

Report of the Strategic Planning Committee

Presented to the Board of Trustees of K'Hilat Ha'Aloneem, April 21, 2014

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Overview

This report from the Strategic Planning Committee of K'Hilat Ha'Aloneem includes recommendations intended to help the Temple broaden and deepen its support for and impact on the Ojai Jewish Community. The committee is prepared, together with additional volunteers, to implement these recommendations when they are approved. Therefore, the committee requests that the Board review the report and approve it for submission to the congregation for their approval.

Mission of the Committee

The Temple was formed to serve the Ojai Jewish Community. Therefore, the committee adopted the following as its mission statement:

Develop a comprehensive strategic plan that the Temple will implement to enhance and strengthen the Ojai Jewish Community.

The recommendations in this report constitute such a plan. They will help the Temple become a catalyst and magnet for the Community, causing the Community to be more active and involved. Even though the Temple is thought of primarily as a religious organization, many of our recommendations extend beyond religious practice. They seek to fulfill the purpose stated in our constitution to “establish (1) a community center to promote Jewish religious purposes and (2) a synagogue to promote the enduring and fundamental principles of Judaism.”

Summary of the Plan

The committee believes this comprehensive plan covers all aspects of the Temple's activities. Our recommendations have been grouped into five categories:

1. Marketing & Membership – Become the catalyst and magnet for the Ojai Jewish Community through a set of marketing, membership, and other activities.
2. Religious & Educational Activities – Continue to be a reliable center of Jewish activities and enhance the programs to encourage more participation.
3. Programming – Strengthen and expand activities that attract members and non-members to the Temple building and to participate in Temple functions.
4. Our Physical Structure – Remodel our facility to make it an attractive and useable space for social gatherings and Community activities.
5. Financial Matters – Develop and adopt a new non-mandatory support program for operational expenses and conduct a major capital campaign for remodeling.

The report describes each category in detail, and we look forward to discussing them with the Board and the congregation. We hope the Board will decide to proceed with the plan at their first meeting after the annual Congregational meeting next month.

1. Marketing and Membership

Since its inception, the key goal of our Temple has been to serve the Ojai Jewish Community. The Community includes anyone associated with Ojai who is Jewish, has an affinity for Jewish people and/or is interested in Jewish--related events. It certainly includes current Temple members, but it is much larger than that. We need to find ways to identify, grow and encourage the full Community. The committee believes that if our recommendations are implemented, participation in and by the Community will increase significantly.

Identifying the Community

The best current definition of the Ojai Jewish Community is our mailing list. We recommend that a committee be formed to validate, update, and enhance that list. This group of “people who know people” could augment this list of 210 email addresses that receive Temple news with recipients’ names, physical addresses, phone numbers and other pertinent information. They could also solicit names of others not yet on our list.

Positioning the Temple

Our Temple should, through its name, be easily recognized as representing the Jewish Community. Our official name, *K’hilat Ha’Aloneem*, is a lovely sentiment, but many people stumble over it. The English name, *Jewish Community of the Oaks*, is much more accessible, but, like the Hebrew name, does not “roll off the tongue.” Something as simple as *Ojai Temple* (from our web site) would seem better. Unfortunately, this name omits our role in the community and the word “temple” is frequently used by non-- Jewish organizations. We want a short name that more clearly indicates our dual role as a Jewish religious organization and a community center. We recommend using *The Jewish Community of Ojai* (or JCO for short).

Growing the Community

We want the Jewish Community to be more visible, both for current residents and for new arrivals. We could start by creating and distributing a publication that describes the Community and its activities and by making our web site easier to find. We can publicize Temple and Community activities with appropriate posters and ads in local publications and utilize social media more effectively. Local real estate agents can be equipped and encouraged to inform potential Community members that we are here and would gladly welcome them. We would need to provide appropriate literature and contact information.

We can extend the implied geographical limits of the Community. This could include an aggressive program to identify Jews in the Ojai Valley and beyond who might wish to associate with us. We should reach out to unaffiliated Jews throughout Ventura County, perhaps working with the Jewish Federation of Ventura County. In addition, it would be good to build links with established Jewish institutions including synagogues in Ventura and Santa Barbara and with Camp Ramah that is here in Ojai.

To help energize our Community, all Temple events can be made available to the entire Community. We can work more closely with the Federation and the other synagogues to

develop a common calendar and effective emails so things like the Klezmer concert, our Jewish film screenings and Nomi Morris's lectures are more broadly publicized.

Growing the Temple

We can be much more active at increasing our membership. A voluntary support structure would remove all financial barriers to joining and would help to bring in new members. As described in the Financial Matters section, we recommend such a program. Sources for potential new members include new arrivals, prior members, our enhanced Community list, and names from our marketing activities. Once identified, these people can be personally invited to at least two Temple events, one of which should be a dinner in a private home with other Temple members present.

