

*A 10-YEAR LONG-RANGE PLAN FOR  
CONGREGATION NEVEH SHALOM*



*SEPTEMBER 15, 2011*

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## **HOW TO USE THIS DOCUMENT**

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**Executive Summary.** Provides an overview of the purpose, process, findings and recommendations of this report.

**Chapter I: Introduction.** Establishes the purpose of this long-range planning project, tells the history of previous efforts, and presents the planning questions used to guide the work.

**Chapter II: Current Conditions.** Describes in detail current conditions both internally - e.g., organization, financial, facilities - and externally - e.g., status of the national Conservative Movement, characteristics of the local Portland Jewish community - to establish the planning context and provide a point of departure for the planning process.

**Chapter III: Congregational Surveys.** Summarizes information on congregants' traits, needs, concerns and suggestions that have been synthesized from a number of surveys, including the congregation-wide written survey; telephone survey of resigned members; face-to-face interviews with congregational leaders, senior staff and clergy; and congregant focus groups.

**Chapter IV: Summary of Findings.** Establishes the Long-Range Planning Committee's planning framework, including the three planning elements of Community-Building, Jewish Education and Financial Stability. It also provides a summary of both generic and CNS-specific findings for each.

**Chapter V: Recommendations.** Presents the Long-Range Planning Committee's 60 recommendations, based on a set of "guiding principles" and with guidance on the process for and timing of implementation.

## ***EXECUTIVE SUMMARY***

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### **INTRODUCTION**

**Purpose.** At the direction of the Board of Directors, the Long-Range Planning (LRP) Committee has been meeting since October 2009 to develop a 10-year long-range strategic plan for Congregation Neveh Shalom (CNS) with recommendations to inform the synagogue's decisions in the coming decade by providing guidance on several key issues: 1) the nature and extent of future growth; 2) range of programs and services to meet the needs of current and future congregants; 3) long-term financial stability; 4) role within the Portland Jewish community; and 5) relationship to the national Conservative Movement. The purpose of this document is to summarize the findings and recommendations of the LRP Committee, thus, creating a prudent and thoughtful framework within which the congregation can undertake collective decision-making.

**Planning Process.** The proposed 10-year plan described in this document is the work of a 16-member Long-Range Planning Committee (Appendix A), composed of volunteers from the congregation's membership. The work scope (Appendix B) has four tasks:

- Organize LRP Committee (October - December 2009)
- Undertake Extended Research of Internal/External Conditions (January - September 2010)
- Test and Refine Work Products (October -- December 2010)
- Finalize Recommendations and Prepare Final Report (January - June 2011)
- Adopt Plan and Begin Implementation (September 2011 - On-Going)

**Planning Questions.** Early in its deliberations, the LRP Committee established, as the basis of its work, the following planning questions:

1. In the face of the changing environment within the American Jewish community in general and Conservative Judaism specifically, what is CNS' relationship to the Conservative Movement and the United Synagogue of Conservative Judaism (USCJ)?
2. What are the values, concerns, needs and priorities of current congregants to which CNS should respond?
3. Given current facilities, staffing and financial resources, what is the "capacity" of the congregation, as expressed in membership units? Is this the same as the "optimum" size needed to promote a sense of community, provide services efficiently and achieve financial stability?
4. What new tools and technologies can be implemented to improve intra-congregational communication and community-building?
5. What are the characteristics and needs of Portland's Jewish community for services that CNS provides? Are the characteristics and needs of future potential members markedly different from those of current congregants? How would this affect the congregation's outreach efforts?

6. What are the congregation's options to accommodate future demand within a range of growth assumptions, e.g., smaller, replacement (stasis) and/or increased membership?

## **FINDINGS**

**Congregant Characteristics.** Based on the congregational profile:

### **About 975 families with 2,700 individuals.**

- The 2,700 includes about 1,700 (61 percent) adults and 1,000 (39 percent) children.
- Gender is about 50 percent (male)/50 percent (female).
- Of these 975 households (HH), 2/3 are headed by two adults, with single adult-headed HHs accounting for the other third.

### **CNS households with children.**

- About 1/2 of CNS HHs has children.
- Of HHs with children, 3/4 have two or more children, and 1/4 one child.

