

## Imagine 2025 Report to the OZ Board (Phase 1)

### Executive Summary

Imagine 2025 will be Ohavi Zedek's road map for the future. Sitting firmly on the foundation created through Tikvah 2020 (OZ's strategic visioning plan) this new road map will further develop specific opportunities for meeting the needs of the future for our congregational community.

Phase 1 of Imagine 2025 set out to critically assess the current state of OZ. This included SWOT analysis, 1:1 staff interviews, membership and financial modelling, and 19 focus groups with 125 OZ members across various groups and interest areas.

The assessment identified areas of strength where OZ is meeting members' needs including:

- **The theme of "Community"** - Members have made deep connections or felt OZ was "my home" (the most commonly cited OZ "strength" in focus groups).
- **Full Circle** - A Highly successful and in-demand program, and universal praise for Erikca, staff and program. Opportunity to engage with broader OZ (currently siloed).
- **Hebrew School** - Confidence in Naomi and Cantor; Appreciation of OZHS being a connection to a Jewish community; There are opportunities to improve student numbers and attendance, and for OZ to connect with connecting OZHS families through more relevant programs, communications and with regular prayer services.
- **Social Action** - Key to OZ's identity, strong community reputation and core of volunteers.
- **Adult Education** - Broad and strong programming (opportunity for multi-generational).
- **Certain Jewish spiritual and religious needs** - Core Shabbat and Minyan group; Rabbi strengths with Torah, Parshas and being visible in Community; Cantor's warmth and musical talent; opportunity remains to better religiously engage (especially) families.

Phase 1 also identified challenges and opportunity areas to address including:

- **Declining Membership Outlook** - 3-4% downward annual trend (aging demographic, not recruiting and retaining younger age groups, challenge with empty-nester segment, and competition from Sinai and Ruach haMaqom, other congregations (including online) and secular activities).
- **Communications** - Defining purpose, branding, and delivery of communications.
- **Religious and Spiritual Engagement, Especially for Families** - A need for family friendly services, music and joyfulness, and accessibility for families including inter-faith families.
- **Community Engagement & Connectedness** - Opportunity to activate low-engagement members; Connect and engage segmented membership groups and siloed functions; Widespread desire specifically for a JCC (*Jewish Community Center*) style model.

- **Financial Sustainability** - Current trend is unsustainable (significant gap). Need to explore new revenue opportunities and operating model to stop operating at a loss.
- **Operating Challenges** - Need better ways of working and work culture. Need to address execution challenges stemming from bandwidth (resource constraints) and processes.

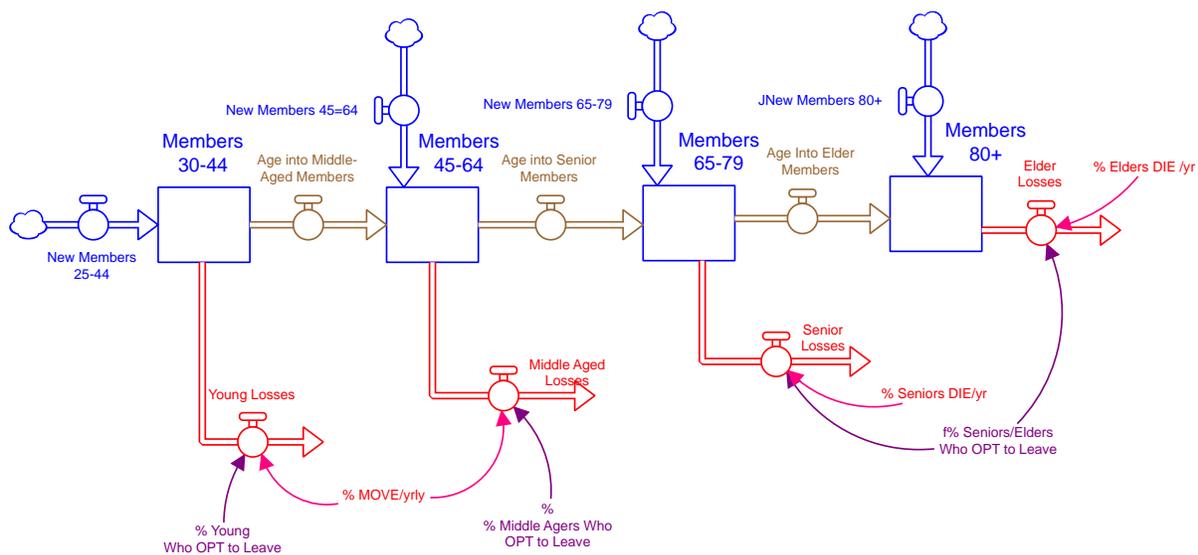
Looking forward, in Phase 2 we will cluster and prioritize the needs and opportunities coming out of Phase 1, define a long-term strategy and goals, develop both short-term and long-term objectives and success criteria, and begin building a roadmap for action.

