engaged. There will be reporting to the community on progress on dues, fundraising, and designated giving. This will increase the confidence and commitment of donors.

January 2013 Update: the Executive Director monitors and reports on giving. Community updates are made at congregational meetings, Board meetings, via the Voice, and through e-mails as appropriate.

- 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.) as well as support for financing personnel during rabbinical transition.

Objective 3:

Develop an efficient and equitable dues structure that will maintain our community and enable it to grow.

January 2013 Update: In 2011, at the urging of our then new Executive Director the Board voted to implement an open Fair Share Dues structure over the following two fiscal years. This dues system is now fully in place in 2013. Members are asked to pledge dues based on their own financial situation rather than paying (or asking for an abatement from) one size fits all preset dues categories. The net result has been substantial VOLUNTARY dues increases in the fiscal years since: 2011-2012 (6% increase) and 2012-2013 (9.5% increase). The membership is happy with the change and OZ is seeing unprecedented growth.

Action Items:

- Dues System: 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.

Objective 4:

Eliminate our debt and find ways to fund new projects and initiatives

January 2013 Update: As a result of our overarching financial work, OZ has maintained budget surpluses for the last several fiscal years (2010-2011 and 2011-2012). This has allowed us to pay down the debt accumulated from past deficits to ~\$41,000 as of July 2012.

Objective 5:

Revamp our financial management structure and reporting to increase ease of understanding the big picture of OZ finances.

Action Items:

- Move all the "below the line" items to "above the line, include ALL income and expenses as a part of our operating budget.

January 2013 Update: Implemented for 2012/2013 budget.

- Create a complete and visible cost center approach to our budgeting and financial reporting.

January 2013 Update: Implemented for 2012/2013 budget.

- Give functional committees a clear budget with expense allotment and income goals.

January 2013 Update: Implemented for 2012/2013 budget.

- Budget annual reserve/replacement funds to meet the on going needs of OZ's physical plant and to reduce reliance on the Building Fund (which should be maintained for emergencies only).

January 2013 Update: Planned for 2013-2014 budget.

C. Our Physical Home-- Facilities

Goal

The current generation of Ohavi Zedek's membership were handed a gift from the last generation who 60 years ago built a magnificent building and developed a wealth of physical assets for us. We must continue to maintain and improve the physical condition of the synagogue building so that we can pass on an even greater gift to the next generation. We must address our short-term needs, such as renovating the kitchen and developing additional classroom space. We will create a process that determines the future uses of all of our physical assets, including the undeveloped land east and north of the building. Included in this will be determining the long term future of Fern Hill Senior Living Center which will revert to Ohavi Zedek's control after our contract with HUD ends in 2020.

Objective 1:

Make a decision concerning Fern Hill Property after 2020

Action Items:

- Work closely with the Fern Hill board to review all options.

January 2013 Update: The Fern Hill Board and the Ohavi Zedek Board have begun this work. Timelines are being developed and the two boards are working to define OZ's priorities for the property.

Objective 2:

Decide whether and how to develop other OZ property.

Action Items:

- Do research on commercial real estate value of developing the land behind OZ.
- Review unfinished business from the Capital Campaign
- Prioritize and consider how developing the land and adding a new structure or wing could help us meet our current needs. Issues to consider:
 - Additional Classroom Space
 - Preschool Space
 - Youth Lounge
 - Additional Office and Storage Space
 - Facilities Upgrades and Renovations
 - Handicapped Access Upstairs

- Worship Space
- Chai Adam Mural
- Kitchen Renovation
- Parking
- Possible Jewish Community Center (see also objective #3 below)

Objective 3:

Consider Shared campus with Temple Sinai

Objective 4:

Maintain and improve current facilities.

Action Items:

- Upgrade kitchen

January 2013 Update: In January of 2013 the board authorized the preliminary use of funds to renovate the kitchen by taking a long-term loan from our own available resources. A committee is actively working to obtain proposals and quotes while the financing is finalized.

- Make classroom space a top priority.

January 2013 Update: In the summers of 2011 and 2012 the facilities team dedicated time to updating the classrooms. Furniture was replaced, the rooms were de-cluttered, cleaned and painted, and the two upstairs classrooms were divided with a permanent wall (rather than the curtain partition in use). While updating the existing spaces has helped, long term we must still address the need for at least two-three additional classrooms.

- Create a reserve/replacement report to monitor the building and its systems to evaluate useful life and allow for budget planning, rather than relying solely on the Building Fund.

Objective 5:

Explore changes in worship space and venue.

- Explore moving bimah to center of sanctuary.
- Explore conversion to moveable chairs from fixed pews.