### **CNS has many long-standing members.**

- The average HH has been a member for 16 years.
- About 1/3 of HHs joined CNS since 2004, with about 50 current members having joined in a typical year since then.
- Of long-standing members, nearly 1/4 of HHs have been members for 25+ years, and nearly one in ten members have been affiliated with CNS for 40+ years.
- 1984 was the year more current members joined than any before or since.

### **CNS members are older than the general population.**

- CNS adult members are older than the general population, which probably reflects Jews' later age of marriage and lower birth rates.
- When both adults and children are counted, the median age is 44 years compared to the national median age of 37.
- In addition to our 1,700 adult heads of HHs, the congregation has 330 adult children (12 percent) who are members.

### **Many are in the 50s or earlier, but lots of "20-Somethings" too.**

- More individuals are in their 50's than in any other 10-year cohort (20 percent).
- About 16 percent are in their 20s, 15 percent in their 30s, and 18 percent in their 60's.
- Another 21 percent are 70 or older, compared to 13 percent of the general population.

### **CNS members are mostly from the Portland metro area.**

- About 96 percent of CNS members live in the Portland metropolitan area, with 3 percent in Washington and remaining 1 percent elsewhere.
- About 1/2 of all HH's live in six zip codes: 97221 (12 percent), 97219 (10 percent), 97225 (9 percent), 97239 (6 percent), and 97223 (6 percent), 97229 (6 percent).

## Summary of Findings

### **Community-Building**

- Research shows increasingly less likelihood for Americans to affiliate with organizations. In Jewish communities across the country, this is reflected in declining membership in synagogues and other sectarian organizations, as well as a decreasing commitment to Jewish philanthropy. These tendencies were reaffirmed in the recent community population survey sponsored by the Jewish Federation of Greater Portland (JFGP).
- For synagogues, this has meant fewer new members and/or members who only join for a specific purpose -- e.g., their children's education -- and then disaffiliate. The perceived high cost of synagogue membership and relevance of programs and services are two important drivers in these decisions.
- United Synagogue of Conservative Judaism (USCJ) has been hard hit by this trend, declining from 850 affiliated congregations in 1985 to 675 in 2010, a 20% decrease.
- In the face of the continuing decline in synagogue membership in the Conservative and other movements, the Jewish community in general, and synagogues in particular, are struggling with how to balance outreach of unaffiliated/disengaged Jews and in-reach, better fulfilling the needs of those who choose to be engaged.
- Unlike other large USCJ-affiliated congregations, CNS has managed to maintain its membership at between 960 to 990 family units for more than a decade. This only has been achieved by replacing every resigned member unit with a new one. Disallowing for death and relocation, a number of resignations are due to dissatisfaction for various reasons. Had it retained even a small fraction of unhappy members, CNS would have grown modestly. The fact that the congregation has not grown suggests that it is not immune to current trends that have affected other Conservative congregations more significantly.
- Size matters. For those who are generally satisfied, the size of the congregation is seen as beneficial, supporting a wide range of programs and services, strong professional staffing and quality facilities without sacrificing warmth and friendliness. For those respondents who tend to be dissatisfied, the size of the congregation adversely affects intimacy, access and personalized attention.
- Despite the increasing disinclination to affiliate with a synagogue, establishing a spiritual, cultural and social community guided by Jewish precepts for which a congregation can serve as home base is considered to be of high value by congregants.

