

United Synagogue of Conservative Judaism -Hayom  
Strategic Planning Commission

Draft Strategic Plan for the New USCJ

*Prepared by*

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## Transmittal Letter from Dr. Jack Finkelstein and Rabbi Eddie Feinstein

Dear Friends,

Enclosed you will find a Draft Strategic Plan for the United Synagogue of Conservative Judaism that will be presented to its Board of Directors at its next meeting March 13, 2011. This document was created as a result of extensive conversation and deliberations of the USCJ-Hayom Strategic Planning Commission (list of members attached), and was supported by eleven months of research, analysis, and consultations by the UAI Consulting Team led by Dr. Jacob Ukeles and Prof. Steven M. Cohen.

As described in the document we, the Commission, feel that Conservative Judaism in North America is at a crossroads and serious effort needs to be focused on strengthening and transforming the synagogue, 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.**

At this point in the process, we are seeking input from our key stakeholders, you the leaders of Conservative kehillot, sacred communities, across North America. We invite you to review the document and assess the directions that have been proposed. Once all the input has been collected, the Commission will review the comments, reactions, and concerns. That process will produce a final Strategic Plan to be submitted to the leadership of HAYOM and USCJ for approval.

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 moving forward, 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 with plan approval and extending over a two to three year period.

Prof. Jacob Finkelstein

Rabbi Ed Feinstein

Co-Chairs, USCJ-Hayom Strategic Planning Committee

# Draft Strategic Plan

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

Conservative Judaism is the essential anchor of the vital religious center of North American Jewry. No clear boundaries, no 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 *generally*:

- 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 with 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 if they are intermarried, tend to raise their children as Jews, this group enjoys relative high levels of Jewish demographic staying power.

This segment of American Jewry is at a critical juncture, with significant implications for the future of American Jewry. It can get stronger and more vibrant – becoming the fulcrum of Jewish life in North America. Alternatively, it can decline and fade away – its people shifting to the left or to the right in an increasingly bifurcated American Jewry.

Despite the growth in the number of non-denominational and secular Jews, the vast majority of American Jews today do identify with a denomination. In the last national study (2000), more than one million Jews lived in households identified with Conservative Judaism.

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 any other form of Jewish institution or organization.

A strong and vibrant religious center for North American Jewry requires strong and vibrant Conservative congregations. This is the moment of truth, and Conservative Jews must lead the way. In many ways, this Plan is about seizing the moment.

**Conservative Judaism faces a number of well-documented, widely discussed challenges that must be overcome.**

The absolute number of Conservative Jews in North America, and their “market share” of the congregationally affiliated Jewish population, has been declining since the 1960’s. The reasons are multiple. First, the number of non-Orthodox younger adult Jews - adults age 25-44 – is shrinking relative to those 55-74 in the American Jewish population. So too, the number of in-married young couples is shrinking, with commensurate growth in non-married and intermarried. As a consequence, we are witnessing a sharp reduction in the proportion of in-married young couples, the prime market for synagogue affiliation in general and for Conservative affiliation in particular. 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. North Americans are more comfortable with multiple identities within themselves. Over the years, the identity emphases of North American Jews have shifted from identities of belonging and affiliation to **identities of purpose and meaning**. In line with larger societal trends, younger Jews in particular, are less invested in group identities, institutions, boundaries, and explicit norms, and more interested in the high quality and relevance of their experiences.

Many Jews in their 20’s and 30’s appear to be averse to being labeled or categorized or at best not interested in it. Therefore, by definition, many are not interested in being part of a “movement” or having a Jewish denominational label such as “Conservative.” Some of the “best and the brightest” – the products of Ramah camps, Nativ and other programs in Israel, Schechter Schools, List College and USY – 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 face 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 of congregational leaders, almost all their volunteered comments expressed concerns and anxieties, while few were upbeat. Their concerns centered around four M’s: Members, Money, Movement, and Meaning.

In a study conducted in mid-2010, as many as one quarter of Conservative congregational leaders report their congregations in serious financial difficulty; and another quarter report some difficulty.<sup>1</sup> In contrast, five years ago, only 8% were in serious financial difficulty. In 2010, only 9% of adult members of Conservative congregations are under 40. Only 13% of Conservative leaders report that their congregations experience “a lot” of rotation in leadership roles. Only 24% of Conservative leaders strongly agree that their congregation celebrates their denominational heritage.

### **The United Synagogue of Conservative Judaism has lost ground.**

USCJ has 652 affiliated congregations with 204,000 membership units. Of these, as many as 44% of congregations have fewer than 200 members; they account for only 14% of membership units. The 46 largest congregations (7%) account for 25% of the membership units.

