



**TEMPLE ADAT ELOHIM**

your place to learn...grow...connect...

## *Long-Range Strategic Plan*

*Temple Adat Elohim is a dynamic  
Reform Jewish community of  
life-long learning, spiritual growth and connection.*

Updated August 18, 2008

**Kadima**  
*Moving Tradition Forward*

# Contents

<b>Contents</b> .....	<b>2</b>
<b>I Introduction from Temple Adat Elohim Leaders</b> .....	<b>3</b>
<b>II TAE Vision, Mission and Values</b> .....	<b>4</b>
<b>III Past, Present, and Future: The Strategic Planning Process</b> .....	<b>5</b>
<b>IV TAE: Strengths and Opportunities</b> .....	<b>7</b>
<b>V Six Strategic Imperatives</b> .....	<b>9</b>
Overview.....	9
1) Strategic Imperative: Community.....	10
2) Strategic Imperative: Worship.....	10
3) Strategic Imperative: Life-long Learning .....	11
4) Strategic Imperative: Financials.....	11
5) Strategic Imperative: Infrastructure.....	12
6) Strategic Imperative: Communications .....	12
<b>VI Strategic Action Plan</b> .....	<b>13</b>
<b>VII Financial Projects</b> .....	<b>14</b>
<b>VIII Appendices</b> .....	<b>15</b>
1) Key Participants in the Process .....	15
2) Glossary .....	17
3) Addendums: .....	17
4) Demographic Data.....	17
5) Survey response summary .....	17
6) Focus group summary and URJ recommendations.....	17

## I Introduction from Temple Adat Elohim Leaders

Dear Congregants,

TAE was founded forty years ago and we enjoy many great traditions. Moving those traditions forward for generations to come is the ultimate goal of the strategic planning process, and why we've named this effort *Kadima* (*forward*).

Translated from Hebrew, Adat Elohim means "Community of God". This means different things to different people. For some it is a place to come for a meaningful spiritual experience. For others it means being a center for life-long learning. Healing the world (*Tikkun Olam*) with other Reform Jews may embody a community of God to some or it could simply be a place to form friendships for yourself and your children.

We are thankful to the *Kadima* committee for their guidance, but please recognize that YOU are the authors of this plan. All Temple members were invited to participate, and 400 people completed on-line surveys, providing more than 2000 question responses. Over 150 people attended various focus groups or the Town Hall meeting, providing valuable opinions and dialogue on TAE's strengths, challenges and opportunities. This strategic plan embodies your collective vision and input for embracing and strengthening Temple Adat Elohim.

This plan will help us focus on those key initiatives and efforts that are needed to build TAE for the future. The following document includes everything from the "big picture" strategies to six strategic areas to detailed action plans, complete with names, dates, and clear expectations. We are excited about the goals and ideas you have put forth for *enriching Jewish life-long learning, embracing and encouraging spiritual growth, and creating a joyful and fulfilling community where we come together to heal the world*. We look forward to fulfilling these opportunities with *financial health, effective communications and a high-functioning organizational infrastructure*.

We believe that together we will create a community that lives up to our name in every sense of the word. Please join us! We encourage you to attend services, take a class, volunteer your time, contribute or just reach out and make a friend. We invite you to participate in realizing the vision of being the progressive Reform Jewish center for life-long learning, spiritual growth, and connection. Together we will move our rich traditions *forward* to form a place that is relevant for generations to come.

L'Shalom,

Rabbi Ted Riter  
TAE Senior Rabbi

Ken Elman  
TAE President

## II TAE Vision, Mission and Values

### **Mission:**

Temple Adat Elohim is a welcoming and fulfilling Jewish community embracing those who seek spirituality, knowledge, and a desire to heal the world.

### **Vision:**

To be a dynamic Reform Jewish community of life-long learning, spiritual growth, and connection.

### **We value:**

***Klal Yisrael*** - The Jewish Community

***Kavanah*** -- Intentional Living

***Talmud Torah*** - Life-long Learning

***Tikkun Olam*** - Repairing the World

***T'fillah*** – Prayer

***M'dinat Yisrael*** – The State of Israel

***Klal Yisrael* - The Jewish Community:** We welcome all who are interested in joining our community. We were raised in different Jewish denominations and we were raised without affiliation. We were raised in other faith communities and we were raised without religious participation. We have chosen Judaism and we have chosen Jewish loved ones. We are married, single and widowed, in interfaith and interracial relationships. We are all ages, abilities, and orientations. We are together now in one congregation, one extended family. We offer support in times of need, joy in times of celebration, and at all times trust, friendship and community.

