

United Synagogue of Conservative Judaism - Hayom  
Strategic Planning Commission

VeAsu Li Mikdash\* :  
A Strategic Plan for the  
New United Synagogue of Conservative Judaism

*Prepared by*

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**March 2011**

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\* "And let them make Me a sanctuary..." (Exodus 25:8)

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## Transmittal Letter

Dear Friends,

We are pleased to submit the enclosed strategic plan for consideration and adoption by the Board of Directors of the United Synagogue of Conservative Judaism and for consideration by the members of Hayom. The Plan was approved unanimously by the USCJ-Hayom Planning Commission at its final meeting on March 4<sup>th</sup>.

A draft of this document was created as a result of extensive deliberations of the USCJ-Hayom Strategic Planning Commission and was supported by research, analysis, and consultations by the UAI team led by Dr. Jacob Ukeles and Prof. Steven M. Cohen. The draft has been refined and revised in light of extensive input from stakeholders over the last month -- more than 500 emails and nearly 1,000 face-to-face contacts in meetings, online Webinars and focus groups. Through this process many voices were heard. Of course, this is a consensus document deliberated on by a commission, thus all suggestions for change in language or content were subject to discussion and review and not all were eventually adopted and passed by the group.

Some participants in this review process suggested that the new language of "kehilla" is confusing or opaque. Of course, most members of the USCJ will continue to refer to themselves as congregations or synagogues. The Plan recognizes this, but it is important that we constantly remind ourselves of what synagogues are – that is, Jewish sacred communities, and that we welcome less formal Jewish sacred communities such as chavurot or minyanim as well as the more established form of sacred community – the synagogue.

As described in the document, we, the Commission, feel that Conservative Judaism in North America is at a crossroads. We must focus serious effort on strengthening and transforming the synagogue, which is the primary institution of our communal Jewish life.

We should be clear that this is a strategic plan for a new USCJ. It is not a plan for Conservative Judaism or the other leading organizations and bodies identified with Conservative Judaism. At the same time, we believe it is impossible to separate the future of USCJ from the future of Conservative Judaism. To be successful, USCJ needs to forge a powerful strategic alliance with the other leading centers of Conservative Judaism in North America.

Please keep in mind that the purpose of this plan is to create a framework for a new USCJ. While it proposes an overall strategy and direction, it is not meant to provide the specifics. A document like this sets goals and describes parameters within which an organization should function. We envision an aggressive implementation process, starting immediately as soon as the plan is approved and lasting from two to three years.

We close by thanking all the members of the Commission and the consultants for their extraordinary dedication and commitment to this process. We began many months ago with a goal in mind but no sense of the path we would take to reach it. As the process evolved the group found the means to grow together to articulate what you have before you. We also want to thank everyone who made the effort to engage in the review of the draft plan. The input we received was extremely valuable in creating the best possible plan for USCJ.

Dr. Jacob Finkelstein

Rabbi Ed Feinstein

Co-Chairs, USCJ-Hayom Strategic Planning Committee

# Strategic Plan

## **The Case for a New United Synagogue of Conservative Judaism**

Two critical considerations undergird the case for a new USCJ: the necessity of a vital Conservative Judaism in North America and the importance of having Conservative congregations that are both inspiring and well-functioning.

### **Conservative Judaism**

For nearly a century, United Synagogue has been one of the organizations leading Conservative Judaism. Conservative Judaism is the essential anchor of the vital religious center of North American Jewry.

No clear boundaries or bright markers define this vital religious center, a segment that is pivotal to the future of North American Jewry. This center can be discerned by the following signs and tendencies. Jews in the center:

- Attach great importance to being Jewish and to Judaism as a religion.
- Marry other Jews and have mostly Jewish friends.
- Prefer egalitarian prayer, conducted largely in Hebrew.
- Favor social engagement that has a distinctively Jewish take on the world.
- Value Jewish text learning.

This group spans the spectrum from the left fringes of Orthodoxy to the right fringes of Reform, and it includes serious post-denominational Jews. But the vast majority explicitly identify with Conservative Judaism. Because people in this group, even when they do intermarry, tend to raise their children as Jews, this group enjoys relative high levels of Jewish demographic staying power.

In the coming years, this vital religious center can become stronger and more vibrant, serving as the fulcrum of Jewish life in North America. Alternatively, it can decline and fade away, with its people shifting to the left or to the right in an increasingly bifurcated North American Jewish world.

