

Strategic Plan

Temple Sinai is a synagogue that practices the principles of Reform Judaism and offers an exceptional, one-of-a-kind place of worship, assembly, study and celebration. For three decades, with a list of some 400 member families, we have provided an atmosphere of warmth, inclusion and kindness: A temple that embraces members and guests alike, providing a safe haven and a vibrant venue for Jewish religious, educational, cultural and social programs.

Temple Sinai is more than a synagogue: It's a way of life, a social and moral compass, a home. Temple Sinai is truly A Place of Family and Torah.

As a way to encourage each to find their connection to our Jewish heritage and traditions, we have developed this strategic plan to lead the temple forward. Driven by members, we have developed a plan for maintaining the integrity of the temple, while moving our focus to the needs of the community.

Branches of Temple Sinai (tree of life)

Integrated Marketing

In order to market the temple services and programs to unaffiliated locals, as well as new residents and snow birds, marketing needs to be updated to the latest technology.

Possible initiatives:

- **Expand and modernize the website to be more user-friendly to encourage interaction with potential and current members. Include:**
 - Live streaming of services (requires tech improvements in sanctuary and social hall)
 - Ability to pay online for events (e.g., dinners, High Holy Day tickets, membership, etc.)
 - Online store/e-commerce
 - Clergy and/or educators actively blog or contribute to social media
 - Member forum to encourage interaction
 - Links to Facebook, Twitter and other social media (designate staff member)
- **Marketing (sub-committee with charge)**
 - Update branding materials, including mission statement
 - Recognize active contributors in marketing
 - Create targeted marketing materials and send to specific sub-groups (i.e., contribution levels, unaffiliated families, etc.)
 - Survey membership (current and former) to encourage feedback and implement change based to results within six months.
 - Increase our regional presence to encourage regular LA/Orange county visitors to become member/associate members through contacting Jewish journals etc.
- **Streamline email blasts as well as sending out physical newsletters with potential for advertising revenue for both online and in print.**
- **Utilize CRM - new management software**

Membership development (getting them here)

Membership attrition is a threat to temple success. A vibrant membership is the best way to ensure the temple flourishes. By retaining current members and reaching out to potential members, Temple Sinai will grow.

Possible Initiatives:

- **Expand the Membership committee**
 - Work with the Finance Committee to determine the number of members needed to break even at different members levels, taking into consideration varying dues.
 - Sub-committees focused on either attracting new members or improving current member relations.
 - Offer 5% discount to members who bring three new paid members.
 - Marketing materials to allow current members to see progress of membership (i.e., thermometer showing member and goals).
 - Plan activities covering specific interests/topics (i.e., movie night, book club, bowling, wine club, travel club, etc.)
 - Hold classes at Tamarisk/Indian Ridge to generate interest in Temple Sinai
 - Create scholarship/endowment fund for religious school (removing barrier of being a member)
- **Increase Temple hospitality**
 - Give out name tags so members can get to know non-members and potential members.
 - Membership committee acts as greeters for those attending services.
 - Nurturing of new members from both office staff/clergy, as well as temple leadership.
 - Encourage veterans to befriend new members – create a “host family” network
 - Rabbi to engage guests from the Bima Friday night so congregants can follow up at ONEG
 - Temple-wide potluck picnic for cross generational outreach and to encourage family atmosphere.
 - Increase member participation in services and staffing events
- **Expand social activities**
 - Have more open houses
 - Create Havarahs and have open house where members can sign up.
 - Have one objective of Havarahs to be community service (or advocacy) to benefit the Temple.
 - Small cocktail meet and greets with wide cross section of community represented.
 - Have off campus events for the younger members.

Financial sustainability – includes facilities

Paying off the mortgage and increasing temple revenue are paramount to the survival and vitality of Temple Sinai.

Possible Initiatives:

- **Ensure financials are accurate and budgets are monitored and updated in a timely manner**
 - Replace current Treasurer (per Jack's request)
- **Analyze Membership dues and structure:**
 - Continue improving dues structure
 - Determine new payment system that takes into consideration technology and alternative ways to pay.
 - Monitor effect of what the new renewal structure (opt-out) vs. old method and determine financial profit/loss.
 - Launch membership drive utilizing new dues structure
- **Expand fundraising:**
 - Capital Campaign to promote growth and increase financial stability
 - Continue working with SEMBLE to raise \$1.1 -1.5 million as bridge loan (reduce interest rate, increase cash flow, has excess funds for facilities capital improvements)
 - Promote endowments
 - Educate congregants on charitable giving, gift annuities, legacy giving, donation of car or other valuables, etc.
- **Improve facilities:**
 - Post capital campaign, improve/modernize facility and increase Temple curb appeal.
 - Utilize large lot for pavilion-type addition, which increase the likelihood that temple would be utilized (for a fee) by the larger community for social events, JCC and other activities.
 - Assist with the building of toilets for Calvary
 - Explore solar panels
- **Increase grant opportunities:**
 - Maintain and maximize yearly federation allocation by creating working committee to oversee entire grant writing process.
 - Seek alternative grants from differing sources

Enhanced mind/body/spirit programming – making services more accessible

Temple Sinai is competing with many different social, spiritual and physical activities. To reach affiliated and unaffiliated Jews, programming must meet the needs and wants of the community.