***Kavanah* -- Intentional living:** We believe that Reform Judaism requires a life of intention; one in which we purposefully grow as individuals and as a community. We honor our modern and ancient ancestors by seriously engaging in our traditions, our practices, and our community. We understand that life has purpose and meaning when we continue to evolve in our life's Jewish journey.

***Talmud Torah* - Life-long learning:** We believe that Jewish education begins at the earliest age and continues throughout our lives. Learning is an on-going, interactive activity in which we are all both teachers and students. Our sacred texts and history lay a foundation for our study as we individually build upon the wisdom of ancient times. Torah, and all that it encompasses, is our tree of life and we continue to nurture its growth for future generations.

***Tikkun Olam* - Repairing the World:** We bring *shalom* (peace) and *shalem* (wholeness) to the world. We work to end injustice and hatred by educating ourselves and our friends, by speaking out against wrongs, and by shaping our words and prayers into reality. We are committed to the improvement of our environment and to sustaining each other. We care for those closest to us and extend our arms and voices to support others. We see our efforts as a sacred obligation - a partnership with God.

***T'fillah* – Prayer:** We nourish our hearts and souls through personal and communal prayer. We believe that prayer has the power to unite us, give us strength, and console us. We illuminate paths for personal spiritual journeys and we create sacred time and space for marking holy days and life cycle events.

***M'dinat Yisrael* – The State of Israel:** We show our love and support for Israel by educating ourselves about her history and culture, advocating for her rights, and praying for her peace. We are committed to visiting Israel, promoting full civil, human and religious rights for all her inhabitants and strengthening Progressive Judaism in Israel.

### **III Past, Present, and Future: The Strategic Planning Process**

Temple Adat Elohim was founded more than 40 years ago by a small group of Reform Jews residing in the Thousand Oaks area. From this nucleus of 16 families, TAE has grown to one of the leading synagogues in the Greater Los Angeles area with well over 600 families.

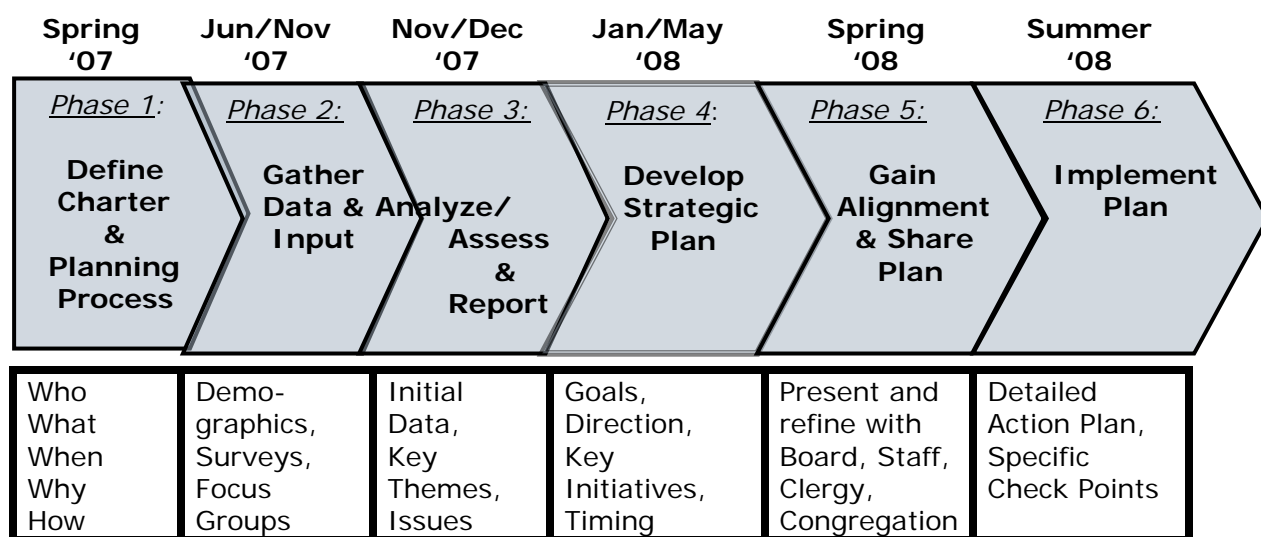
While TAE has had previous strategic planning efforts, none approached the scope or intensity of this project. The roots of Kadima can be traced to the rabbinical transition that occurred in 2005 as TAE began the search for Rabbi Greenbaum's successor. Many questions were raised about the desired future of TAE, as this was pertinent to the selection process. The selection committee conducted numerous discussions and focus groups to hone in on the specific talents and capabilities required of the new rabbi. It became obvious that in the midst of TAE's growth (from its roots as a small rural synagogue to now being the largest congregation between Los Angeles and San Francisco) that numerous congregational needs were not being fully satisfied. A number of changes were implemented, and there was more to be done. Rabbi Riter arrived in July 2005, and further enhancements continued. The Kadima committee was launched in 2007 to map out and lead the congregation in a formal strategic planning process. The desired outcome is a long-range plan to help guide the future growth and development of the TAE community.