## Jewish Education

- The desire to provide Jewish education for children in general and in preparation for B'nai Mitzvah in particular is a major impetus for young families to join a congregation, as synagogue membership typically is a requirement for access to education programs.
- The traditional two-afternoon/week Hebrew School and Sunday morning religious school model has become increasingly problematic for working families and busy children who have myriad after-school and weekend activities. In response, changing models of education delivery are being instituted in some congregations, e.g., reducing the program from three days to two days, and/or shifting the traditional Sunday School to Saturdays some or all of the time, when it can be combined with other Shabbat activities.
- Encouraging children to remain in Jewish education programs following B'nai Mitzvah is an uphill battle. Participation in Jewish camping and/or trips to Israel have been shown to reinforce teens' sense of Jewish identity and commitment.
- Adults also are desirous of on-going educational opportunities. These can be provided in a variety of ways and venues, including personal tutoring, classes, lectures, film festivals, social/environmental action events and study weekends. Many Jewish communities have created coordinated adult education programming from several providers including synagogues, free-standing schools (e.g., Florence Melton), Jewish community centers, local colleges and other institutions.
- CNS has developed an innovative three-day combined Hebrew/religious school program and rigorous training requirements for B'nai Mitzvah. It also has established a comprehensive education program for high school students after B'nai Mitzvah. In the 1970s, CNS and a Seattle synagogue established Camp Solomon Schechter, where many CNS children and teenagers attend summer camp.
- Currently, 160 children are enrolled in the three-day combined education program, where there is capacity for 230 students. The Foundation School has the capacity for up to 90 pre-schoolers but only 70 are enrolled. The Hebrew high school has maintained enrollment in the range of 110 to 125 students. Despite the fact that CNS membership has remained static at about 975 families, participation in youth education at all levels has declined. This may be due in part to many CNS families who have children enrolled at the Portland Jewish Academy (PJA) where Jewish education and Hebrew language study are part of the regular school day. On the other hand, overall utilization of the Religious School demands further study.

## Financial Stability

- As part of its recently unveiled 10-year strategic plan, USCJ concludes the traditional *membership* model that has served the Conservative movement well for over 100 years must be replaced with a *purpose-driven* model. If implemented, congregations must figure out how to fund themselves with less reliance upon membership dues, which typically make up about 50 percent of the annual operational budget. This

does not necessarily mean a wholesale abandonment of the traditional membership model but does signal that congregations must broaden their funding base.

- For its part, USCJ concludes it must better articulate its message about what it is to be a Conservative Jew and provide a more relevant menu of services, programs and support to affiliated congregations. USCJ also recognizes that if it fails to provide value to its constituent congregations, the total number of Conservative congregations will continue to decline.
- With regard to its operating budget, CNS' budget for the recently-completed Fiscal Year (FY) 2010/11 was nearly \$2.6 million. Currently, the major sources of income include membership dues, pre-school/youth education fees, and fundraising. Personnel-related expense is the largest expense category followed by non-capital building maintenance, educational program and office expenses. Over the past three fiscal years, CNS has run a combined deficit of about \$40,000, suggesting that the congregation is not immune to current trends.
- CNS engaged in a capital campaign in mid-decade to raise \$9.7 million for its major facility renovation/expansion completed in 2008, for which there is currently a \$1.6 million shortfall. The latter is being financed through a mortgage that further burdens the operating budget. Due to the current recession, it has been very difficult to do additional fundraising to retire the debt.
- The congregation's endowment fund contains \$2.3 million. Moreover, investment income from endowment funds is down due to the recession, creating shortfalls in the operating budget. Once the current operating fund deficit and the remaining capital campaign debt are retired, the synagogue plans to launch a major endowment campaign with a goal of raising another \$7 million. This would bring the endowment to at least four times the size of the annual operating budget, considered to be a prudent rule of thumb.
- There remains a strong incentive for CNS to increase its membership even as the trend away from being a membership-based organization becomes more pronounced. Congregational lay leaders and senior managers suggest the congregation's optimum size is 1,200 membership units, up 20% from the current level. As part of its assessment, the LRP Committee has concluded the facility is large enough to support such an increase, although it is not clear whether it has adequate staff capacity to do so.
- As an alternative, the congregation could either merge with or lease facilities and provide organizational support to another Jewish congregation of 200 membership units or less, creating opportunities for joint programming and sharing staffing costs.
- Based on the internal survey and findings at the national level, it will be increasingly difficult to fund CNS in the traditional manner. This suggests synagogue leaders need to take a fresh and unbiased evaluation of its financial challenges including restructuring staffing and programs; developing a new membership fee structure that encourages existing non-member users to become members; identifying

additional sources of revenue; improving operational efficiencies; and reinvigorating fundraising focused on core programming.