Conservative Judaism faces a number of well-documented challenges that must be overcome. These include an aging constituency, long-term decline in numbers of self-identified Conservative Jews, and decrease in denominational identification by some talented and innovative young Jewish leaders.

The absolute number of Conservative Jews in North America, and their share of congregationally affiliated Jews have been declining since the 1960s. The reasons are multiple. First, the number of non-Orthodox North American Jews between 25 and 44 years old is shrinking relative to those between 55 and 74. The number of in-married young couples is shrinking as well, with commensurate growth of non-married and intermarried Jews. Second, Conservative Jews today are older, on average, than

Reform, Orthodox, Reconstructionist, post-denominational, or non-denominational Jews. Over the years, losses to Conservative identity have been offset in part by commensurate gains for Orthodoxy, post-denominational, non-denominational, and secular identities.

The challenges are not only demographic but cultural as well. Religious identities are more fluid. Over the years, North American Jews have shifted from identities of belonging and affiliation to identities of purpose and meaning – that is, in line with larger societal trends, younger Jews in particular are less invested in institutions, boundaries, and explicit norms, and more interested in the high quality and relevance of their experiences.

Many Jews in their 20s and 30s appear to be averse to being labeled or categorized. Therefore, by definition, many are not interested in being part of a “movement” or having a Jewish denominational label such as “Conservative.” Many young people who grew up in the Conservative movement are migrating to post-denominational or modern Orthodox settings. They are creating a numerically small but culturally significant resurgence of Jewish life in five areas: communities of prayer, self-directed learning, culture, social justice, and new media.

### **Conservative Congregations**

Congregations remain the single most important institutional focus of Jewish life in North America. Even with declining membership, more Jews in North America belong to congregations than to any other form of Jewish institution or organization.

A strong and vibrant religious center for North American Jewry requires strong and vibrant Conservative congregations. Conservative congregations must overcome financial stress, declining and aging membership, a narrow leadership base, weak denominational commitment, and a loss of meaning for many younger people.

Concerns for the future of Conservative congregations have been palpable and growing over the last decade. In a 2006 USCJ-sponsored survey, congregational leaders expressed their concerns and anxieties, which centered around four Ms: members, money, movement, and meaning.

In a study conducted in mid-2010, one quarter of Conservative congregational leaders report their congregations to be in serious financial difficulty; and another quarter report some difficulty.<sup>1</sup> In contrast, five years ago only 8 percent were in serious financial difficulty. In 2010, only 9 percent of adult members of Conservative congregations were under 40. Only 13 percent of Conservative leaders report that their congregations

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<sup>1</sup> FACT Study, 2010; computations performed by UAI.

experience “a lot” of rotation in leadership roles. Only 24 percent of Conservative leaders strongly agree that their congregation “celebrates their denominational heritage.”

The USCJ can and must play a pivotal role in realizing the potential of Conservative congregations and overcoming these challenges.

USCJ has 652 affiliated congregations with 204,000 membership units. 44 percent of these congregations have fewer than 200 members; they account for only 14 percent of membership units. The 46 largest congregations, representing 7 percent of the member synagogues, account for 25 percent of membership units.

Over the last nine years, USCJ has lost about 6 percent of its congregations and about 14 percent of its membership. The largest declines in membership units, 30 percent, have been in the Northeast. The 36 largest congregations have declined the most, both in number of congregations (33%) and in membership units (38%).

Congregations are more likely to seek help from USCJ than any other source in every area except fundraising, but 42 percent of congregational leaders report that their fellow leaders are mixed in their satisfaction with USCJ. Only 28 percent report that they are satisfied, and 30 percent report that they are unsatisfied. Congregations of every size and in every region report growing ambivalence about their continued membership in USCJ. At a time when they are cutting their own congregational budgets and clergy’s salaries, few leaders express enthusiasm for paying dues to an organization that they feel is not delivering.

USCJ recognizes its responsibility to transform itself into a true partner for all Conservative congregations as they strive to be exciting and compelling places of meaning and purpose for North American Jews, invigorating the appeal of Conservative Judaism to the younger generation and articulating a clear and compelling message.

This is the moment of truth for USCJ. In many ways this plan is about seizing the moment.

## **A Vision and Mission for the New USCJ**

### **The Vision**

The United Synagogue of Conservative Judaism is a community of kehillot -- sacred communities -- committed to a dynamic Judaism that is learned and passionate, authentic and pluralistic, joyful and accessible, egalitarian or traditional.