*The Goal:* To create a comprehensive plan that will illuminate the path for TAE to realize the vision of the congregation and to create a place that is relevant throughout our congregants' lives.

*The Approach:* To use an "inclusive" process, tapping into the collective wisdom and wishes of the entire congregation, staff, and clergy. Share results and progress throughout the process to build confidence and ensure alignment.

*Kadima's Pledge:* The Kadima committee strives to be highly professional and thorough. We commit to faithfully represent the genuine needs and views of the TAE congregation. Further, we will oversee the planning process through implementation to ensure that these efforts result in real positive impacts for the TAE congregation.

Overview of Strategic Planning Process



Key phases involving the congregation:

**Phase 2: Gathering Data and Input:** this involved the entire TAE community, as this was the crucial step to gather congregational input as to the desired future direction for TAE. It was an extensive effort over five months to carefully listen to needs, wants, and hopes of the congregation.

Numerous demographic surveys and data analyses	On-line congregant survey with 400 responses	15 focus groups with 135 participants	Town Hall meeting with 45 participants	Interviews and meetings to process & understand	Review findings with key leadership
--	--	---------------------------------------	--	---	-------------------------------------

**Phase 4: Developing the Strategic Plan:** this was the most difficult portion of the process, as it involved condensing all of the findings and perspectives into a comprehensive yet realistic strategy and plan. This was accomplished through a collaborative effort with the Executive Committee, Senior Staff and the Board to consolidate congregational input. The output helped create a roadmap to the future...to move the community *“forward”*.

Direction: agree on Mission / Vision / Values	Choices: identify / discuss / align on key issues	Potentials: create initiatives to achieve goals	Choices: agree on key initiatives and plans	The Work: roles / responsibilities / timing	Formalize into a strategic plan
---	---	---	---	---	---------------------------------

## IV TAE: Strengths and Opportunities

Temple Adat Elohim serves the greater Conejo Valley as a vibrant source of strength, leadership and Tikkun Olam. Our Strategic Plan focuses on maximizing our strengths, repairing our weaknesses and it builds upon the great traditions that our 16 founding families started more than 40 years ago.

While this plan primarily deals with the challenges our Congregation faces over the next decade, it does so by taking into account our many strengths including:

- A diverse membership of well over 600 families, making Adat Elohim the largest synagogue between Los Angeles and San Francisco.
- Congregants who care deeply about the temple, as demonstrated by the unprecedented response to the survey and focus groups.
- An award winning Early Child Education Center, serving approximately 145 pre-school aged children and 50 toddlers in the parenting center.
- A Religious School program with over 450 students enrolled, and a B'nai Mitzvah program that helps an average of 75 young adults reach B'nai Mitzvah every year and continue their Jewish education through post-confirmation.
- Selection of our Religious School to participate as one of seven temples in the greater LA area in the Re-Imagine program.
- Extensive Adult Education programs.
- Clergy and senior staff who are energetic, passionate and dedicated to making Adat Elohim the progressive Reform Jewish center in the area.
- A congregation deeply committed to *Tikkun Olam* (Healing the World).
- Talented and resourceful congregants
- Active auxiliary groups with participation of over 700 members, including the Mishpaha, Brotherhood, Sisterhood and The Greatest Generation.
- Energetic support for positive change, as evidenced by the enthusiastic responses, comments, and focus group discussions.