## I. Starting Point: Understanding the Dynamics of OZ Membership

Our most current (2020) census of OZ members is highly instructive (see table below). What is striking is that we have *three times as many congregants over the age of 80 as under the age of 45*. Our average congregant age is 65.

TOTAL	Ages 30-44	Ages 45-64	Ages 65-79	Ages 80+
268	21	91	96	60
% of total	8%	34%	36%	22%

According to a 2015 membership list, *our numbers have fallen by more than 20% during the past five years*, from 333 to 268 household memberships. Using additional data (sadly incomplete), a simple computer model (see below) was created to capture the dynamics through which new members joined (shown in blue for each of the 4 age categories) and existing members were removed (shown in red and involving deaths, moves, and voluntary departures) over the past 5 years. (NOTE: A more elaborate explanation of the model appears in Appendix A.)



After proper calibration (using annual trends to smooth anomalies in the data) the model informs what's been happening based upon some broad trends:

Table						
	2015	2016	2017	2018	2019	Final
Members 30-44	28	26	24	23	22	21
Members 45-64	131	121	112	104	97	91
Members 65-79	107	105	103	100	98	95
Members 80+	67	66	64	63	62	61
TOTAL OZ MEMBERS	333	317	303	290	279	268

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- (1) The small and diminishing numbers of young congregants reflects BOTH small annual admissions (est. 6/yr.) AND high rates of turnover (averaging 20% a year). In terms of new members, fully two-thirds joining OZ during this period have been 45 years or older. This speaks volumes to OZ's "attractiveness" to younger congregants. At the same time, a high turnover rate underscores a conscious decision not to become long-term members (Focus Group findings below provides more insight into both patterns).
- (2) Middle-aged congregants (whose children presumably have aged out of the Hebrew School) also are subject to higher rates of departure than senior (65-79) and elder members (with 8% total leaving due to moves and conscious departures).
- (3) And finally, with large numbers of elderly congregants, OZ's population has been subject to growing numbers of members dying (the model's calculations, mirroring actual data, uses an annual mortality rate of 5% for 65-79-year old's and 13% for 80 and above).

(Below are the annual rates used by the model to define admissions to and departures from each of the age groups)

New Members Joining Yrly	
	Value
# Young New Members	6
# New Middle Age Members	5
# Seniors New Members	5
# Elders New Members	2

**Factors Changing OZ's Membership - People Coming and Leaving**

Involuntary LOSSES Annually	
	Value
% Elders DIE /yr	13
% Seniors DIE/yr	4
% MOVE/yrly	5

Members CHOOSING to Leave	
	Value
% Young Who OPT to Leave	20
% % Middle Agers Who OPT to Leave	3
f% Seniors/Elders Who OPT to Leave	2

If we assume that these three major patterns of behavior continue unabated, the model projects a future with further declines (see output below). Simply put, without any growth in OZ's under 45 population, the ongoing dynamics of aging will continue to shrink the size of the congregation by a significant fraction in the coming years, with likely intensifying financial implications. This speaks loudly to the urgent need for action.

