

Temple Beth Sholom

Census Survey

Report of Findings

November 9, 2016

Introduction

Rationale:

In the Temple Beth Shalom (TBS) Master Plan, written in 2008, it is stated that Temple Beth Shalom “will be a center where our TBS community can grow Jewishly through engaging worship, innovative education, dynamic programming...” The Mission Statement concludes with the sentence, “We will be a Jewish resource center for a greater community.” There are many programs and activities that are offered to the membership of TBS.

- Is there a current coordinated and focused structured plan of action that addresses the components of the Vision and Mission of TBS on a regular basis?
- Is there a coordinated plan of action based on the current interests of the membership?
- Are there structures of accountability built into long and short term goals?
- Are the goals based on a list of priorities derived from the result of findings?
- How does TBS keep current with the resources and expressed needs of their congregants?
- How does TBS keep current with the organizational management of the Temple?

The most current Master Plan is dated 2008. An organizational Master Plan should be the current working document that guides all decisions being made for the Temple. The Mission Statement is a summary statement of the core belief of the organization and its members. Both the Master Plan and Mission Statement are a result of a clear and inclusive assessment of the entire organization, and should include the input of all members. This would include all members and anyone who is employed within the organization.

A Master Plan should be reviewed at least every 5 years. It can be assumed that the need to review and possibly revise the 2008 Master Plan is overdue. That thought is followed by several important questions based on the idea that a Master Plan cannot be updated without current data. If the Master Plan is not reviewed regularly, activities may not be meeting the needs of its members.

Major areas of inquiry, should not be limited to worship, education and programming. Without multiple methods of eliciting input from the congregants, specific plans may be implemented and not be relevant to the community at large.

The membership of TBS represents a wide variety of skills, resources and talent. Although speakers and programs from outside the community will always be needed, TBS should be connected to the internal resources that already exist within its membership. Above all;

- Does TBS 'know' its membership?
- Is TBS acquainted with the resources of its members?
- Is TBS current with the interests of its members?
- Is TBS transparent with all its policies and activity planning?

These and other questions must be reviewed on a regular basis.

Proposal:

In order to update the Master Plan a survey should be conducted every five (5) years. The survey is intended to yield information that will be useful for planning by leadership groups at TBS, such as the Rabbi, Cantor, governance body, the Board and general organizational management under the direction of the Executive Director. The data will be available to any other organizing group that would find the results useful for planning events and developing strategic plans. The Report of Findings from the survey will be written and placed in a notebook that is accessible to all congregants, as well as be posted on the TBS website. The congregation will then be invited to a PowerPoint presentation to view the results of the survey.

Procedure for Census/Survey Implementation:

- The Executive Director (ED) will select a survey implementation coordinating group of at least three (3) members.
- Establish a project structure, including a meeting schedule for the Coordinators.
- Develop a timeline for implementation.

- Develop a survey.
- Present and seek approval from the Board to conduct the survey.
- Edit survey.
- Distribute the survey via as many resources of communication as possible.
- Gather data.
- Compile data.
- Analyze data.
- Write a Report of Findings which will include recommendations based on the data.
- Prepare a PowerPoint presentation.
- Present the Report to the Board of Directors/Rabbi/ED and congregation.
- Present the PowerPoint presentation to the congregation.
- Make a written copy of the Report of Findings available in the library and living room for the congregation.

Possible Barriers:

The following are possible barriers and should be considered when reviewing the results presented in the *Report of Findings*.

- Number of surveys returned.
- Incomplete surveys.
- The number of surveys does not represent the opinions of 100% of the membership.
- Questions that are written that are misunderstood by the respondent.
- A perceived lack of confidentiality in reporting the data.
- Accuracy of Directory
- Accurate membership numbers.
- Margin of error

Project Coordination:

- Co-coordinators: Angela Holmes, Randie Noell, Nancy Fidel
- Support: Marty Graffman, Rabbi Cohen, Mia Sands

Report of Findings

Data:

Numbers of Responses = 146

Approximately 450+ surveys were distributed via e-mail, mail and personal contact beginning July 2, 2016. **146** surveys were returned by September 1, 2016. The data percentages are calculated by N=146 unless a category has fewer responses.

Age Groupings of Respondents: aggregate of Adult 1 and 2

74% of the respondents were in the 55 to 85 age range.

<u>Age Range</u>	<u>Males</u>	<u>Females</u>	<u>Total</u>	<u>%</u>
21-34	0	4	4	3
35-44	4	7	11	7
45-54	5	9	14	9
55-64	11	22	33	23
65-74	13	30	43	29
75-84	9	12	21	14
85+	5	7	12	8
No Age Given	5	5	10	7
Total	52	96	148	100

Professions:

There were 133 responses for Adult #1 and 67 for Adult #2. Many did not list their profession when they stated their profession as 'retired'. It is recommended that future surveys should ask that profession should be included with the response of 'retired.' See "Professions" Table 1.