Our kehillot create the conditions for a powerful and vibrant Jewish life, empowering Jews in North America to seek the presence of God, to seek meaning and purpose in Torah and mitzvot, to fully engage with Israel, and to be inspired by Judaism to improve the world and the Jewish people.

United Synagogue of Conservative Judaism creates the spiritual, intellectual and managerial network that enables each of our kehillot to fulfill their sacred mission and connects all our kehillot with a common sense of community, shared mission and purpose. Together with other centers of energy identified with Conservative Judaism, we articulate and disseminate our approach to Judaism.

### **The Mission**

- To transform and strengthen our kehillot in their effort to:
  - inspire meaningful prayer
  - sustain a culture of lifelong Jewish learning
  - nurture religious and spiritual growth
  - promote excellence in kehilla leadership
- To ensure educational excellence true to the vision of Conservative Judaism for children and adults in our kehillot
- To engage the next generation of kehilla leadership
- To encourage and build new kehillot.

### **The Language of “Kehilla”**

The change in language from “synagogue” or “congregation” to “kehilla” is more than semantic. It reflects two concepts: First, it focuses on the *raison d’être* of a congregation or synagogue, i.e., that it is a sacred community. Second, it signals a welcome to those kehillot that are not formal synagogues – such as chavurot and independent minyanim.

## **North America: Challenge and Opportunity**

It is recognized explicitly that USCJ brings together Jews from two different countries in North America -- Canada and the United States. They have different histories, cultures and systems of government. USCJ will reflect these differences in its governance, operations, communications and publicity.

## **Recommendations**

This plan includes four strategies to create the new United Synagogue of Conservative Judaism:

- **Focus on core functions**
- **Build new models of membership, participation, leadership and governance**
- **Create an effective and integrated regional presence**
- **Expand and redeploy financial resources**

### **I. Focus on core functions**

#### **1.0 USCJ should concentrate its energy - programs, staff and resources - on performing three functions:**

- Strengthening and transforming existing kehillot
- Creating and supporting an integrated, collaborative educational system for children in kehillot
- Seeding and nurturing new kehillot and engaging the next generation of kehilla leadership

#### **2.0 USCJ should embark on a significant effort to help kehillot, sacred communities, reinvent themselves for the 21<sup>st</sup> century.** USCJ's first priority is to partner with kehillot in their striving for excellence, encouraging them to challenge themselves in a continuous process of self-improvement. The goal of this effort is to build community – to cultivate effective change-oriented leadership, to provide engaging prayer, adult learning, adult spiritual development and meaningful programs. USCJ will provide kehillot with programmatic and managerial resources to help expand membership, increase participation, create a welcoming environment, cut costs, increase revenue and operate efficiently.

To realize this priority USCJ must expand the dollar resources allocated to continental programs dramatically, to strengthen and transform kehillot.

2.1 To achieve these goals, USCJ will have to develop significant capacity, using both internal and external resources in a number of areas:

- Leadership development
- Strategic planning
- Management – strengthening the business side of kehillot (e.g., information services, marketing and communications, human resources, budgeting, revenue and cost management, financial resource development, facilities management, security, new technology, membership services, insurance, purchasing).
- Content expertise (e.g., prayer, adult learning, program development)
- Situational expertise – the particular opportunities and problems associated with different types of kehillot:
  - Small, medium, and large kehillot
  - Growing, stable, and declining kehillot

2.2 USCJ should use four methods to strengthen and transform kehillot by providing:

- Expert consultation
- Tested programs reflecting best practices
- Opportunities for kehillah professional and lay leaders to network in order to learn from each other, both in person and using web-based technology
- Relevant information in user-friendly formats, including web-based resources

Providing such a broad array of transformative services requires USCJ to develop new core competencies and to make extensive use of external resources. It literally would be impossible for USCJ to develop competency in so many different areas.

2.3 Wherever possible, USCJ should use external resources to strengthen and transform kehillot through the methods identified in 2.2 above. USCJ should identify the best resources, develop formal or informal strategic alliances with those resources, purchase services, provide matching funding for individual kehillot, and create incentives for kehillot to help each other.