Over the last nine years, USCJ has lost about 6% of its congregations and about 14% of its membership. The largest declines in membership units have been in the Northeast (30%). 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 fund-raising. Yet, 42% of congregational leaders report that their fellow leaders hold mixed views regarding satisfaction with USCJ. Only 28% report that they are satisfied, and 30% report that they are unsatisfied. Among congregations of every size and in every region, there is 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.

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

The USCJ can, and must, play a pivotal role in realizing the potential of Conservative congregations and overcoming these challenges. The 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. To do so, the new USCJ needs to be mission-driven, with the strongest possible leadership, and the most effective programs.

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

## 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, to fully engage with Israel, and to be inspired by Judaism to improve the world and the Jewish People. 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 a collective effort to:
  - inspire meaningful prayer
  - sustain a culture of life-long Jewish learning
  - nurture religious and spiritual growth
  - promote excellence in kehilla leadership
- To ensure Jewish educational excellence for children true to the vision of Conservative Judaism in, and for, kehillot.
- To engage the next generation of kehilla leadership.
- To encourage and build new kehillot.

The change in language from “synagogue” or “congregation” to “kehillah” 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 who resonate with the ideas of Conservative Judaism as expressed in the vision statement, but who do not necessarily belong to official Conservative congregations or feel comfortable with the “Conservative movement” label. Many of those engaged in serious, post-denominational Judaism are, in effect, expressing the principles, ethos, substance and style of Conservative Judaism.

While Conservative Judaism and Conservative congregations are at the core of USCJ's vision and mission, the new USCJ can become a nexus for serious, post-denominational Judaism as well.

## 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, and for kehillot
- Seeding and nurturing new kehillot and engaging the next generation of kehillah leadership

**2.0 The 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, and adult spiritual development, as well as meaningful programs. USCJ will help kehillot expand membership, increase participation, cut costs and increase revenue.

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 and community development.

- Management “toolbox” (e.g., 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 – i.e., the particular opportunities and problems associated with different types of kehilla (one size does not fit all).
  - Small , medium, large kehillot
  - Growing, stable ,declining kehillot

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

- Expert consultation
- Tested “turnkey” programs (reflecting best practice)
- Opportunities for kehilla professional and lay leaders to network in order to learn from each other (both in-person and web-based)
- 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, and provide matching funding for individual kehillot.

2.4 The USCJ should continue and expand partnership with the other organizations and institutions identified with Conservative Judaism. The Rabbinical Assembly (RA) and the Cantors Assembly (CA) are positioned to play important roles in strengthening and transforming kehillot, as is the Jewish Theological Seminary of America (JTS) and the Ziegler School of Rabbinic Studies. The North American Association of Synagogue Executives (NAASE) could play a role in developing the management toolbox.

2.5 USCJ 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; life-long Jewish learning; and religious and spiritual growth

2.7 In its work to strengthen and transform kehillot, the USCJ should draw on the expertise and experience developed over the past decade by synagogue transformation efforts such 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 pre-school 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.

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

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.

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

- 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. For example, one could envision 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)
- 3.2 USCJ should use the same methods to strengthen and transform educational programs that it will use for kehillot:
- Expert consultation
  - Tested “turnkey” programs (reflecting best practice)
  - Opportunities for educators to network in order to learn from each other (both in-person and web-based)
  - Relevant Information in user-friendly formats (including web-based resources)
- 3.3 Each USCJ center should partner with institutions and organizations outside of USCJ that have the specific expertise and responsibility for different dimensions of the educational enterprise identified with Conservative Judaism:
- Camping - The Ramah Commission
  - Congregational education - Educators Assembly, Jewish Youth Directors Association
  - Day school education - The Solomon Schechter 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 over the next three to five years.
- 3.5 In a form yet to be determined, this plan can envision 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 the vision. The landscape of North American Jewry is constantly shifting and USCJ needs to be in the forefront of the 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 the Atlanta, Boston, Chicago, Denver, New York, Los Angeles, and San Francisco areas.
  - 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 needs to use Jewish population research to identify areas of growth (See the North American Jewish Data Bank).

- 4.2 USCJ and Conservative congregations should nurture new and emerging independent minyanim, which tend to engage singles and young adults who are married without children. Supporting them today could help build Conservative kehillot tomorrow.
- 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 needs 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>3</sup>
- 4.5 USCJ should shift its priority in connecting young Jewish adults from the college campus to the post-college generation, recognizing that the North American Jewish community has made a much more substantial investment in Jewish life on the college campus than it has in the young adult post-college generation.