Birthdays: 216 responses representing adult 1 and adult 2

January – 13	February – 20	March – 9
April – 18	May -17	June – 23
July – 22	August – 17	September – 18
October – 17	November – 21	December – 21

Services: Services that can be listed in a TBS Directory of Services

Services listed were in the aggregated into the following areas:

- Legal
- Computer
- Self-defense
- Graphic design
- Academic tutors
- Home décor
- Security and safety
- Real estate
- Photography
- Piano lessons
- Bail bonds

Years of TBS Membership

<u>Years of Membership</u>	<u>Number</u>	<u>%</u>
1 – 5	23	18
6 – 10	12	1
11 – 15	6	.5
16 - 20	20	16
21 - 25	12	1
26 +	52	42
No response		21.5

TBS Activities Attended

- All – 8
- Adult Education Classes - 24
- Book Club - 2
- Brotherhood – 10
- Chai – 4
- Chavurah – 4
- Choir – 7
- Community Members (various, including Board) – 11
- Cultural events – 2
- Family Programs - 3
- Fundraisers – 10
- Holiday Services – 7
- High Holidays – 28
- Knitting – 4
- Mahjong – 3
- Mitzvah Meals – 13
- Religious School – 10
- Shabbat – 31
- Shabbat (occasionally) - 5
- Sisterhood – 16
- Social Events – 5
- Special events – 19
- Torah Study - 16

Live-streamed Services:

75 of the 146 households reported that they have used live-streamed services one or more times. This represents 51% of the homes that returned the survey.

Methods used for information about TBS events: Which methods do you use to find out what is happening at TBS? The Respondents were asked to check-off all that apply.

Method	#	Percentage
TBS Website	81	55%
TBS On-line News	108	74%
Religious School News	15	10%
Thursday Evening Calls	69	47%
Shabbat Bulletins	45	31%
Congregational Programming	36	25%
Facebook/Twitter	24	16%
Word-of-Mouth	75	51%
Flyers	45	31%
Text Messages	13	9%
Postal Mail	49	34%

Outside TBS Affiliations and Family Interests and Activities

Book Clubs

- Book Clubs (not specified) - 15
- Hadassah Book Club - 1

Clubs

- Boys & Girls Club - 2
- Mahjong – 7
- Fused glass making
- Canasta Club – 4
- Boy Scouts of America - 5
- Adult Badge Group (Boys Scouts)
- National League of Young Men
- Knitting / Crocheting - 5
- Girl Scouts – 2
- Girl Scouts of Orange County Board Member
- Parent Teacher Organization (PTO) – 3
- OSHER Life Long Living CSUF
- Spinning/weaving clubs of Orange County

- Wounded Warriors
- Wine Club

Music, including Dance

- Pacific Symphony – 3
- OC Philharmonic – 2
- OC Chamber Music
- School Band – 2
- Folk Dancing Group
- Symphony
- Snappy Dancers CSUF

Other Community Affiliations

- Tustin Public School Foundation
- League of Women Voters – 2
- Chapman University Holocaust Programming
- Bowers Museum
- Anaheim Public Library Foundation Board Member
- Kids at Science
- Orange County Science and Engineering Fair
- Olli CSUF - 3
- Jewish Federation of Women Philanthropists
- Community Scholars Program – 2
- USC Alumni
- Heritage Point – 2
- VSA Orange County – 3
- Kaiser Hospice
- Movies - 5
- Chavurah – 5
- Barbershop organization
- City of Hope
- AARP – 2
- Masonic Temple
- Shriners
- Lamplighter Guild
- Anti-Defamation League

- Casa Teresa Emergency Shelter for Women
- Scottish Rite
- Orchid Societies - 2
- Billiards
- Scrapbooking

Professional Organizations

- Tustin Council of Fine Arts
- American Psychological Association
- California Psychological Association
- Orange County Psychological Association
- United Steel Workers
- Retired Employees of Orange County
- Jewish Bar Association
- California Music Educators Association
- California Retired Teachers Association

Religious Related Activities

- Hadassah– 7
- Chabad Temple in Yorba Linda
- Jewish Federation
- Jewish Labor Committee

Sports

- U.S. Lacrosse Association
- Kokikai Aikido
- OC Hiking Club
- Baseball
- Ski Club
- LA Galaxy
- LA Dodgers Fan club
- Angel's Boosters Club
- Ju Jitsu
- Swimming - 2
- Walking
- Little League

- Gym members – 10
- Krav Maga
- Tennis
- Horses - 3
- Hockey
- Golf
- Triathlons
- Fencing

Theatre

- Theatre – 17
- Orange County Performing Arts - 2
- South Coast Rep – 4
- Barclay
- Segerstrom – 3
- Mark Taper Forum
- Ahmanson
- Chance Theatre
- Laguna Playhouse - 4
- Bridge Theatre Group
- Irvine Classical Symphony
- Ballet
- La Mirada Theatre -3
- Cerritos Performing Arts Center
- Orange County International Film Festival

What are the strengths of TBS?