- 2.4 USCJ should continue and expand partnerships with the other organizations and institutions identified with Conservative Judaism. For example, the Rabbinical Assembly and the Cantors Assembly are positioned to play important roles in strengthening and transforming kehillot, as is the Jewish Theological Seminary of America and the Ziegler School of Rabbinic Studies. The North American Association of Synagogue Executives could play a role in developing the management toolbox. The Jewish Educators Assembly and Jewish Youth Directors Association could partner on education.
- 2.5 USCJ's continental staff, working with kehillot, should fulfill two functions:<sup>2</sup>
- Identify, connect with, and manage access to continental resources.
  - Provide specialized services that are not available elsewhere.
- 2.6 The continental staff should specialize in those areas intrinsic to creating compelling kehillot as identified in the mission statement -- excellent leadership, meaningful prayer, lifelong Jewish learning, and religious and spiritual growth.
- 2.7 In its work to strengthen and transform kehillot, USCJ should draw on the expertise and experience developed over the last decade by synagogue transformation efforts produced by such organizations as the Alban Institute, STAR, ECE, Synagogue 2000/Synagogue 3000, Project Re-imagine, Legacy Heritage Innovation Projects, Federations, JESNA, etc.

**3.0 USCJ should lead a collaborative effort to create a unified vision for Jewish education and to build an integrated system of experiential and formal education from preschool through high school, in partnership with other institutions and organizations committed to Conservative Judaism.**

The goal is to provide young people, from birth through adolescence, with the opportunity to develop the motivation and capacity to lead committed Jewish lives. While the emphasis here is on reforming the educational system for children, this strategic plan recognizes the importance of adult learning and the need to sustain a culture of lifelong Jewish learning. There are many sound programs available for adult learning, which should be encouraged. The greatest need, however, is in re-imagining the educational system for our children.

An integrated educational delivery system for children includes congregational early childhood programs, family education, congregational schools, USY/Kadima youth programs; Solomon Schechter day schools; Ramah camps; and USY/Kadima regional, national, and international/Israel programs.

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<sup>2</sup> See Recommendation 13.0 for a discussion of the role of regional staff

Developing a coherent educational philosophy, strategy and delivery system for Conservative Judaism is a huge challenge and an extraordinary opportunity to shape the future.

USCJ's educational mission should have three components:

- Strengthening and transforming key elements of the educational enterprise. Many of these needs are now unmet, so this will require additional resources.
- Creating synergy among the components of the system. Different elements of the educational system should reinforce each other.
- Creating and disseminating integrated educational models, especially models that integrate formal and experiential Jewish education for individual kehillot.

3.1 Educational programs under USCJ's aegis should be re-organized by type of consumer rather than by type of service or product. The most recent research and experience in Jewish education argues strongly for the elimination of program-based silos.<sup>3</sup> For example, there could be four operating units or centers, each focused on a particular age group and related family programs:

- Young children (early childhood)
- Children (primary school)
- Pre-teens (middle school)
- Teens (high school)

Of course, each of these centers should incorporate specific expertise in aspects of Jewish education.

3.2 USCJ should use the same methods to strengthen and transform educational programs that it will use for kehillot:

- Expert consultation
- Tested programs that reflect best practices
- Opportunities for educators to network in order to learn from each other. both in person and through web-based technologies
- Relevant Information in user-friendly formats, including web-based resources

3.3 Each USCJ center or operating unit should partner with institutions and organizations that have the specific expertise and responsibility for different dimensions of the educational enterprise identified with Conservative Judaism:

- Camping - the Ramah Commission

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<sup>3</sup> See e.g., *Linking the Silos: How to Accelerate the Momentum in Jewish Education Today* (Avi Chai Foundation, 2005)

- Congregational education – the Jewish Educators Assembly and the Jewish Youth Directors Association
- Day school education - the Solomon Schechter Day School Association
- Research and training - the Davidson School at JTS and the Fingerhut School at American Jewish University

3.4 As a first step, USCJ should convene a blue-ribbon panel, including the best educational thinkers identified with Conservative Judaism and Jewish education in general, to create the framework for this vision and its implementation.

3.5 In a form yet to be determined, this plan can encompass the creation of a central address for Conservative Jewish education, headed by an educational leader who can articulate and implement a compelling vision for Conservative Jewish education.

#### **4.0 USCJ should seed and nurture new kehillot and engage the next generation of kehilla leadership.**

**USCJ has an extraordinary opportunity to extend the reach of the core ideas of Conservative Judaism to new geographic areas and to partner with those in the next generation who share its vision. The landscape of North American Jewry is constantly shifting, and USCJ should be in the forefront with efforts to create new places of purpose and meaning.**

4.1 USCJ should reach out to new or growing Jewish areas in order to seed new Conservative congregations. These include:

- The western and southern regions of the United States.
- Magnet cities that are attracting large numbers of Jewish young adults, such as Atlanta, Boston, Chicago, Denver, New York, Los Angeles, San Francisco, Toronto and Washington DC.
- New or growing urban neighborhoods, which attract young adults in virtually every large metropolitan area. In these areas, USCJ should partner with adjacent Conservative congregations to create formal or informal satellites.