Possible Initiatives:

- **Programming**
 - Creative adult education programming focusing on relevant engaging classes that should have multi-generational appeal.
 - Expand calendar to offer workshops, as well as day and night classes
 - Family oriented social programming and events (i.e., BBQ, picnics potlucks, etc.)
 - General public classes: Yoga classes, Women’s self-defense, Fitness classes, Krav Maga, Israeli cooking, etc.
- Increase usage of social hall through cosmetic improvements and modernization.
- Increase events with great public appeal
 - Continue and enhance speaker series.
 - Music concerts (i.e., Rick Recht, etc.)
 - Plan community event that bridges the age gap and includes everyone in the community (i.e., Mitzvah day?)
- Maintain and improve religious school.
 - Greater integration and outreach for families, encourage leadership roles.
 - Work with Social Action committee to work with students to increase exposure to community service opportunities.
- Expand services
 - Special Shabbat Services (i.e., Sisterhood Shabbat, adult confirmation Shabbat, etc.)
 - Continue to make services more modern, user-friendly and inclusive.

Promoting the Jewish identity and continuity within our community (keeping them here)

Perpetuating the cultural Jewish identity locally (and our connection to Israel) is the only way to ensure future health of Temple Sinai and the entire desert Jewish community.

- **Joint programming**
 - Maintain and enhance working with wider Jewish community through joint temple programming (Beth Shalom), Feast of Learning, etc.
 - Increase Temple Sinai presence in wider community with Israel Festival and events like Jewish community day at baseball, etc.
- **Community involvement**
 - Request input from community regarding programming, etc.
 - Encouraging people to get involved.
 - Generate an atmosphere of ownership – we are all in this together!
 - More involvement with Tikvah
- **Israeli connection**
 - Plan a trip to Israel for Temple members
- **Expand involvement of younger generation**
 - Create teen leadership / youth board to plan events.
 - Involve kids in religious school with temple events

Community Impact

Through the successful implementation of the SEMBLE loan, Temple Sinai's financial stability will be ensured, allowing for enhanced and expanded programs to better serve the Jewish community in Coachella Valley, as well as implementing the goals set forth in the strategic plan.

Temple Sinai is a multi-generational Jewish Congregation, centrally located in Palm Desert, CA. We are dedicated to serving the spiritual, educational and social needs of the Jewish community in the Coachella Valley, through inclusion. We welcome Jews of all backgrounds and affiliations, as well as interfaith families and those from the broader community.

Temple Sinai ensures Jewish continuity through the three essential pillars:

- Mind – Jewish education serving all age groups
- Body – Social and community outreach activities
- Spirit – Spiritually relevant religious services

We offer a wide variety of programming in support of these goals:

- Jewish Education – Children are the future and Temple Sinai's vibrant religious school and Tikvah Preschool keeps the next generation engaged with a varied curriculum teaching the relevance of Jewish value and identity, as well as a love for the State of Israel. The Bridge loan will allow Temple Sinai to upgrade aging classroom facilities, as well as enabling rental during non-school hours to local colleges. Our Adult education program offers a wide variety classes as well as speaker series events bringing powerful and influential Jewish leaders to the desert, such as Senator Barbara Boxer, State Senator Jeff Stone, Congressman Raul Ruiz and Prof. Mordechai Kadar.
- Social and Community Outreach – Temple Sinai caters to the whole body strengthening personal bonds within the local Jewish community through social programming and activities bringing all generations together from young families, Jewish Singles, baby boomers and the Greatest Generation. Capital improvements will allow for expansion of activities to include Yoga, Israeli Krav Mega (Self Defense), fitness and health classes. Various social events are offered throughout the year (i.e., speakers, luncheons, movie nights, fashion shows, concerts, etc.) to attract unaffiliated Jews in the region. In addition, the highly successful Temple food bank program includes a dedicated group of volunteers delivering bags of food to needy families.
- Religious services and Pastoral care – Spiritual services that encourage congregational participation by making worship both relevant and user friendly through musical and inspirational readings and prayers. Pastoral care is also essential for Jewish continuity by providing support and guidance during life cycles events from birth, conversions, weddings, bar mitzvahs sickness and in grief. Bridge loan will help support and allow for expansion of these services for greater outreach and community participation.



Additional Background

Demographics and Membership: Temple Sinai currently serves more than 330 member units, mixed between families and individuals. Membership levels vary to better serve the unique nature of the region. We offer not only full-time, but also associate memberships for our large part-time or snowbird population, as well as sliding scale dues structure to accommodate those with a financial need. Scholarships to the religious school or other Temple events are also available, upon request. To ensure a connection to the community, we also participate in reciprocal memberships with other Temples during the High Holidays. In the next few year, we hope to grow our membership to 500 members.