○ **Clergy**

- The Rabbi and Cantor are accessible and caring and open to new ideas.
- The Rabbi and Cantor are so full of happy energy, and the music is always amazing during evening (Shabbat) services.
- The Rabbi and Cantor are welcoming and patient with the children. Both of them always include the children in services and activities.
- The Rabbi and Cantor inspire me to attend services.

- **Rabbi**
 - We are blessed to have/I love:
Excellent/Wonderful/caring/energetic/awesome/the
best/outgoing/personable/great/enjoy/fantastic/friendly/receptive
Rabbi.
 - Our Rabbi is the most friendly and welcoming, this is not only noticed
by its members, but also by any guests to our Temple.
 - Our Rabbi is key in creating an active, warm, loving, religious
institution within the heart of Orange County.

- **Cantor**
 - A wonderful/talented/creative/excellent/good/the
best/fantastic/great Cantor.
 - I love the Cantor's music.
 - Responsive to our needs.
 - A great resource for all things musical.

- **Community**
 - Warmth! A sense of camaraderie.
 - We are a caring and compassionate congregation.
 - The feeling of community.
 - Family oriented.
 - I appreciate the outreach in the community.

- **Diversity**
 - This is an open Temple for all lifestyles and that is what I wanted for
our family and children.
 - Acceptance of diversity within the congregation.
 - Inclusion of all people, Jews and non-Jews.

- **Facility (There were many references to the beauty of the facility)**
 - A physically beautiful facility.
 - Beautiful new campus!
 - The Temple is a beautiful place to be.

- **Friendly Congregation**
 - I love the welcoming community! Everyone is so friendly, and I love how welcoming the Temple seems toward minority groups, LGBTQ members, etc.
 - This caring of our community in situations in which congregants need some assistance is beyond compare and is an attribute of which we should be extremely proud.
 - Longevity in the Orange County Jewish community.
 - I have always felt welcomed no matter what my financial situation is.

- **One Family**
 - TBS has a focus that all of the members are one large family and work together to form a Jewish community that embraces helping with each other and those in need.
 - Being part of a big Jewish family which neither of us have.
 - Really nice families.
 - Caters to all generations.
 - I love my Chavurah!
 - Family night services.

- **Programs**
 - Our Adult Education is rebuilding and offers some interesting alternatives for many different 'tastes.'
 - There is a good mix of activities all year round that are spiritual, social and educational.
 - Mitzvah Meals
 - Sisterhood and Brotherhood
 - A welcoming and caring Torah Study group.
 - I think the best thing is TBS is always looking for ways to improve, like this survey.

- **Religious School**
 - Preschool and religious school teachers/administrators are wonderful.
 - We enjoy the religious school staff.

- The children are the focus of many of our programs and they are very much a part of our community.
- **Sense of Community**
 - (TBS) Feels like home.
 - The Temple feels like a second home to me.
 - Community building ideas.
- **Services**
 - The welcoming feeling of being at TBS during Friday night Shabbat.
 - I enjoy Friday night Shabbat as it is always lively.
 - I really love the feeling of Friday.
- **Support Staff**
 - A knowledgeable, efficient professional support staff.
 - Excellent staff.
 - Leadership from our clerical staff.
- **Worship**
 - Welcoming and uplifting sense of spirituality.
 - Shabbat services
 - Providing meaningful services for all throughout the year.

Positive Suggestions for the Growth of TBS:

These responses are listed as written on the Survey, except where more than one response is noted by number.

- Reaching out to members needs to be stronger.
- Schedule activities to be more realistic for young families and working parents.
- Increase our education with trips to L.A. and other cultural events.
- Co-sponsor musical entertainment with other synagogues and share in the profits.
- Keep us updated by friendly phone calls.