USCJ should use Jewish population research to identify areas of growth.<sup>4</sup>

4.2 USCJ and Conservative congregations should nurture new and emerging independent minyanim, which tend to engage singles and young married adults who do not have children. Supporting them today could help build Conservative kehillot tomorrow.

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<sup>4</sup> See e.g., the North American Jewish Data Bank.

- 4.3 USCJ should support both new and emerging kehillot with consultation, technical assistance and financial resources (e.g., interest-free start-up loans).
- 4.4 USCJ should to engage young Jewish leaders -- both Conservative and post-denominational -- in a serious conversation about how USCJ can best respond to the search for Jewish community in their generation. In the words of a recent comment by a JTS-ordained rabbi in Sh'ma, "A multigenerational mix of Jewish leaders might challenge the unhelpful dichotomy between innovators and establishment, enduring institutions and inchoate new ventures, 'insiders' and "outsiders'. In our own ways, we might focus on the shared task of making Judaism relevant and meaningful in the future."<sup>5</sup>

USCJ efforts to engage the next generation of kehilla leadership should be in two parts:

- 4.5 It is recognized that a continuing presence on campus for Conservative Judaism is vital to maintain the bridge between our high school students and the young adult post-college generation. It is not clear who should fund this effort and what the effort should look like. Since USCJ has been funding and administering the effort through Koach, in the short term USCJ should continue to do so in a highly focused and cost-efficient way. Simultaneously, USCJ should engage with college student leaders, and leaders of Conservative Judaism, to determine how best to work in partnership to ensure that the USCJ presence on the college campus not only remains but grows.
  - 4.6 A new effort should focus on the post-college generation. USCJ should fold Project Reconnect and K'sharim into this function.
- 5.0 USCJ should undertake a serious review of all current continental and district programs to see which should be continued, which need to be restructured to be mission-congruent and which need to be eliminated. Existing services and programs that do not directly support a core function should be restructured so that they do support a core function, should be phased out, or should be transferred to another auspice. In particular, continent-wide freestanding USCJ programs need to be integrated into kehilla strengthening and transformation, even if this means a loss of USCJ program identity.**

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<sup>5</sup> Nussbaum, Rachel 'GenXers and Boomers: Humility and Tzimtzum'

- 5.1 As part its effort to strengthen and transform kehillot, USCJ should offer access to consultation services and resources to kehillot that want to create meaningful programming for seniors. The Hazak program should be restructured to fit into the kehilla transformation function.
- 5.2 Recognizing the historic importance of social justice in Jewish tradition, and the vital work being done by many Conservative kehillot, USCJ should offer consultation and access to existing resources to kehillot interested in setting up or improving their own social justice, community service or environmental programs. This activity should take place as part of kehilla strengthening and transformation, rather than as a separate standalone continental program.

**6.0 USCJ should appoint an independent blue-ribbon commission to undertake a complete strategic review of the Fuchsberg Center in Israel, including its relationship to USCJ, Masorti and Masorti Olami.**

**7.0 USCJ needs a new name that aligns with the new vision and mission and that reflects the new focus on kehillot.**

**Along with the change in vision, mission, and strategic priorities, a name change is imperative to signal the new day that is envisioned for the organization and its important role in support of Conservative Judaism. It is recommended that a committee be formed to tap branding expertise to develop the new name that best reflects what USCJ aims to become.**

## II. Build new models of membership, participation, leadership, and governance

### **Membership**

USCJ is expected to remain a membership organization. The vast majority of members of USCJ will be Conservative synagogues, but including others who are part of the vital religious center of North American Jewry in the new USCJ signals the new dynamism in the Conservative movement and could bring imaginative and creative leadership to efforts to energize and revitalize Conservative Jewry.

**8.0 The members of USCJ should be kehillot, i.e., sacred communities.**

- 8.1 All self-defined kehillot should be eligible for membership, provided that they:
  - Explicitly endorse the vision of Judaism in USCJ's vision statement.
  - Emphasize prayer, Jewish learning and religious and spiritual growth
  - Accept the standards of rabbinic practice of the Rabbinical Assembly

- 8.2 Self-defined Conservative congregations, independent minyanim, chavurot, “traditional” congregations and other such kehillot should be eligible to become members of the new USCJ if they meet these criteria.
- 8.3 USCJ should give priority attention to re-engaging kehillot that have resigned their membership.