Membership 2030- Age and Total

	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	Final
Members 30-44	21	20	20	20	19	19	19	19	19	19	19
Members 45-64	91	84	78	72	68	64	61	58	55	53	51
Members 65-79	96	93	91	88	85	83	81	79	77	75	73
Members 80+	60	58	57	55	54	53	52	50	49	48	47
<b>TOTAL OZ MEMBERS</b>	<b>268</b>	<b>256</b>	<b>245</b>	<b>235</b>	<b>227</b>	<b>219</b>	<b>212</b>	<b>206</b>	<b>200</b>	<b>195</b>	<b>190</b>

*FOCUS GROUPS: A total of 19 focus groups were conducted with 158 participants. With groups organized in several cases around particular interests (e.g., Social Action, Adult Education, Religious Practices), some congregants chose to join more than one discussion. All told, a total of 108 OZ members participated in this process. What follows are some key points that emerged. A full set of notes for all 19 groups appears in Appendix B.*

## **II. Using Focus Group Information to Help Inform Dynamics Around OZ's Young Congregants (under 45 years of age)**

Three Focus Group sessions were intentionally directed at our youthful cohorts: one with preschool parents, two with Hebrew School parents (17 participants total, with most under 45 years of age). Responses to a number of questions discussed during these sessions are included in the Appendix (with notes from all of the Focus Groups). Key points, particularly helpful in light of our membership issues, are presented below:

**Hebrew School Parents:** Of the 10 parents who participated in two focus groups. *seven were in interfaith marriages*. Connecting their children/themselves with a Jewish community was cited by 5 of the 10 parents as being most important to them. Everyone expressed confidence in Naomi, with several praising her flexibility in meeting their particular needs. Hebrew school shortcomings center around irregular attendance (with Hebrew language instruction impacted; along with overall content continuity, depth, and richness). Diminishing student numbers have forced classes to combine, impacting peer relationships and learning. Broader concerns (expressed by almost everyone) was *their discomfort with regular prayers services* (being described as family unfriendly; together with the lack of opportunity to make a deeper connection with larger congregational activities, including social action. Besides Naomi, Cantor Steve was cited by 2 parents and praised for his warmth.

When asked to brainstorm opportunities, proposals for change include (1) Junior Congregation services (which 5 parents are already working on!) where children can lead/be active; possible family-friendly activities during regular Shabbos services (including opportunities for students to participate, parents to learn, and places for students to go with snacks); and (2) Summer activities/camps.

**Preschool Parents:** Seven parents participated. Three had OZ connections prior to sending their child/children to Full Circle; *3 learned about Full Circle from OZ members*; and one followed Erica from Chabad to OZ. Parents universally praised Erica and the staff as outstanding teachers, deeply caring, whose child-centered and nurturing curricular approach fostered high quality and nurturing experiences for their children. Four of the 7 described the synagogue connection as meaningful to them, and 2 commended Cantor Steve's contributions to their children's education (joyful music and "not heavy-handed" instruction); the one non-Jewish participant expressed delight in her child's learning about Jewish values and feeling welcome in the community. On the negative side, the majority of parents felt "segregated" from the larger community and congregation, having no connection with Rabbi Amy and feeling unwelcome in

larger social gatherings and religious services. Opportunities identified included connecting with Hebrew School children (as role models) and their parents, elders and others within the OZ congregation.

### III. Broader Focus Group Findings

#### A. Strengths

Prior to addressing problems or shortcomings, it should be understood that the Focus group participants, not surprisingly identified multiple areas of strength. Most often mentioned here were:

- The theme of “community.” This is undoubtedly the strength most cited by OZ congregants, both for having come to OZ (to join an active Jewish community in Burlington, Vermont) and for having found what many described as “my home” at OZ. Communities can be religious/spiritual and social. People have made extraordinary connections, in diverse places including Wednesday mornings (for over 30 years), the Kitchen, as well as in preschool, Hebrew School, and other social gatherings.
- Clergy – Multiple individuals praised Rabbi Amy’s strengths with Torah Study, Parshas, and visible community outreach (interfaith, anti-racism). Cantor Steve’s character (“warmth,” “sincerity”) as well as his musical talents were similarly praised.
- OZ as a “giving” community. This included mentions of OZ’s identity within the community for social action; its core of dedicated volunteers who take pride both in “giving” and in being a caring community; its preschool; the Shuk.