- Later Friday night services. (6)
- Bring back cultural Shabbat services.
- Continue doing what you are doing.
- I think the latest inclusive Shabbat services bring in members.
- I would love to see more being done for you singles and couples with no children.
- Have good speakers on important topics on Friday services 3 to 4 times a year.
- Start educating our congregants regarding boycotts by companies, such as Nivea. Encourage planting trees.
- Reach out to others that are not on multiple committees.
- Who are TBS members? Connect us.
- We need poster/picture collages in the living room showing the many ways members are involved in TBS activities.
- Bring back greeters!
- We need someone to 'helm' the membership endeavors.
- We need a Director of Community Engagement.
- Find fun ways to engage families after their kids are done with religious school.
- More sermons at Friday night services. (2)
- Include children in their 20's that are not affiliated with the synagogue.
- Offer single, young couple and senior memberships that are affordable.
- Enhance name recognition in community.
- Develop a standing committee for communication.
- Field trips that are social.
- Baby care
- Get more activities from the Federation for residents of North County.
- Have speaker series at Shabbat services to attract more attendance.
- As a senior, I might enjoy more activities for seniors.
- Discussing world events and that affects Jews in the US.
- Make sure no one sits alone at a service.
- There needs to be a more centralized way to disseminate Temple news.
- Would love to see dessert Oneg after Temple.
- Make activities more affordable for families.
- A year round choir would be wonderful.
- Attract more young people.

- Advertise our activities to the surrounding community.
- More emphasis on Chavurahs.
- Speakers series.
- More people need to be involved in decision making.
- More potlucks.
- Improve marketing and advertisement.
- Follow-up on new members.
- TBS needs a legacy program.
- Thanks for doing this survey. It's a good start.

Would you like to learn more about TBS leadership?

This was the last question on the survey.

There were twenty (20) individuals who responded that they would like to know more about Leadership at TBS. The names were forwarded to the Board of Directors.

Other information, opinions and input:

These comments were listed given in the *positive recommendations* section, however, it was felt that they strayed from a positive tone. None-the-less, all comments should be considered and were presented here as a separate section.

- We would like to see a better attendance of many of the many Board members.
- Congregants need to know more of the inner workings of the Board. There is a lack of inclusion.
- Board members are not friendly.
- More gravitas from the pulpit.
- Congregants must learn to participate in, take responsibility for and enjoy pride in services.
- I prefer a different prayer book.
- Make sure leadership is well trained and have skills that they bring to the Board. Make sure they understand expectations of leadership.

- The gift shop is too small.
- The Board needs to be more involved in recruitment.
- 10% of the people do 90% of the work.

Other Relevant Data:

Personal Contact Summary:

There were 35 requests for further contact. The coordinators were able to contact 24 of the requests via phone conversations and one through personal contact.

When Board President, Andrea Wasserman and Executive Vice-President, Jack Holmes became aware of such an interest, they asked to speak to them. All 35 were invited to a meeting by the on the evening of September 27, 2016. Twenty-one of the 35 attended the meeting.

An agenda was put together to cover inquiries from 4 major areas of current concern. Notes were taken to capture the contributions of the attendees. After the meeting, Andrea and Jack mentioned the possibility of the Board holding open meetings on a regular basis for the purpose of directly listening about the cares and concerns of the membership.

The questions asked at this meeting were:

1. What are your thoughts about community *communication*?
2. What is meant by the need for *transparency* in our community?
3. What are your ideas about *membership dues* that address the issues of equity, compassion for all congregants, while insuring fairness?
4. Many congregants say that they *volunteer* but are never called. How do you feel about this?

Although this information was not part of the original survey, it is valuable information that broadens the value of conducting a Survey. Above all it addresses the value of listening directly to the membership of TBS. All responses are listed in the Report of Findings and have been given to Board of Directors.

In addition to the 4 questions, an additional *Comments/Questions* section is included.

Community Communication

- I look at my e-mail and then look at the website for details.
- Who gets their information from the weekly calls on Thursday?
- I rely on flyers and word-of-mouth.
- I miss the Kol Sholom. I prefer paper. (3)
- Communication needs to be filed and repeated.
- I am not using the “community” tab on the website calendar.
- The website is cumbersome to use.
- I don’t have a computer.
- Sisterhood sends our quarterly information and reminders.
- Screens in the living room do not scroll information.
- I organize myself around my computer. I like the website.
- What about sending Save-the Date- cards?
- What about an additional e-mail that just reports reminders? It can be a “Happening of the Week” update of activities.
- Maybe a second robo call would help.

Transparency

- The Board makes decisions, but how much input do they get? A lot of people need to provide input for big decisions.
- When the building was being designed, no one knew what was going on!
- Board meets when?
- Are minutes (of Board meetings) posted anywhere?
- I didn’t know Board meetings were open to the entire community? (2)
- Are Board minutes archived?
- Where are agendas posted?
- Have any non-Board members attended Board meetings?
- Posting and telling us what is going on goes a long way to this transparency issue.
- Presentations need to have time for community input. Wider input as well. Board may have a narrower perspective, especially since so many have been on the Board for so long and do not attend Temple activities.
- Input versus asking questions.