And while we recognize that our Temple is built upon a rich tradition of excellence, we also recognize the challenges we face:

- The demographics and economics of the area have changed over our history. The Conejo Valley has transformed into a prosperous suburban enclave (resulting in pricier real estate and increased cost-of-living) and the current economy is unstable. TAE may face challenges in attracting new families, which could limit the pool of future leaders, donors, and volunteers.
- As TAE grew in size and evolved in complexity, it has become more of a challenge to maintain a warm and personal environment and to meet the variety of expectations of all congregants, including the management of escalating financial commitments.
- As TAE has grown, it has been a challenge to consistently attract strong leadership and we continue to face organizational challenges that limit our effectiveness.

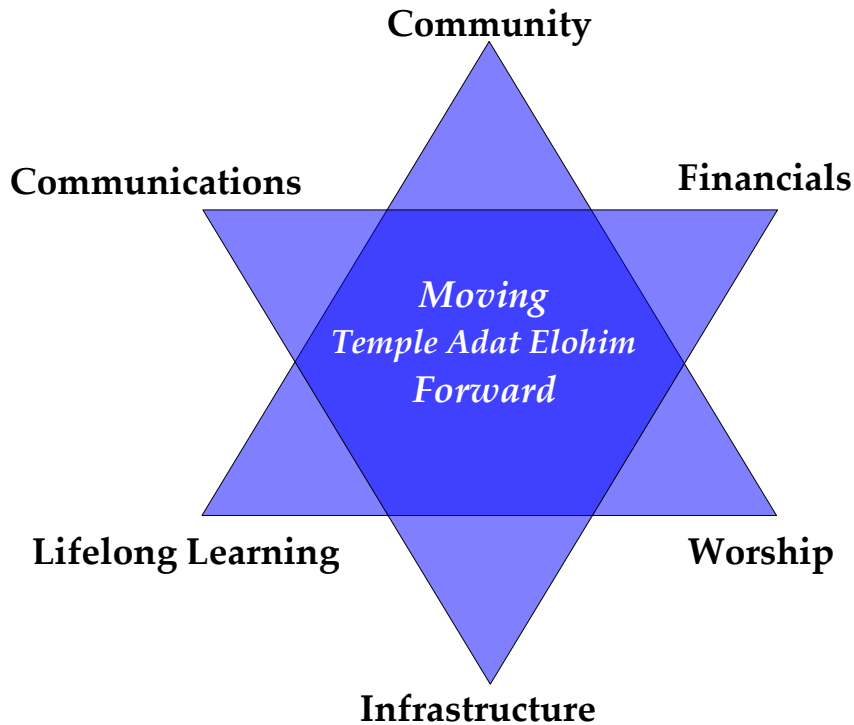
- The young adults of the “Millennium” Generation have unprecedented pressures to succeed in today’s world, resulting in competing priorities and time pressures which challenge participation in temple activities.
- We have not budgeted funds to properly maintain, renovate or upgrade the buildings on our property.
- We do not have sufficient space for all of the social, education and religious programs we offer. In addition, there is inadequate parking.
- Many congregants possess only a modest understanding of Temple finances.
- Our congregation has an uneven history of encouraging its members to contribute to various fundraising efforts. Few see Adat Elohim as an important philanthropic destination. We have not cultivated a “Culture of Giving” within our congregation.
- TAE has not consistently inspired a spirit of ownership amongst its congregants.
- We have only recently begun to keep pace with the evolution of Reform Judaism.
- While life-long learning is a key aspect of Adat Elohim’s vision and values, we have not dedicated the resources to consistently and effectively offer programming that permeates all aspects of temple life, nor serves the needs of all age groups.
- We have not leveraged recent improvements in various technologies to aid our efforts to communicate internally and with congregants.

## V Six Strategic Imperatives

### Overview

Many different efforts and initiatives have been identified that are required for TAE to attain its vision. As these efforts were documented and collected, it became clear that they could be grouped into six key areas (termed “imperatives”) to help organize the entire plan.