## RECOMMENDATIONS

### Implementation Strategy

**Planning Elements.** The recommendations of the CNS Long-Range Plan (LRP) are presented below in three inter-related planning elements first described in Chapter IV:

- Community-Building (CB)
- Jewish Education (JE)
- Financial Stability (FS)

A fourth element, Information Technology, is incorporated throughout the three elements above, with the most detailed recommendations found in Financial Stability (FS-Recommendation C).

It is proposed the plan be implemented over the next 10 years, in three time segments:

- Short-term (Years 1 - 3)
- Mid-term (Years 4 - 6)
- Long-term (Years 7 - 10)
- On-Going (OG)

**Implementation Agents.** The CNS Long-Range Plan will be implemented by existing structures within the congregation, including the Board of Directors, clergy, professional staff and standing committees. The LRP Committee proposes to add two additional implementation agents to be established by the CNS Board of Directors:

- Long-Range Plan (LRP) Coordinating Committee established for the lifetime of the plan. This coordinating committee is the heir of the LRP Committee, whose work will end when the plan is adopted in September 2011. Meeting at least quarterly, the LRP Coordinating Committee will be responsible for coordinating, monitoring and reporting progress toward implementation.
- Congregational Task Force to study a recommendation in the United Synagogue of Conservative Judaism's (USCJ) strategic plan that congregations move from the traditional membership model to one of participation and engagement. The USCJ challenge is so potentially transformational that substantial additional study and reflection is warranted. The task force will consider this issue from cultural, programmatic, institutional and operational, as well as financial perspectives, so its recommendations will cut across the entire Long-Range Plan. The task force also will be charged to study on-going proposed plans by the Jewish Federation of Greater Portland (JFGP), i.e., Jewish Community Annual Membership Card and/or Jewish Birthright Card, that also challenge the traditional membership model used by synagogues and other Jewish organizations/institutions.

It is noted that a significant number of the 67 recommendations that follow are designated as short-term or on-going. There are three reasons for this:

- Those that are short-term or underway include the proposed major re-vamping of the website; increased emphasis on membership retention; increased outreach beyond the synagogue's walls; efforts to expand the funding base; and major revitalization of youth education.
- As a complex organization, CNS has significant capacity to work on several initiatives at once. The keys to a successful outcome are an agreed-upon set of guiding principles and coordination of efforts, the latter the responsibility of the Executive Director with the aid of the proposed LRP Coordinating Committee.
- Many of the following recommendations are not necessarily *additions to* the workload of staff, clergy and committees but rather *alternatives to* "business as usual".

### **Guiding Principles**

Based on a synthesis of all of its work during the planning process, the LRP Committee recommends the following Guiding Principles, which provide the philosophical framework guiding implementation of the Long-Range Plan:

1. Endorse the principles that define Conservative Judaism and make them the underpinning of all we do.
2. Acknowledge the possible shift in the traditional membership model to a model of participation and meaningfulness, as suggested in USCJ's recently-adopted strategic plan (3/11). This may require development of an alternative funding model where there is a range of ways for participants to pay for services and programs from which they gain value. The nature and extent of this major cultural and organizational shift should be evaluated further.
3. Focus on becoming the best organization that CNS can be for its current participants:
  - Respond to the needs of our most engaged congregants to increase their personal and collective satisfaction, commitment and participation.
  - Improve "in-reach" to the moderately engaged by developing programs, services and communication strategies tailored to their needs and concerns, thus, encouraging their increased involvement and satisfaction.
  - Honor the decision of congregants who choose to participate only occasionally and keep them fully apprised of CNS programs and activities.
4. Attract and engage new participants, i.e. outreach.
  - Recognize that our congregation provides a spiritual, emotional, cultural and social home. Focus on celebrating our Jewishness with prayer, music, joy and friendship.
  - View the synagogue building as the physical center of our community, but not necessarily the sole venue of our outreach, programs and services.

5. Celebrate that one of the benefits of our size is the diversity of its participants and the capacity to provide a wide range of programs, services and support. At the same time, strive to serve adequately the needs of individuals and special constituencies based on interest, age, lifestyle and life-cycle status. Actively work to remove barriers that impede a sense of friendliness, warmth and intimacy that may be an unintended consequence of our size.
6. Serve as a model for other USCJ-affiliated congregations for long-range planning at the grass-roots level.