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<sup>3</sup> Nussbaum, Rachel 'GenXers and Boomers: Humility and Tzimtzum'

4.6 At the same time, USCJ needs to maintain a bridge between high school graduates and post-college young adults. USCJ should make a limited, focused investment in the college-age cohort by creating leadership development opportunities for the outstanding graduates of Ramah, USY, and Nativ, many of who are studying in List College (see recommendation 5.1).

4.7 USCJ should fold Project Reconnect and K'sharim into this function.

**5.0 USCJ needs to 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.**

5.1 The current campus environment is heavily serviced by Hillel and numerous other well-funded and professionally staffed efforts. The only way a relatively modest expenditure by USCJ can make a significant impact on campus is by highly focused interventions. While the USCJ cannot abandon Conservative Jewish college students, it needs a more effective vehicle than the current Koach program.

5.2 As part its effort to strengthen and transform kehillot, USCJ should offer access to consultation services and resources to kehillot wishing to create meaningful programming for seniors. The Hazak program should be restructured to fit into the kehillah transformation function.

5.3 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 stand-alone continental program.

5.4 USCJ should transfer its public policy and advocacy roles to a new entity, if and when that new entity is created (See Recommendation 18 below).

**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.**

At the present time, USCJ has substantial fund-raising obligations in conjunction with the completion of the Fuchsberg Jerusalem Center. Many

congregations do not see the Center as relevant to their needs, even though it commands the respect and commitment of many senior and veteran USCJ lay leaders and participants of its many programs.

The Commission should look carefully, candidly and creatively at all the options for the most effective use, organizational model and governance of the Fuchsberg Center.

**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.**

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## 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 the inclusion of 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 the USCJ Vision Statement.
- Emphasize prayer and learning.
- Meet the religious standards 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.

### 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 potential of the new USCJ lies in its ability to create settings, similar to the Strategic Planning Commission itself, where all types of leaders come together and work together for the improvement of Conservative Judaism.

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

9.1 The Chair of the Board of USCJ shall be a lay leader (see recommendation 11.0 below)

9.2 The 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 [NAASE]. These organizations not only serve the specific needs of their members, but also are important community-building partners for USCJ.

## 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 the history and programs of United Synagogue.

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 leadership of USCJ should consist of philanthropic investors, thought leaders and organizational leaders – all of whom would be expected to share the USCJ vision of Judaism.**

10.1 The majority of the leaders of the new USCJ should be drawn from a pool of philanthropic investors, who are capable of, and motivated to, making significant investments in the new USCJ.

10.2 A second group of leaders should be thought leaders – people who have the intellectual stature to influence the course of American Judaism, especially the course of Conservative Judaism.

10.3 A third group of leaders should be organizational leaders – people 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>4</sup>

- 10.5 The Charter Commission (see recommendation 11.7) should make a specific recommendation establishing a Board member's expected level of annual contribution.

## Governance

### **11.0 The governance of the USCJ should include a representative body of kehillot to be called the General Assembly; a Board of Directors made up of continental leaders; and an Executive Committee.**

- 11.1 The General Assembly should be the representative body of all kehillot. Each kehillah should select a voting representative (and an alternate) to the General Assembly from among its senior leadership, e.g., current or immediate past president, senior rabbi, senior cantor, senior educator or administrator. The Assembly 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 chair of the General Assembly should be an officer of USCJ. The Assembly should meet every year or two, and, among other functions, would approve amendments to the Constitution and Bylaws.
- 11.2 The Board of Directors should be the chief governing body of USCJ, 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. The Board should consist of 30 to 50 members. The composition of the Board should incorporate the three types of leaders identified in recommendation 10.0, and also should include the members of the Executive Committee and the Chairs of the District Councils. The Board of Directors should meet a minimum of three or four times a year.
- 11.3 The chief professional officer of the USCJ should be the CEO [President]. The CEO is responsible to the Board of Directors for carrying out the mission of the USCJ 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 the ongoing operations of the USCJ and substitute for the Board of Directors if a policy

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<sup>4</sup> The Strategic Planning Commission discussed an annual \$10,000 gift, on a "give or get" basis, as an appropriate expectation.

decision is required between Board meetings. The Executive Committee should consist of the officers (e.g., Chair of the Board, two Vice-Chairs of the Board, Treasurer and Secretary); the chairs of the most important committees (see below 11.5) and three to five at-large members. The Committee should meet frequently (e.g., monthly) 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), a Board committee should oversee each core function of the USCJ:

- Kehilla Transformation Committee
- Education 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 General Assembly. 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 by-laws for the new USCJ. This committee should address additional issues in governance (e.g., length of terms of 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 should decide whether these should be integrated into the General Assembly or the Board of Directors or whether the Council of District leadership should continue as a committee of the Board.

11.8 The Charter Commission should develop a 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 opportunities to continue to contribute.