The first set of imperatives is focused on serving congregant needs, notably Community, Worship, and Lifelong Learning. The second set of imperatives is focused on how the “business” of TAE is conducted, specifically our Financials, Operational Infrastructure and Communications.



## 1) Strategic Imperative: Community

TAE was conceived to be a place of community. TAE seeks to be an essential part of congregants' lives. The collective community of TAE provides for the needs, wants, and multifaceted interests of its members. The congregants and participants at TAE are seeking personal connections, to be known and to be a part of a warm and welcoming group.

**Strategy:** TAE is a joyful and fulfilling choice in Congregants lives where we connect as a caring and spiritual community and participate in the healing of the world.

### **Key Initiatives**

- 1) Develop a Membership Plan that will support membership growth to 700 families.
- 2) Establish an Ambassador Program that will strengthen members' personal connections and foster retention.
- 3) Create focused programming to reach and appeal to a broad audience.
- 4) Evaluate Social Action efforts and infrastructure to ensure continued success.
- 5) Outreach Program (tbd)

## 2) Strategic Imperative: Worship

At its core, TAE is a place of worship for Reform Jews. In today's complex, fast-paced, ever-changing world, many Jews look to their synagogue for consistent values and precepts, traditions, and guidance on navigating life. The Reform Jewish movement continues to evolve in order to meet the complicated needs of Reform Jews around the world. TAE is also evolving to support the diverse spiritual and religious needs and expectations of our congregants, while staying current with the direction of the Reform movement.

**Strategy:** TAE enables and embraces spiritual growth for all congregants.

### **Key Initiatives**

- 1) Establish clear and consistent (religious practices) policies that continuously evolve to ensure consistency with the direction of the Reform Jewish Movement.
- 2) Develop effective religious practice orientation/education processes for new (and existing) members.
- 3) Develop additional experiences to support congregants with their spiritual explorations.
- 4) Define and clarify role and expectations of Religious Practices Committee.

### **3) Strategic Imperative: Life-long Learning**

One of Adat Elohim's core values is its commitment to a lifetime of Jewish learning. The Torah teaches us that we are never finished learning. The continued striving for knowledge and understanding, no matter where we are in our lives, provides opportunities for personal growth and comfort. Learning can be a unifying experience as people come together to seek inspiration and knowledge. We strengthen our synagogue community through learning that includes all ages and levels of education.

**Strategy:** TAE is a recognized leader in enriching Jewish life through its life-long learning programs.

#### **Key Initiatives**

- 1) Develop and implement the "Re-Imagine" program for our K-7<sup>th</sup> grade Religious School.
- 2) Create a Jewish Learning Board (JLB) to integrate ECC, RS, Youth, Adult and Family Education programs.
- 3) Develop Life-long Learning programs to provide a cohesive and continuous set of learning experiences that will satisfy the majority needs of the congregation and the diverse levels of Judaic knowledge represented in our community.
- 4) Attract, support and recognize the very best educational staff and lay instructors.

### **4) Strategic Imperative: Financials**

There is no escaping the financial realities of managing a large and diverse organization such as TAE. This involves both the short-term requirements (i.e. meet budgets, payrolls, and other day-to-day needs), and the longer-range needs (i.e. fund development strategies, debt management, financial reserves, endowments, etc.). Both aspects are required to enable TAE to meet the full range of community needs now and in the future.

**Strategy:** TAE enjoys financial stability and is poised for long-term financial health.

#### **Key Initiatives – Fund Development**

- 1) Develop and foster a "Culture of Giving" at TAE.
- 2) Create a coordinated giving program to raise a minimum 10% of annual expenses each year.
- 3) Empower an ongoing development committee to create and foster ownership for meeting our fund-raising goals.
- 4) Evaluate and leverage the potential contributions of the Pillar Group.
- 5) Align on and implement a debt reduction plan.
- 6) Implement a plan to create an endowment to provide for future financial support.

## **Key Initiatives – Budget Planning**

- 1) Create greater transparency in the annual budget process and resulting plan.
- 2) Develop long range financial plans that enable TAE to adhere to a balanced annual financial budget that includes reserves and achieves long-term financial stability.