**Recommendations.** A summary of recommendation topics by planning element follow. A detailed list of all 64 recommendations can be found in Chapter V.

### **Community-Building (CB)**

- A. Recognize a shift in demographic and cultural trends by focusing on maximizing congregant satisfaction and sense of value (Recommendations CB A1 - A4).
- B. Find creative ways to make everyone who enters the synagogue feel welcome (Recommendations B-1 - B7).
- C. Serve congregants where they are spiritually and geographically (Recommendations C1 - C-5).
- D. Enhance volunteer opportunities within the synagogue and community at large (Recommendations D1 - D2).
- E. Explore the feasibility of expanding Shabbat morning services and Shabbat-appropriate activities in what is known as the “synaplex” model (Recommendations E1 - E3).

### **Jewish Education (JE)**

- A. Improve youth education curriculum and programming to inspire students and their parents to invest in Jewish education (Recommendations A1 - A4).
- B. Ensure student and parent satisfaction with youth education by improving communication and providing more opportunities to express concerns and participate in decision-making (Recommendations B 1 - B5).
- C. Enhance adult education program (Recommendations C1 - C-5).
- D. Seek opportunities for children and adults to participate in activities with other Jewish community organizations (Recommendations D1 - D6).

## **Financial Stability (FS)**

- A. Establish a broad-based congregational task force to study recommendation of the USCJ strategic plan that congregations move from the traditional membership model to one of participation/engagement. The task force would report its findings/recommendations to the CNS Board of Directors in 12-18 months (Recommendations A1 - A4).
- B. While the task force is deliberating on potential changes to the traditional membership model, continue to operate in the current model (Recommendations B1 - B6).
- C. Make adoption of cutting-edge information technology a high priority to improve communications with congregants and improve staff efficiency (Recommendations C1 - C-4).
- D. Undertake an organizational and redeploy staff for maximum efficiency/ capacity to meet future needs (Recommendations D1 - D2).
- E. Explore external partnerships and relationships to defray costs of operations and enhance revenues (Recommendations E1 - E4).
- F. Retire outstanding debt from 2008 CNS capital campaign and increase the endowment to broaden CNS' funding base (Recommendations F1 - F3).

## ***I. INTRODUCTION***

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**Purpose.** At the direction of the Board of Directors, the Long-Range Planning (LRP) Committee has been meeting since October 2009 to develop a 10-year long-range strategic plan for Congregation Neveh Shalom (CNS) with recommendations to inform the synagogue's decisions in the coming decade by providing guidance on several key issues: 1) the nature and extent of future growth; 2) range of programs and services to meet the needs of current and future congregants; 3) long-term financial stability; 4) role within the Portland Jewish community; and 5) relationship to the national Conservative Movement. The purpose of this document is to summarize the findings and recommendations of the LRP Committee, thus, creating a prudent and thoughtful framework within which the congregation can undertake collective decision making in the coming decade.

**Planning Efforts to Date.** In 1996, the CNS Board of Directors established an initial Long-Range Planning (LRP) Committee to develop a 10-year vision for the congregation. The resulting 10-year long-range plan was adopted by the board in 1998. The plan had two major sets of recommendations:

- Hire a full-time executive director, assistant rabbi and part- or full-time development director. Subsequently, the congregation has filled these positions.
- Undertake significant renovation of the congregational campus to update existing facilities; address serious deferred maintenance; and provide additional facilities to address existing and future needs. Renovations were completed in 2008.

**Planning Process.** The proposed 10-year plan described in this document is the work of a 16-member Long-Range Planning Committee (Appendix A), composed of volunteers from the congregation's membership. The work scope (Appendix B) has four major tasks:

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## ***II. CURRENT ASSESSMENT***

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### **INTERNAL CONDITIONS**

**Congregation's History.** CNS was formed by the merger of two existing Conservative congregations in 1961, Congregation Ahavai Shalom, founded in 1869, and Neveh Zedek, founded in 1895. Based on its two antecedent congregations, CNS is the second oldest Jewish congregation in the Pacific Northwest and the oldest Conservative congregation on the West Coast. Since 1964, the congregation has been located at 2900 SW Peaceful Lane in Portland. Now Rabbi Emeritus, Rabbi Joshua Stampfer served the congregation for 40 years from 1953 to 1993. The congregation's Senior Rabbi, Daniel Isaak, assumed his position in 1993 and is now in his 18<sup>th</sup> year of service. He is joined by Associate Rabbi Bradley Greenstein and Cantor Deborah Bletstein, who joined CNS in 2006 and 2010, respectively. Executive Director Fred Rothstein has been in his position since 2000.