## **Participation**

It is important to underline that the new USCJ should be an organization of kehillot, not only an organization of lay leaders of kehillot. The new USCJ’s potential lies in its ability to create settings where all kinds of leaders can come together and work together for the improvement of Conservative Judaism. The strategic planning commission that produced this document models the kind of cooperation we envision and know to be possible.

**9.0 Everyone performing a relevant leadership role should be invited to participate in USCJ’s activities, to represent their kehillot, and to take leadership roles in USCJ. This category includes lay leaders (including men’s clubs and sisterhoods), rabbis, cantors, experiential and formal educators, and administrators.**

- 9.1 The chair of the Board of USCJ shall be a lay leader. (See recommendation 11.0 below.)
- 9.2 USCJ should work closely with the professional organizations identified with Conservative Judaism - the Rabbinical Assembly, the Cantors Assembly, the Jewish Educators Assembly, the Jewish Youth Directors Association, and the North American Association of Synagogue Executives. These organizations not only serve their members’ specific needs but also are important community-building partners for USCJ.
- 9.3 USCJ should continue to partner with the Women’s League for Conservative Judaism and the Federation of Jewish Men’s Clubs.

## Leadership

For decades, USCJ has benefited from the efforts of dedicated, knowledgeable, and committed leaders. Most rose to leadership positions by dint of hard and effective work as officers of their congregations and leaders in their regions or districts. They brought a deep commitment to Conservative Judaism and a deep understanding of United Synagogues' history and programs.

USCJ leaders remained loyal and active long after their terms of office were over. Many board members have served for decades. The tradition of United Synagogue has been that its leadership is hands-on, sharing specific tasks with the professional staff.

The challenges of creating a new, more dynamic, more effective, and more focused organization requires a new model of leadership – one that is capable of mobilizing significant philanthropic resources and big ideas, a leadership that will focus on policy and hold the professional staff accountable to a high standard of performance.

### **10.0 The USCJ's leaders should be philanthropic investors, thought leaders or organizational leaders, each of whom would be expected to share USCJ's vision of Judaism.**

- 10.1 The majority of the new USCJ's leaders should be drawn from a pool of philanthropic investors, who are capable of significant investments in the new USCJ and who are motivated to do so.
- 10.2 A second group should be thought leaders, who have the intellectual stature to influence the course of North American Judaism, especially the course of Conservative Judaism.
- 10.3 A third group should be organizational leaders, who have a demonstrated track record of judgment and wisdom in the Jewish organizational world, including but not limited to United Synagogue.
- 10.4 Board members should commit to a significant annual contribution to USCJ consistent with the giving standards of other major Jewish organizations in North America, either through a direct personal contribution or by engaging others to contribute.<sup>6</sup>
- 10.5 The charter commission (see recommendation 11.7) should make a specific recommendation establishing a board member's expected annual contribution.

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<sup>6</sup> The Strategic Planning Commission discussed an annual \$10,000 gift, on a "give or get" basis, as an appropriate expectation.

## **Governance**

### **11.0 USCJ's governance should include the General Assembly, the Board of Directors and the Executive Committee.**

- 11.1 The General Assembly (GA) should be the representative body of all kehillot. Each kehillah should select a voting representative and an alternate to the GA from among its senior leadership -- e.g., its current or immediate past president, senior rabbi, senior cantor, senior educator or administrator. The GA would vote on candidates for officers, at-large members of the Executive Committee and members of the Board of Directors, and should elect its own chair from among its members. The GA chair should be a UCSJ officer. The GA should meet every year, and, among other functions it should approve amendments to the constitution and bylaws.
- 11.2 The Board of Directors should be the USCJ's chief governing body. It should have fiduciary responsibility for assets, hiring and firing the executive, approving and overseeing budget, developing and enforcing policies (e.g., conflict of interest, ethics, etc.) and all other powers and responsibilities necessary to comply with the applicable statutory requirements of the state in which USCJ has been incorporated. It should consist of 30 to 50 members and should be made up of the three types of leaders identified in recommendation 10.0. The Board should include the members of the Executive Committee and the district council chairs. The Board of Directors should meet at least three or four times a year.
- 11.3 USCJ's chief professional officer should be the CEO. The CEO is responsible to the Board of Directors for carrying out USCJ's mission and advises the Board on appropriate policies.
- 11.4 The Executive Committee should consist of a small group of highly experienced leaders who support and guide the CEO in USCJ's ongoing operations and substitute for the Board of Directors if a policy decision is required between board meetings. The Executive Committee should consist of the officers (chair, two vice chairs, the treasurer and the secretary); the chairs of the most important committees (see 11.5) and three to five at-large members. The committee should meet frequently (possibly monthly) either in person or via video. The chair of the Board should serve as chair of the Executive Committee.