We should encourage all current members to greet strangers at the Temple and at Temple events, to welcome them and to introduce them to other members. We can demonstrate our openness by wearing name tags at all Temple activities and by collecting names and email addresses. Although we will be pleased to welcome all new members, we should actively look for families with children. We suggest that the Board name a Membership & Marketing Chair who will lead the congregation to identify, recruit, and involve new members.

2. Religious and Educational Activities

A Jewish religious organization has two core purposes: to provide a place and a minyan for regular Shabbat and holiday observances and to further Jewish education. Our Temple has been active in both areas, and most of our recommendations are to continue or expand things that have been effective. We also suggest trying activities that have the potential to be effective.

Rabbinical Leadership

At times in its history, the Temple has been able to employ a full-time rabbi who played a significant leadership role. More recently, financial constraints have limited us to a part-time rabbi. We have learned to make good use of Rabbi Michael Lotker's excellent skills, capabilities, and availability, and he has become an invaluable part of our congregation. Going forward, we hope the congregation will grow to the point where it can, once again, support a full-time rabbi. One strong step toward that point will be our ability to provide rabbinical coverage for all Friday night services. Until that day arrives, we will continue to depend on our congregants to fill in when professional spiritual leadership is not available.

Religious Activities

Since its inception, our congregation has embraced a broad range of Jewish religious practice. This is a good choice for a small Community like ours, and we think it should continue. We believe that our programs can be strengthened as follows:

- Continue to offer weekly Shabbat services at 6:00 PM that welcome both Community members and guests. Explore different "methods of practice" to find the most attractive combination for our Community. Develop a creative, dynamic experience unique to Ojai and that will give people a reason to attend. The

“method of the week” could be advertised in our weekly email and reactions could be gathered at each week’s *oneg*. As examples, we could try:

- A more classic mostly English service, perhaps using the old Union Prayer book and period music.
 - A topic--driven service where the Rabbi does a short summary and guides an inclusive discussion with questions, opinions, ideas, and interaction.
 - A “music mostly” service (with musicians if possible or pre--recorded songs if necessary) that highlights a particular genre of Jewish music.
 - A Torah--driven service where we delve into the weekly portion and discuss its relevance to our world,
 - A “this is my Jewish story” service where a congregant gives a short talk about how he or she responds to his or her own Jewishness.
 - A Saturday morning service and/or Torah study session.
 - Other ideas that may be suggested by congregants or that have worked elsewhere.
- Encourage the social side of services. The informal practice of dinner after services has worked well, and there are other ways to promote interaction, including:
 - Include a “good news” moment during the service where attendees share stories about good things that had happened during the week. This might be at the start of services and be followed by a *Shehecheyanu* when appropriate.
 - Invite all attendees to join for “Dutch treat” dinner at a moderately priced restaurant after services as part of the announcements.
 - Hold a Potluck dinner after the services at the Temple (in the soon-to-be-renovated gathering space).
 - Do a more substantive *oneg* (perhaps wine and cheese or deli sandwiches) that would serve as dinner.
 - Continue to offer ticket--free High Holy Day services that welcome the whole Community. This serves our dual role. Also, the names and email addresses of non--members that are collected can be used for immediate follow up.
 - Leverage growing interest in and local appropriateness of *Tu Bishvat* to create an annual Community event. This can be promoted as the Jewish approach to environmentalism.
 - Consider a public reading of names to commemorate the Holocaust, possibly involving local High School students.

Education

As a result of our Community demographic, our education program is appropriately skewed toward adults. We have not ignored our obligation to educate younger people, but our activities here have been limited. We recommend that the Temple commit to strengthening both.

- Make a clear commitment that the Temple will continue to assure the full range of education for children of members. This would include Hebrew training and *Bar/ Bat Mitzvah* preparation.

- Identify and arrange for other youth activities, perhaps in collaboration with other neighboring synagogues and (maybe) Camp Ramah.
- Continue and, if possible, expand the Rabbi--led adult education sessions.
- Utilize expertise of our own members to explore topics of interest to our membership.

3. Programming

The Temple connects to its members, the Jewish Community and to the broader Ojai community through its activities.

Continuing Activities

We already have in place a good set of activities that we can enhance and augment. These include:

- The regular monthly movie screenings of films with Jewish interest should continue and be enhanced by more aggressive marketing.
- The Hanukah party at the Ojai Valley Inn is a well--attended event, and the Temple's support for it can be made more visible.
- The Community Passover Seder is an excellent example of serving the Community, but it would be even better if it could be held in the Temple.
- Continue to identify and lend visible Temple support to Ojai events with a Jewish character, such as the recent *Fiddler on the Roof* production.