### **5) Strategic Imperative: Infrastructure**

With limited resources of time and money, we need to regularly evaluate our organizational design and systems to ensure that TAE is efficient and appropriately staffed to meet the needs of the congregation. We need to continue to attract and develop lay leaders for various leadership positions. Our facilities need to be properly maintained and kept attractive. We need to stay current in our use of technology to ensure smooth processes, effective communications, and reliable data.

**Strategy:** TAE is organized effectively to fulfill our long-range plan and to meet the service needs and expectations of our congregants.

#### **Key Initiatives**

- 1) Review current organizational structure of Exec, Board, Committees and Staff to optimize operational effectiveness and to clarify accountabilities.
- 2) Form leadership and oversight task forces/committees to insure key focus areas are optimized for success.
- 3) Manage towards the future through a solid succession planning process and innovative leadership development opportunities.
- 4) Improve and maintain the physical facilities.
- 5) Streamline registration and membership processes and insure data integrity.
- 6) Leverage modern technologies to enhance operations and communications.

### **6) Strategic Imperative: Communications**

Communication is crucial to ensuring the effectiveness of the various linkages of the collective TAE community. In order to maximize the many great programs and services TAE offers, streamlined, clear, current and consistent communication is essential.

**Strategy:** TAE communicates effectively.

#### **Key Initiatives:**

- 1) Develop an effective external marketing plan (to include public relations) that draws people to TAE.
- 2) Develop an effective internal marketing plan that powerfully informs our community of the great opportunities we have to learn, grow and connect.
- 3) Personalize communications and interactions within TAE.

## VI Strategic Action Plans

Detailed action plans have been developed for each of the above Strategic Initiatives. These action plans are now owned by the Executive Committee member, Sr. Staff partner and applicable Committee Chair to move these initiatives forward. The Kadima committee will serve as coaches in this process. Coaches have been assigned to each of the strategic areas as follows:

<b>Strategic Area</b>	<b>Kadima Coach</b>
Community	Rebecca Miller
Worship	Allen Rosen
Life-Long Learning	Christy Rosen
Finance	Cindy Mendelsohn
Infrastructure	Joel Miller
Communications	Howard Weisenfeld

## **VII Financial Projections: work in process**

## VIII Appendices

### 1) Key Participants in the Process

**The Kadima committee:** The committee was formed in winter of 2007. Each member was hand- selected based on experience with long-range planning and knowledge of TAE's culture and operational processes. The committee is chaired by Rebecca S. Miller (January 2007-July 2008).

#### Committee Members:

**Cindy Mendelsohn** – Cindy has over twenty years of strategic planning and financial management experience. She has directed strategic planning for key divisions at both NationsBank and Countrywide Financial Corporation. She currently serves as Senior Vice President, Strategic Initiatives at Countrywide Bank. Cindy holds a bachelor of business administration degree in Finance from The College of William and Mary. Cindy and her husband Seth moved here from Orange County in 2006 and their daughter, Maddy, is at the ECC and will be in TK this fall.

**Joel A. Miller** – Joel is an experienced corporate Human Resource executive and strategist and has led the Strategy function in several corporations. He is currently Chief Human Resources Officer at Newegg.com, a large e-commerce company. Joel has been fortunate to live in many different locations and has a broad perspective of Reform Synagogues around the country. Joel is a graduate of Rensselaer Polytechnic Institute, where he earned his Bachelor of Science degree in Management Engineering. Joel currently serves as the Chair of the Kadima Committee and sits on the TAE Board of Directors.

**Rebecca S. Miller** – Rebecca has extensive planning and programming experience in both the corporate and non-profit sectors. Most recently she was the President and CEO of an international non-profit organization serving children in highly vulnerable situations around the world. Rebecca is a graduate of the "Next Generation Leadership" fellowship program through NYU's Robert F. Wagner graduate school of public service. Rebecca, Joel and their daughters Anna (2<sup>nd</sup> grade RS) and Molly (ECC) joined TAE in May of 2006 upon moving to the area from Seattle. Rebecca served as the Chair of Kadima last year, leading much of the effort to build this plan. She currently serves as the TAE Vice President of Ways and Means (Development) and is a member of the TAE Executive Committee and Board of Directors.