11.5 In addition to the standard operating committees typical of nonprofit organizations (e.g., budget), four board committees should oversee USCJ's core functions:

- Kehilla Strengthening and Transformation Committee
- Education Integration Committee
- New Kehillot Committee
- NextGen Committee

11.6 USCJ should have a standing Nominations Committee, whose chair should be a member of the Executive Committee. The Nominations Committee should present a slate of officers, at-large members of the Executive Committee, and board members to the GA. The composition of the Nominations Committee should be addressed by the ad-hoc charter commission. (See 11.7 below.)

11.7 USCJ should convene an ad-hoc charter commission to prepare a new constitution and bylaws for the new USCJ. This committee should address additional issues in governance (including term length for officers and members of the board and Executive Committee, composition of the Nominating Committee, term limits, etc.). The charter commission should also review the functions and activities of the Council of District Leadership and decide whether they should be integrated into the GA or the Board of Directors or whether the Council of District Leadership should continue as a board committee.

11.8 The charter commission should develop policy and procedure to ensure Canadian representation in USCJ governance.

11.9 USCJ should create an honorary board to recognize the contributions of past board members and to offer them an opportunity to continue to participate.

### III. Create an effective and integrated district presence

USCJ's districts need to be integrated seamlessly into the continental delivery system, with a clear and consistent model of service and clearly defined areas of regional autonomy.

**12.0 The USCJ needs to be a single organization with a clear and consistent continent-wide identity. It should create an effective balance between the district perspective, which reflects important cultural differences among the different regions of North America, and the continental perspective.**

- 12.1 The commitment to vision, mission and the three core functions needs consistency across all geographic areas:
- Strengthening and transforming existing kehillot<sup>7</sup>
  - Creating and supporting an integrated formal and experiential educational system for children for Conservative Judaism.
  - Seeding and nurturing new kehillot and engaging the next generation of leadership.
- 12.2 Similarly, USCJ's communications should be consistent across the districts. Thus, for example, USCJ's main website should be a portal for the district web sites, and they all should be consistent in tone and look.
- 12.3 Within this framework, it is appropriate for some products and services to be continent-wide and others to be specific to a district.
- 12.4 Each district may undertake programs that meet the specific needs and opportunities in particular areas of its district. The focus should be on programming that is at a larger scale than any one kehilla can mount or afford (e.g., with a star teacher, scholar in residence, or artist) and furthers the focus on core functions of USCJ.

**13.0 District field professionals should be connectors and relationship builders. The lead district professional should be a “district relationship manager” The core competence of field professionals is in networking -- connecting kehillot to each other, connecting kehillot to local resources, and connecting kehillot to USCJ’s continental headquarters. Their goal is to help kehillot in their search for excellence, and they will be equipped with the models and tools identified or developed by USCJ.**

- 13.1 In order to be an effective change agent, the new USCJ needs professional staff on the ground -- physically located in the districts, although not necessarily in an office.
- 13.2 USCJ field professionals should visit kehillot on a regular basis. They have to develop a close personal relationship with each kehilla lay and professional leader. The basic operating principle should be outreach—the field staff should spend most of their time in and with kehillot. To do their jobs effectively, field professionals need to know the kehillot and understand each one's specific mix of challenges and opportunities.
- 13.3 District field professionals should bring congregational leaders together to work on common opportunities and problems and to share experience and expertise.

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<sup>7</sup> Elements of Kehilla transformation related to children are included in the second function, [Educating the Next Generation](#).

13.4 USCJ field professional should be supplemented by highly skilled and trained volunteer relationship builders. Volunteers should be selected carefully and receive significant recognition from USCJ. Each district relationship manager should recruit volunteers from the ranks of the most successful former kehilla leaders to extend the field professionals' reach. Training volunteer relationship builders should integrate both a continental and a district-specific component. The combination of field professionals and volunteers should make it possible to connect USCJ with each kehilla in a geographic area. The district relationship manager should coordinate the volunteers' work.

13.5 The district relationship managers should partner with the leadership of the District Council but should report directly to a senior USCJ professional at headquarters.