Non--Religious Programming

We recommend that the Temple have a program at least once every four to six weeks that is not related to a Jewish Holiday. Such programs could be purely social events for the Community and might include:

- A Bingo night
- Men's (or mixed) poker night (with reasonably low betting limits)
- Musical performances
- Speakers and/or performers
- Parties for events of broad interest like the Oscars, Super Bowl or Final Four. The purpose of these events would be to promote community. They might be funded with break--even admission fees or underwritten by contributions rather than being used as fund raisers. Program chairs would be responsible for developing quality events, obtaining leaders to run the events, and approaching members and others for ideas.

We can also get fresh ideas from other Temples about programs that have been successful for them. We could identify a speaker or musician that others have used or an idea for a program that is creative or interesting.

Social Action

Jews express their concern for others through the *mitzvah* of *tikun olam* ("repairing the world"). Collective action on issues of social importance improves its impact and strengthens our Community. On some issues, such as those affecting Jews and Israel, the congregation can make public statements that advocate our position. On others,

including those that threaten the Ojai way of life, we need to join with others in the broader Ojai community. Perhaps the congregation will want to adopt one or two issues of broad concern (such as the environment, a disease, local hunger, education, homelessness, or something else) as a central focus of our efforts.

To be sure the Jewish view of key issues is part of the public dialogue. We could submit Op Ed pieces to the Ojai Valley News and/or the Ventura County Star. For example, we could comment on the (unfortunately) growing support for "divestment and boycott" of goods, services, and general economic trade with Israel. Without an articulate response, the non-Jewish community may be misled and our voice will be unheard.

Other Religious Organizations

The Temple can reassert its role as part of the broader Ojai religious community. We could, for example, join with other congregations on a shared worship service for Thanksgiving. We could hold the service on Thanksgiving eve, leaving the holiday itself for usual activities.

We could also help our non-Jewish neighbors understand who we are and what we are about. Rabbi Lotker's class on the three great Abrahamic religions has attracted a good cross-section of the broader community. If we reactivate our participation in the Ojai Ministerial Association, we could build links with lay and spiritual leaders of other faiths. Together, we could work on addressing issues of mutual concern, especially as they relate to *tikun olam*.

4. Our Physical Structure

Currently our building is significantly under-developed and under-utilized. We strongly feel that, without a proper space for our Community to gather, our overall plan will not succeed. Previous attempts to increase membership or participation have fallen short. We believe one of the primary reasons for failure was the lack of an appropriate *gathering place*. A well-utilized, attractive physical structure would be a constant reminder to us and to the public that the Ojai Jewish Community is an active and vibrant element of the Ojai Valley.

The Role of our Building

A key issue for the Temple is that our building is unused, unattractive, dark, and empty more than 90% of the time. It is not fulfilling its role as the physical manifestation of the Ojai Jewish Community. The primary reason is that, except for the sanctuary, the building currently has no suitable place for people to gather, to come together, to visit, to get to know each other better, to socialize, to be entertained, to be in a communal place that simply feels good. With a proper remodeling, our home can be vibrant and active.

The building will come alive. More people will come to and enjoy being in the building. It will become the home of the Ojai Jewish Community that it was intended to be.

The Gathering Place

We propose that the "social hall" be created from a series of 6 existing small rooms to one large *gathering place*. With such a large room, we could hold our Passover Seder in

our own “home” rather than having this key Community event elsewhere. The committee has investigated the possible design, implementation, and cost of such a transformation. A remodeled building (with the use of a tent outside) could comfortably seat over 120 people for a sit--down meal. When not set for a large event, the room could accommodate *pods* including a lounge, a classroom area, and a proper conference table for meetings.

The overall “social hall” building is 1,260 square feet, but the current "public" area is barely 400 square feet. We have a design that would provide 1,030 square feet of open space for multiple purposes plus an open serving kitchen and a handicap accessible bathroom. Appropriate furnishings (tables, chairs, lounges) and fixtures (kitchen appliances, cabinets, and buffet counter) would also be provided. The design includes 2 pairs of doors that are 8’ by 8’ and link the multi--purpose space to the parking lot, allowing larger events to expand into a tent when these doors are fully open. We have reviewed this design with Ventura County, and we are confident that appropriate permits can be obtained. We also have preliminary cost estimates and have included these in our financial planning.