#### B. Weaknesses.

It is clear that there are issues of discomfort or unhappiness that may help inform why OZ isn’t growing:

- In the area of often mentioned issues, a majority of congregants expressed difficulties with narrowly defined religious practices, problems connecting with Shabbos services based on time, what many described as an “intellectual bias” and limited opportunities for spiritual expression; while a majority of interfaith families and young people felt they lacked the tools with which to meaningfully participate in the larger religious community.
- There’s a lack of joyfulness, often associated with a lack of music at OZ.

- Empty-nesters described feelings of disconnection with OZ following the graduation of children from Hebrew School. Several OZers in their 50s-60s, having once been leaders in youth-oriented activities, seem to be struggling with finding a “place” at OZ.
- Discomfort was often stated around a never-ending financial crisis, not having a place to share concerns, siloed groups, and lay and professional leadership that appeared overburdened, and at times inaccessible.
- Our building was seen as dated and unattractive. As well, it was noted that our technology infrastructure needs to be updated.
- Lack of communication, lack of information was cited by many congregants.

## **SOCIAL ACTION**

Social action at OZ has had a long and rich history, both through clerical leadership (Rabbis Wall, Chasan, and now Small) and, during the last twenty years, by lay leaders who have engaged in diverse programming dealing with relevant topics from antisemitism, racism, islamophobia, anti-immigration, and age bias, just to name a few. OZ has sponsored speakers from diverse religious and ethnic perspectives, had film and book discussion series, as well as embracing diverse communities in celebrating shared values (community sedars).

### **Current Strengths:**

- Rabbi Amy’s work with interfaith groups, racial issues, and Israeli-Palestinian learning.
- Lay led Dialogues/conversations (anti-Racism, Salaam/Sholam).
- Shuk

### **Opportunities: Focus group participants acknowledged opportunities for:**

- Improved communications/connections with Adult Ed and the Hebrew School.
- Larger theme(s) with which to infuse social justice across synagogue activities.
- The Shuk needs to be highlighted for its’ outreach and commitment to immigrant/other needy communities.
- Integration between the Shuk, G’mach and social action.

## **ADULT ED**

OZ’s Adult Education programming offers rich “Jewish” offerings – some conducted by clergy (e.g., iEngage, Hebrew and/or Jewish studies), others by lay members of the congregation. The latter are quite diverse, some focusing on meaningful/relevant issues and incorporating book discussions, film, and Feen scholars; while others strive to bring Jews together in joyful community.

Opportunities: The committee is aware that it needs to work on:

- Schedules and programming for working and younger people.
- Experimenting with intergenerational programming.
- And more intentional outreach into OZ, and beyond the OZ congregation.

## RELIGIOUS/SPIRITUAL

OZ's Saturday service meets the needs of a small but dedicated group of regular Shabbos goers. For many, change (e.g., alternate services, additional English) feels like it encroaches on their spirituality/religious practice. And that these changes are happening despite their input.

At the same time, a majority of OZers, spearheaded by interfaith families (most of our younger members), lack the background with which to engage. They are joined by others for whom the traditional service is (1) too long, (2) too intellectual (versus spiritual), (3) lacking in communal joy (notably relating to the dearth of music and lack of instruments; and/or contemplative or meditative dimensions that heighten personal spiritual joy.

All of this speaks to opportunities raised in almost every focus group (religious and non-religious):

For Preschool and Hebrew School families, opportunities to connect with prayer in the large sanctuary could take different forms:

- Junior Congregation where students actively participate in short services (singing, moving/processioning, giving Parshas) that generate comfort and familiarity with prayer and space (preparation for B'Nai Mitzvah?) and allow parents to watch and learn;
- Family-Friendly services (short, possibly incorporated into regular services), allowing for positive interaction between intergenerations, as examples.