**Christy Rosen** - Christy has extensive experience in fundraising, sales, marketing and communications. During her most recent professional role, Christy helped bring a new pharmaceutical product to market. Much of that preparation included building a strategic plan for a nationwide sales force. Christy is a graduate of Hastings College, where she led the Broncos to finish seventh in the nation in forensics...placing fourth in the nation in persuasive speaking. Christy and her husband Howard have been an active part of the TAE Community since 2005. Their son Nate graduated from the ECC this spring and their youngest, Drew, will be starting in the fall. Christy serves as the Mishpaha President for the 2008-09 school year and sits on the TAE Board of Directors.

**Allen Rosen** – Allen has lived in the Conejo Valley for the past 12 years. He has an extensive background in technology, particularly in the development and implementation of strategic technology plans for fortune 100 companies. Allen has a Bachelors' degree from UCLA and an MBA from Cal State Northridge. Allen lives in Oak Park with his wife, Jan and three ECC Graduates, Joshua, Benjamin and Daniel.

♥**Rita Steinberg, of blessed memory** – Rita was an active ambassador and volunteer of TAE since she joined here with her husband Stanley 6 years ago. After serving as President of sisterhood and as their programming chair, Rita participated with Kadima for a year before she was elected as the incoming Vice President of Membership of TAE. Rita brought a broad and deep understanding of the TAE culture and community to the planning process and her insights and perspectives were highly valued. Most importantly, she brought her heart and spirit to the Kadima team and to this strategic plan, as she has so generously done with everyone she touched in our community.

**Howard R. Weisenfeld** – Howard is an LA native and has been an active member of the Jewish Federation of Los Angeles most of his adult life. After graduating from UCLA, he started his business career in the import trade and has spent the last 20 years running a property management / development business. He brings a unique perspective to the planning process with an in-depth understanding of the facilities and logistical considerations of TAE operations. Howard, his wife Melanie and children joined TAE four years ago when they moved to the area from Venice. His daughter Allison (RS 4<sup>th</sup> grade) and his son Jason (RS 2<sup>nd</sup> grade) are both ECC graduates. Howard serves as the Chair of the TAE Membership Committee.

**The Kadima Steering Committee:** Early in the process, a steering committee was formed to support and help frame the work of the Kadima committee. Quarterly meetings were held with this Steering Committee comprised of the board and Senior Staff and ongoing communications were handled via calls and email.

**Kadima Steering Committee Members**

Rabbi Ted Riter  
Rabbi Rebecca Dubowe  
Cantor David Shukiar  
Aliza Goland, Executive Director  
Ken Elman, TAE President  
Ken Bock, TAE Immediate Past President  
Jan Iscovich, TAE Executive Vice President  
Gregg Southard, TAE Treasurer  
Karen Persichetti, TAE Secretary until July 2008

**Special Executive Sessions:** Two strategy sessions were conducted with the entire executive committee and senior staff to bring details to the key areas of focus.

**Additional participants included:**

Marcy Goldberg – Religious School Director  
Batsheva Spector – Early Childhood Center Director  
Marilyn Lippel – VP Administration

Stuart Goodman – VP Finance  
Allen Crane – VP Religious Practices

**External Expertise:** URJ Support - Throughout the process, Rabbi Alan Henkin from the Pacific Southwest Conference of the Union for Reform Judaism (URJ) supported the team. He and Rabbi Linda Bertenthal facilitated several of the focus group sessions. Their guidance, experience, and insight has been highly valued and appreciated.

## 2) Glossary

- Alignment – The proper, logical, or expected relation of one thing to another.
- Low Hanging Fruit – Things or Goals that are easily reached or that can be accomplished.
- Mission – A specific or operational task that a person or group of persons is sent to perform.
- Rationale – A statement of reasons. / A reasoned exposition of principles. / The fundamental body of reasons serving to account for something.
- Strategy – A plan, method, or series of maneuvers or stratagems for obtaining a specific goal or result.
- Tactical – Of or pertaining to arrangement or order; characterized by skillful technique or procedure.
- Vision – A vivid imaginative conception or anticipation; the act or power of anticipating that which will or may come to be.

## 3) Addendums: (to be added)

**Demographic Data**

**Survey response summary**

**Focus group summary and URJ recommendations**