**Membership.** As of March 2011, CNS had 974 membership units. The congregation has been in the 960 to 990 member range for the past several years, maintaining its membership even as other Conservative congregations' membership decreases. It is also noteworthy that at CNS there has been an approximately 40 percent turnover in membership over the past decade. This reflects the replacement of aging households with younger families, a part of the natural evolution of any healthy institution. However, the consistent in-flow of new members is offset by a corresponding loss of existing members for various reasons including relocation outside the area, death, concerns about cost and size and/or dissatisfaction with staff, clergy, or programming.

As of FY 2010 – 11, "regular dues" were raised to \$2,183<sup>1</sup>, an increase of 5.5 percent over the prior year, when a regular membership was \$2,063. However, only 30 percent of members pay this rate. CNS' congregants are categorized by age, family size, or other considerations, such as married and single seniors, young adults, single-parent and interfaith families. Another 37 percent of families have negotiated reduced dues based on financial hardship. The proportion of the latter is up slightly in FY 2010 - 11 over the prior year, generally attributed to the prolonged recession. The congregation welcomes non-members to its religious services, and non-members may enroll their children in the Foundation School, attend High Holy Day services and participate in other activities at a higher cost. However, a family must be a member in good standing to enroll their children in religious school and have burial rights in the synagogues' cemeteries.

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<sup>1</sup> In "Synagogue Dues Don't Raise More Money Than Church Gifts" (Josh Nathan-Kazis, The Forward (9/17/10) reports on a national study that found that synagogues and churches raise about the same amount of money annually per adult member, about \$650, although they do so in different ways, synagogues through mandatory membership dues and churches through Sunday collections and annual giving campaigns. The study also found that in the Jewish system, the cost is more equitably distributed among congregants compared to mainline Christian churches where wealthier members contribute a disproportionate share. This study also does not take into account the significant costs for Jewish children's religious education.

In addition to basic dues, families with children pay additional fees for education, including the Foundation School, a Jewish pre-school program; and religious school, which includes the preferred three-day combined Hebrew and Judaic Studies; Sunday School is now re-named the ALIYAH Shabbat program. To be eligible for B'nai Mitzvah, children must have at least four years of religious training, most or all of which is provided at CNS, and meet stringent competency requirements; this is in addition to B'nai Mitzvah training itself. Post-B'nai Mitzvah students are encouraged to participate in Hebrew high school. Thus, these member families have a significant financial obligation in addition to annual membership dues.

**Program/Services.** CNS offers a full range of religious, social, cultural and educational programs and services to its congregants, including:

- Daily minyan, Shabbat and holiday services and observances. In many cases, the congregation offers “parallel” services to serve congregants with varying levels of observance, age, family configuration, or other special characteristics.
- Life-cycle events including brit milah/baby namings, B'nai Mitzvah, weddings and funerals.
- Youth education including Foundation School (pre-school); combined three-day Hebrew/Judaic Studies program (K-8); B'nai Mitzvah training/tutorial monitoring; and Hebrew high school.
- Programming/youth groups for youngsters of all ages from pre-school through high school and their families.
- Comprehensive adult education program.
- Feldstein Library, the largest synagogue-based Jewish library in the Pacific Northwest, supporting the work of the clergy as well as providing resources for all formal education programs and informal research and reading enjoyment of congregants and the community-at-large.
- Cultural arts program such as congregational choir and orchestra, musical programs, art shows, lecture series and weekend scholar-in-residence programs.
- Social-action program that provides opportunity to participate in environmental and social-service activities.
- Full range of adult social events and volunteer activities, including Men’s Club and Women’s League.
- *Havurot* for individuals and families with special interests or needs.
- New member outreach.