Facilities: Temple Sinai sits on nine acres of land in the heart of Palm Desert. The main Temple building houses the Sanctuary, a smaller Chapel, social hall, a full industrial kitchen, a gift shop, restrooms, several modular classrooms, and temple offices. The basement of the main building is currently rented to a Church from which the Temple receives monthly rent. The preschool building hosts four classrooms with bathrooms, a large playground, kitchen and offices. There is a large plot of grass that has been left undeveloped and a large parking lot. The buildings and the surrounding property are more valuable than high mortgage indicates; although the main building needs updating, there is an opportunity to better utilize the existing social hall and facility, as well as expand the campus.

Finances: Temple Sinai relies on membership dues, donations and fundraising for income. The Temple operates on a very tight annual budget, with a small yet dedicated staff. Through the work of the Finance committee, Temple finances are expected to improve through development efforts from external sources (i.e., endowments, legacy giving, fundraising, etc.) and the change in how dues accessed.

Marketing/Communication: Temple Sinai is in the process of updating how the Temple is marketed to the greater community. Plans are underway to update and make the website more user-friendly, this includes implementing technology solutions to stream services and other events to congregants and other interested parties. Other forms of communications include a monthly newsletter, known as the Shofar, which is distributed electronically and hard copy to all current members and weekly eblasts / emails to keep members informed about upcoming events and programs. Efforts continue to increase the social media presence of the temple.

Temple Sinai Funding Opportunity

Temple Sinai is about to embark on a truly exciting and highly beneficial investment opportunity that will be offered to both our present congregants and the Jewish community at large throughout the entire Coachella Valley

Our incredibly dedicated finance committee has been working tirelessly over these past number of months to address a decade long issue-the very encumbering \$1.1 million mortgage presently in place through the Berger Foundation-at a whopping 7%.

This mortgage and it's very high interest have prevented the various boards and management from being able to 1. reduce the monthly fixed costs 2. expand our religious, educational, cultural and social programs, and 3. to build out sustainable long term financial and expansionary strategies

Working with the Semble Group, a technology and service provider facilitating low-cost loans between socially-minded investors and nonprofit organizations, our finance committee has created a loan package that will be offered to investors backed by the very strong collateral assets of our temple building and the land it sits on.

Semble is not a bank, rather a wonderful online lending platform that bridges strong partnerships between nonprofits and the communities that support them.

These are extraordinary and exciting times for Temple Sinai under the brilliant, creative and artistic leadership of our Rabbi Andrew Bentley and a vibrant and dynamic Board of Trustees driven by the exceptionally talented, focused and passionate leadership of the Board's President, Beatrice Eslamboly.

Temple Sinai and its leadership have worked very hard to put in place a true L'Dor

V'Dor

lasting environment and culture-one where our children and their children will thrive and prosper from one generation to another. Mentoring our younger members, guiding them spiritually, educationally and culturally, providing a true home for all that wish to not just perpetuate our Jewish way of life-yet expand and take it to entirely more profound levels-that is what this investment opportunity is all about!

Through the successful completion of this investment funding program-we will be able to cut our monthly fixed costs substantially-will be able to accelerate both the ultimate pay down of this new loan as well as building an ultimate balance sheet capable of taking us into the next decade and beyond.

Payback Strategy

The successful closure of the Semble directed funding effort should provide a number of options for servicing of the financing. Additionally other opportunities for principal repayment will surface during the loan period.

For example:

1) the differential between the interest rate on the proposed financing of 3.5% and our current loan interest rate of 7% will provide \$35,000.00 of uncommitted capital which may be reserved for loan servicing.

2) a portion of the loan will permit expansion of the current "nursery school" to include pre 2 year olds, many still in diapers. A new module, to be added from the loan proceeds, will provide an opportunity to serve this vastly underserved population. The availability of this additional service by our highly acclaimed Tikvah nursery school will generate immediate and positive community response and should provide a net income increase of XXXXXXXX

3) Refurbishing/replacing existing modules represents an opportunity to provide rental space for selective organizations seeking small comfortable quarters at a reasonable price.

We currently rent such space to Calvary Chapel church with whom we have enjoyed a mutually beneficial landlord/tenant relationship for many years. Funding for upgrading our current modules and increasing lavatory facilities will increase our rental income and maintain our current and future rental partners.

4) A refocus on the direction of our annual fund raising efforts will shift to a goal of greater net income increases. The emphasis will be on more higher quality/higher value programs.

5) While difficult to quantify, we anticipate a steady increase in our membership; primarily due to the new leadership, both lay and religious. We make securing new members a high priority. There is an increasing recognition in the coachella valley that Temple Sinai, is the place to go. Much of this "buzz" is the recognition of our stellar religious school and a

recognition of the new approaches to community involvement in our reform services.

6) As part of our strategic long range planning process, during the third year of the current financing, we will lay the groundwork for a major capital campaign to be introduced in our fourth year. WE are confident that the years preceeding this campaign will reconfirm that we are building towards a successful future for Temple Sinai.