**For the larger community music and communal singing, potentially including more musical instruments and/or a choir, might be incorporated into Friday Nights (young-family friendly), regular Shabbos services, or alternative services.**

Daily minyan was sighted as an opportunity for family engagement. An opportunity for families to learn one or two major prayers together, and in a short service.

## Conclusion

While the focus group findings revealed both opportunities and challenges, the biggest take-away is the overall enthusiasm in support of OZ. **This process high-lighted the desire of congregants to participate more actively with each other and within the OZ community.** Our

congregation loves the community that has been created. And they want to participate and help OZ bridge to the future.

## **Imagine 2025**

### **Phase 2**

### **Moving Forward**

This phase will be focused on planning. Taking what we have heard from the focus groups, staff meetings, financial review, competitive analysis, Covid reflections and beginning to frame a plan for the future.

Additionally, this phase will provide the opportunity for those that were in the focus groups, as well as those that did not participate, to jump in with the board and Imagine 2025 to think and plan for the future. **This is a big opportunity for broadening congregational engagement into our future.**

### **Setting goals and objectives**

- Set goals, objectives and strategy for the next 3 - 5 years
  - Prioritize target markets
  - Identify competitive differentiators - what does OZ own that our competition does not.
  - Develop vision - a clear, simple, inspiring statement of PURPOSE
  - Set goals
  - Set measurable objectives (everything from membership to engagement to financial)

### **Evaluate and restructure**

- Research new board and committee structures
  - Develop a more integrated and aligned structure and work process
- Review existing staffing structure based on the opportunities for the future
  - Create a staffing model for the future
    - Participants in this process
      - Board, Rabbi, ED, Cantor and Educator
      - Imagine 2025 team
    - Timeline – Recommendations delivered at the March board meeting
    - Review - with community in April

### **Establish task groups**

7 areas of focus have been identified from phase 1. It is recommended that for each area a task group be assigned to study and explore options for the future. The task groups will recommend action plans for each area.

Each task group identified below includes the integration of a number of existing committees and several additional key areas for exploration and development.

The task groups will be comprised of 6 - 10 people - size depends on the specific task group and their goals. While some members of the task group may come from existing committees, the majority of task group participants will be outside the existing committee structure.

These task groups will operate separately from the on-going committee work.

Task groups will report directly to the board. Each task group will include at least one board member. They will be operational from 3 months to 6 months - depending on the group. They will provide monthly status reports to the board.

## **Task groups**

### **- Community Center Task Group**

Building off the successful efforts of the adult education committee, determine what an Ohavi Zedek Synagogue and Community Center could be. Possibilities coming out of the focus groups include learning, arts, music, theatre, museum, store, recreation etc. This task group will also look at the opportunities for building and campus enhancements.

The Community Center would be one of the major doorways for the larger Jewish and non-Jewish community to participate and grow with OZ.

### **- Family Engagement Task Group**

Building off the energy of the pre-school and Hebrew school, expand the opportunity for greater family involvement and integration into the larger OZ community and the larger Jewish community.

### **- Social Action Task Group**

Harnessing the energy OZ congregants have for social action/justice. Develop a more integrated and pro-active approach between G'mach, the Shuk, and social action.

### **- Religious/Prayer/Spirituality Task Group**

Conservative synagogues all across this country are developing multi-plex opportunities to meet the prayer needs of congregants. How can a small congregation of 300 member families meet the diverse needs of the congregation without taking anything away?

### **- Financial Task Group**

Review existing financial model, income and expenses. Explore new funding opportunities. This will include the development and finance.

**- Post Covid19 Task Group**

What will be happening the day OZ's doors are open again. How will we welcome a community starved of relationship opportunities? What "new" can we welcome them with. Let the celebration begin.

**- Membership engagement Task Group**

All of the above will play into a revitalized membership retention and recruitment strategy. This will include the development of a modern approach to marketing and communications.

**Timeline** - monthly progress reporting to the board starting in March

**Phase 3**

**All about action**