13.6 Districts also will retain specialists in experiential and/or formal education to connect kehillot to continental and district resources to help the kehillot transform the way in which the next generation is educated.

**14.0 Each district should have a District Council, consisting of a representative of each kehilla in the geographic area, plus the kehilla representative in the continental General Assembly. The Council's responsibilities should mirror that of the continental General Assembly on the district level.**

14.1 The District Council should elect its own chair, who will become a member of USCJ Board of Directors.

14.2 Each District Council should decide on its own internal governance structure, which should include committees, composed of various lay and professional leaders that relate to USCJ's core functions. Councils also may create additional committees to reflect their local efforts in relation to USCJ's vision and mission.

**15.0 Each district should have a district budget, which will be developed by the District Council and the district relationship manager. This budget is to fund those program activities that are specific to the district, using resources allocated from the overall USCJ budget and including funds local donors have designated for use in that district.**

## IV. Expand and Redeploy Financial Resources

Over the next two to three years USCJ needs to:

- Expand financial resource development (FRD).
- Change the dues formula and reduce synagogue dues as philanthropic resources expand.
- Re-allocate resources to core programs.
- Improve financial management.

### **16.0 USCJ should focus revenue expansion on financial resource development (FRD).**

16.1 The key to expanding FRD is the development of a board that includes significant philanthropic leaders.

16.2 A second major priority should be cultivating and engaging prospective major philanthropic investors, including both foundations and individuals.

16.3 The largest kehillot and their rabbis, many working through Hayom, should be actively involved in recruiting philanthropic leaders for the board and in connecting USCJ with potential major philanthropic investors.

16.4 USCJ needs a senior professional fundraiser, working with a strong development committee, to increase revenue from FRD.

### **17.0 USCJ should change the dues formula and reduce synagogue dues as soon as possible.**

17.1 USCJ should commit to not increasing dues for the next three years, and should reduce kehillah dues as philanthropic resources expand.

17.2 USCJ should undertake a thorough review of the dues structure, including:

- Moving from a per capita base to a budget-based formula.
- Reducing dues for the smallest kehillot and eventually also for the largest kehillot.
- Developing a formula or process for allocating dues to continental and district programs.

### **18.0 USCJ should explore the possibility of developing profit centers, focusing on products and services above and beyond the membership package.**

## **19.0 USCJ should reallocate resources to core programs.**

If the review of current programs (5.0) and the review of the Fuchsberg Center (6.0) result in program reductions, the net savings should be reallocated to core programs.

## **20.0 USCJ should invest in improving financial management.**

20.1 Each executive should be responsible for planning his or her budget in concert with the CEO and CFAO, and should be held accountable for managing that budget and for meeting specific revenue-cost goals. As part of the move toward greater accountability, USCJ should implement a charge-back system for indirect costs.

20.2 USCJ needs to have the information systems in place to:

- Track and allocate indirect costs.
- Track and allocate the time of professionals who have responsibilities in more than one program area.

## NEXT STEPS

- 1) **Approval of plan by USCJ's Board of Directors review by Hayom (mid-March, 2011)**
- 2) **Implementation plan**, including priorities and sequencing of actions to be taken to implement recommendations. It should include phasing, milestones, costs, responsibilities, time frames, measures of success, and probable roadblocks to be overcome. Implementation team to be formed following the USCJ board's approval of the plan. An outline of key implementation factors to be ratified by USCJ's GA at the end of May.
- 3) **First Steps**
  - Initiate work of the Fuchsberg Strategic Review Committee. March 2011
  - Begin work by the tefilla task force chaired by Rabbi Ron Shulman and Cantor Jack Chomsky. The task force will create templates and materials and identify best practices and consultants to kehilot. March 2011
  - Convene a blue-ribbon commission to develop a detailed plan for a collaborative approach to Jewish education vision. July - December 2011
  - Begin implementing a continental leadership initiative. April 2011
  - Establish an ad hoc governance committee to create new bylaws and recruit new leadership for new USCJ. April-May 2011
  - Implement Phase I of mission-congruent staff restructuring. July 2011
  - Reconfigure Koach. July 2011
  - Pilot young adult initiatives. Fall 2011
  - More effective marketing of economy of scale programs. Fall 2011
  - Reassign field staff and district leaders as kehillah representatives and executive volunteers. July 2011 to June 2012
  - Roll out Human Resources toolbox. January 2012
  - Establish collaborative task forces, including JTS, Ramah, Solomon Schechter Association, the RA, JEA and JYDA, to implement elements of the collaborative educational model. Early 2012.