The Sanctuary

As part of an overall project, we would make several improvements in our Sanctuary building. These could include:

- Beautify the *bimah* including new & renewed furniture; enhanced & additional art, and improved & efficient lighting.
- Renovate and redecorate the entry foyer to be consistent with the sanctuary.
- Renovate the second-floor room over the entry lobby to serve as a Rabbi’s study/conference room/library.
- Alternatively, the above could be substituted for the “crying room” at the rear of the sanctuary.
- Remove the unused baptismal font (aka the *mikvah*) behind the stained glass.
- Fully renovate the two existing bathrooms

Crown all of this with a curated art program to assure coordination and quality.

The Kitchen

The degree of “kosher--ness” is a perennial issue for all synagogues with kitchens. Our current kitchen is supposed to be strictly vegetarian, but this rule is not followed rigorously. The planned kitchen facility is designed more for serving than for cooking and food preparation. Hence, it should be possible for a kosher caterer to serve a kosher meal even if non-- kosher food has been served at other events. The committee feels that we will make better use of the facility with minimum restrictions on food, though we suggest that the Board consider specifying that no pork or shellfish be served.

The Project

A remodeling project could proceed in the following steps, some of which have been completed to develop reliable information for the Board and congregation:

1. Prepare proposed design including cost estimate – *complete*
2. Obtain preliminary approval from Ventura County – *complete*
3. Refine design and develop renderings – *complete*
4. Work with Board to stabilize proposed design – *beginning now*
5. Obtain permission to solicit indications of major gifts – *at the Board meeting*

6. Recruit Challenge Gift benefactors – *Following Board meeting*
7. Gather input from & secure approval by congregation – *at annual meeting*
8. Begin formal fund raising – *after congregational approval*
9. Form a Building Committee – *including major donors and interested members*
10. Create final construction drawings – *after congregational approval*
11. Obtain formal approval from the County – *after drawings are complete*
12. Solicit bids and select the contractor – *after fund raising has succeeded*
13. Begin construction – *as soon as possible after the High Holy Days*

5. Financial Matters

This report follows the dictum: “The money comes last.” It is not that money does not matter; indeed, it matters very much. However, unless the institution’s activities are of value, there will not be money for them; if they are of value, the money will follow.

Operating Expenses

Rather than continue our classic dues program, we suggest adopting a voluntary support structure. With such a program, members would select an appropriate support level (a fraction or multiple of the projected per--member operating cost) based on their financial situation and desire to support the Temple. They would be encouraged, but not required, to support the Temple at a level consistent with their financial capabilities. This would even allow members to join and remain members without paying anything. Similar programs have succeeded at other synagogues and are the common way churches are supported.

Capital Campaign

The building project would be paid for with a capital campaign that covers (through multi--year pledges if necessary) the full cost of remodeling and furnishings. The campaign would proceed in two phases. Initially, commitments would be sought from those capable of seminal gifts to create a *challenge fund*. After the congregation approves the project, the formal phase would continue for the balance. The fund-raising goal will include the total cost to renovate and equip the Social Hall building and rejuvenate the sanctuary. This includes new tables and chairs, lighting, appliances, air conditioning, the Rabbi's Study, enhanced parking, etc. The plan will include appropriate dedicatory opportunities. The goal will be determined before the formal phase begins.

Building Rentals

The Temple can develop a program to encourage building use by others both for financial rewards and to assure the vitality of the organization. With the completion of the renovation, our facility will be an attractive venue for functions and events such as:

- *Bar/Bat Mitzvah* and wedding receptions
- Other social events
- Meetings of clubs and organizations
- Other activities such as exhibits, workshops and neighborhood meetings

To comply with legal requirements, food service would be available only from approved food providers, and income would be dedicated to supporting the Temple.

Implementation

Our Mission Statement calls for a “comprehensive strategic plan”, and we are determined to make that plan succeed. We know that to build an active Jewish Community many things need to be accomplished, many steps need to be taken, and many people need to be involved. With well--defined plans and enough committed volunteers to implement these plans, we will succeed. The key is to have individuals who accept responsibility for each element of the plan. Therefore, for each of the five categories that we recommend, we have secured agreement from one or more members to accept responsibility for it if asked to do so by the Board.

The committee is pleased to present this report to the Board. Jerry Kaplan initiated this effort at last year’s Congregational meeting, and the committee has dedicated considerable time and effort to creating this report. We are thankful to the many people who provided input and especially to Rabbi Lotker for his help. We look forward to discussing it with you on April 21st when we will welcome your questions and comments.

Also, we hope you will authorize us to solicit support indications from selected congregants. Our goal is to present these ideas at this year’s congregational meeting along with your endorsement and indications of financial support. Of course, the decision on whether to proceed with the plan rests with the Board and the congregation. We suggest that that decision be made at the first Board meeting following the Congregational meeting.