- At some point you have to allow the Board to make decisions. The community can give input and the Board will have to make the decision that think is best.

Membership Dues

- I don't want to see all the listed items.
- There is a need to entice younger members.
- Establish multiple levels of dues.
- When did we get multiple levels?
- A long time ago there was a Senior dues level.
- Dues level and a donation option (should be the structure).
- Rabbi's Circle is a major jump of money. What does it afford me?
- (List) one price of dues with what your membership includes.
- Find out what models are working in other comparable Temple's.
- Single dues, couple dues, family dues, couple without children dues...why? More people, more costs?
- Fiscally responsible dues schedules.
- Examine the Chabad model (of membership).
- Define family.
- More people will pay more with Yahrtzeit donations, etc.
- Credit membership with volunteer activities.

Volunteerism

- A form exists that can be filled out and goes to Chairs. This would need to be coordinated.
- Mitzvah Meals app works quite well.
- Use the telephone. Personal contact works. (i.e. how bingo functioned)
- After the fire we wanted to help, but were turned away.
- People say they want to volunteer, but when you call them, they back away.
- Ask for people to help based on their skills and experience.
- Personal contact is important.
- List of volunteer jobs with specific needs for that job is needed.
- Credit member ship with volunteer activities.

Other Comments/Questions

- The survey will provide baseline data that we can build from.

- Who responded to the survey?
- The survey has implications for programming.
- Increased transparency by the Board is needed.
- 1990 was the last time we did Focus Groups.
- Please survey the community for the programming they need and want. Decisions should be made based on broad input.
- Tonight's group is just one demographic. Most of the people here are older.
- Appeal to people's passions.
- Think outside the box.
- There needs to be stronger coordination of the calendar.
- Hours for Friday night services (need to be examined based on congregants requests).
- I hope everyone was honest tonight.
- Very little gets done.
- I need a timeline for when improvements are going to be made based on the comments from this meeting.
- Report back to us what you are going to do (after tonight).
- I would like to know about follow-through.
- I want to hear about specific solutions.
- Thank you for doing the survey. It's a beginning.

Recommendations:

The following is a list of recommendations for the leadership of TBS and any other group that may benefit from this insight.

1. Continue to actively acquire input from every household.
2. Improve methods for reaching out and connecting with the underrepresented age groups, like the 26-45 year old demographic, which should include the TBS religious families.
3. In the 2008 Mission Statement, it states that "Temple Beth Sholom is dedicated to making our congregation a focal point of Jewish family and communal life for our members through excellence in professional and lay leadership, education, programming and spirituality." Based on this belief, review the 2008 Master Plan with what was learned from this Survey and determine if there is a need for revisions.

4. Review TBS policies and procedures based on the Survey data. Review the results of the Survey with the idea of understanding if what has been learned can affect all Temple operations.
5. Distribute data to all TBS leadership for review and possible revisions of their programs and methods of operation.
6. Make the 2016 *Report of Findings* available to all congregants.
7. Conduct a comprehensive community survey at least every five (5) years to remain current with the needs of the congregants.
8. Consider conducting a one (1) year follow-up Survey to evaluate and review the changes made by TBS leadership as a result of reviewing and adapting changes suggested from the 2016 Survey.
9. Review and revise the census procedures for the next Survey. Consider using the data obtained from this Survey to develop future Congregational Learning objectives (i.e. adult education, family education, congregational programs) based on the congregational interests noted in the Survey. Review the list of affiliations/activities outside of the Temple to consider realignments of Temple programming.
10. Use more quantifiable questions in the next Survey so that patterns can be observed and monitored.
11. Follow-up with respondents who requested to be contacted for leadership opportunities.
12. Review the list of affiliations outside of the Temple to consider realignment of Temple Programming.

Recommendations for Further Study:

At the conclusion of any research project, there are further issues that emerge that may be beneficial for future action by the organization. The following are three that TBS may consider.

- Periodically schedule Focus Groups representing every group of the TBS, (i.e. Youth, custodians, office staff, Board, religious school parents, seniors, singles, families, families with no children, widows/widowers, etc.) facilitated by an outside moderator.
- Revise Master Plan and refer to results of survey where appropriate.
- Utilize the Survey results when developing a Marketing Plan for TBS.

Attachments

1. Survey
2. Timeline
3. Spreadsheet (without names)
4. Mission Statement