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

USCJ, districts need to be seamlessly integrated 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 continent-wide identity. It should create an effective balance between the district perspective - which reflects important cultural differences among the major areas 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>5</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, the communications of the new USCJ needs consistency across the districts. Thus for example, district web sites, should be accessed through the USCJ site, and should be consistent in tone and look.

12.3 Within this framework, it is appropriate for some products and services to be continental-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 kehillah 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” or “relationship builders;” the lead district professional is the “District Relationship Manager.”** The core competence of field professionals is in networking -- convening kehillot to help 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, equipped with the models and tools USCJ has identified or developed.

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<sup>5</sup> Elements of Kehilla transformation related to children are included in the second function, [Educating the Next Generation](#)

- 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 located in an office.
- 13.2 USCJ field professionals need to visit kehillot on a regular basis. They have to develop a close personal relationship with each kehillat lay and professional leader. The basic operating principle should be “outreach”- field staff should spend most of their time in and with kehillot. To do their job effectively field professionals need to know the kehillot and understand their 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.
- 13.4 USCJ field professional should be supplemented by highly skilled and trained volunteer relationship builders. Volunteers should be carefully selected, and receive significant recognition by the USCJ. Each District Relationship Manager should recruit volunteers - from the ranks of the most successful former kehillat leaders - to extend the reach of field professionals. Training of volunteer relationship builders should integrate a continental component and a district-specific component. The combination of field professionals and volunteers should make it possible to connect USCJ with each kehillat in a geographic area. The District Relationship Manager should coordinate the volunteers’ work.
- 13.5 The District Relationship Managers should maintain close working relationships with the leadership of the District Council, but should report directly to a senior USCJ professional at headquarters.
- 13.6 Districts will also contain specialists in experiential/formal education to connect kehillot to continental and district resources with the mission of helping Kehillot transform the way in which the next generation is educated. Regional USY activities will be addressed in the overall approach to integrating formal and experiential educational programs.

**14.0 Each district should have a District Council. The District Council should consist of a representative of each kehilla in the geographic area, in addition to the kehilla representative in the continental General Assembly. Its responsibilities should mirror that of the continental General Assembly.**

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

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

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

DRAFT

## 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 which includes significant philanthropic leadership.

16.2 A second major priority must be the cultivation and engagement of prospective major philanthropic investors including foundations and individuals.

16.3 The largest kehillot and their rabbis, many working through Hayom, need to 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 fund-raiser 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 needs to 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 [or regional] 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.**

- Because so much USCJ activity focuses on synagogues and education the opportunities to re-capture resources by redirection are limited.
- The major opportunities are in the Fuchsberg Center (requiring a policy shift) and in restructuring the Koach program.

**20.0 USCJ needs to 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.

DRAFT

## NEXT STEPS

### 1) Dissemination of draft plan

1. Wednesday, February 2, 2011 to USCJ Board, General Assembly, staff and Leadership Council of Conservative Judaism.
2. Thursday, February 3, 2011 to public: kehillot leaders – lay and professional, USCJ website, Shefa Network media.

### 2) Review of draft plan with key stakeholders

1. In person focus groups in the Metropolitan New York area, New Jersey, Chicago and Boston
2. Two public WebEx meetings the end of February. Both will be recorded.
3. Email responses to [4tomorrow@uscj.org](mailto:4tomorrow@uscj.org).
4. The Rabbinical Assembly Executive Council
5. Cantor's Assembly
6. NAASE
7. Jewish Educators Assembly
8. The Jewish Theological Seminary
9. The Zeigler School of Rabbinic Studies
10. Women's League for Conservative Judaism
11. Federation of Jewish Men's Club
12. Parlor and electronic meetings with other focus groups throughout North America.

- 3) **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 approval of the plan. An outline of key implementation factors to be ratified by USCJ General Assembly the end of May.

#### 4) First Steps

- Initiate work of the Fuchsberg Strategic Review Committee. March 2011
- Begin work by the Tefilla Task Force chaired by Rabbi Ron Schulman & Cantor Jack Chomsky. The Task Force will create templates and materials, and identify best practices and consultants to Kehillot. March 2011
- Convene a Blue-ribbon commission to develop a detailed plan for a collaborative approach to Jewish education vision. March-June 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
- Re-configure Koach. July 2011
- Establish collaborative task forces, including a task force with JTS, Ramah, and the RA, to implement elements of the collaborative educational model. July-August 2011
- Pilot young adult initiatives. Fall 2011
- More effective marketing of economy of scale programs. Fall 2011
- Reassign field staff and District leaders to Kehillah Representatives and Executive Volunteers. July 2011 to June 2012
- Roll out Human Resources Toolbox. January 2012