- Clergy counseling.

A full list of programs and services is contained in Appendix C.

**Organization.** Over the last 20 years, CNS has evolved into an increasingly complex organization (Figure II-1)<sup>2</sup>, including: four members of the clergy; 20 part- and full-time professional and support staff; nearly 30 full- and part-time educators; and a large active corps of congregant volunteers. The clergy consists of the full-time senior and associate rabbis, part-time rabbi emeritus and full-time cantor. The core staff is divided into three departments - education, program and administration - under the direction of the executive director.

The organization prides itself on being “congregant-driven, starting with the 30--member Board of Directors. This includes an Executive Committee composed of the president; past president; four vice presidents with portfolios for youth services, adult services, administration and ritual, respectively; secretary; treasurer; and presidents of Men’s Club and Women’s League. All but the latter two members also serve as the Personnel Committee, which oversees the contracts of the executive director and members of the clergy and deals with other personnel matters.

The nexus between the board and staff is an extensive system of standing and special committees, composed primarily of congregant volunteers, each with a staff liaison. Currently, there are 14 standing committees:

- Adult Education
- Buildings and Grounds
- Cemetery
- Cemetery Trust
- Finance
- Foundation School
- Fundraising
- Library
- Membership
- Nominating
- Ritual
- Social Action
- Youth Activities
- Youth Education

In addition, there are special committees that are temporary, intermittent or permanent, such as Archives, Auction, Beautification, *Chevra* (Burial Society), Clergy Search, Cultural Arts, Family Life Education, Senior Adults and Long-Range Planning. Moreover, any group of congregants can approach the administration about forming *havurot* or implementing new programs. The current Downstairs Minyan, Tot Shabbat and Keva services are specialized religious services developed in this manner.

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<sup>2</sup> All figures can be found at the end of this chapter.

**Volunteer Opportunities/Capacity.** As noted above, there are many standing and special committees, as well as a number of programs and activities in which CNS congregants can participate as volunteers. It is estimated that at any given time, there are up to 350 volunteers involved in CNS activities, or about 20 percent of adult members. Creating more opportunities for meaningful volunteering has a two-fold purpose:

- Expand the capacity of the congregation to serve its members' needs and participate in the greater Jewish community.
- Enhance members' sense of connection to the congregation.

Based on various sources, several issues related to volunteerism have become apparent:

- As is frequently the case, there is a core of committed volunteers who are involved in several synagogue activities simultaneously and, when asked, often take on additional assignments. This is in contrast to a large body of congregants that have little or no involvement.
- The capability of the congregation's professional staff is a double-edged sword in that sometimes it has the time and talent to do things that could be delegated to volunteers, but staff also offers the consistent level of support that volunteers need.
- The lack of state-of-the-art communication technology impairs the staff's ability to recruit, manage and properly acknowledge volunteers, among other tasks.

### **Financial Capacity**

**Operating Budget.** CNS' budget for the just-completed Fiscal Year (FY) 2010 - 11 was \$2,551,100, a 75 percent increase over the budget in FY 1997 - 98 (\$1.45 million), the year in which the congregation's first long-range plan was formulated. Key features of the CNS budget include:

- Operates on a fiscal year basis of 7/1 - 6/30.
- Uses a budgeting system that in theory postulates that revenues and expenses will balance exactly. In the event that a surplus is realized, the Board of Directors allocates the excess, such as funding unmet needs or special projects, replenishing the building fund, or incorporating it into the following year's budget. In the event of a shortfall, the board votes to cut expenses, take money from the endowment fund, or engage in additional fundraising.
- Is structured so that programs/services are either self-sustaining, are subsidized by the general operating budget, or contribute surplus funds to the operating budget. In view of the difficult economic situation, CNS expects its various cost centers to be self-sustaining to the degree possible, resulting in fee increases, additional fundraising and/or reduction of services.
- Relies upon the following sources for the majority of its income:

Dues	\$1,260,700	49%
Foundation School	\$ 333,000	13%
Youth Education	\$ 239,800	9%
Fundraising	\$ 230,600	9%
Building/Grounds/Vestry	\$ 76,700	3%
▪ Has the largest expenditures for:		
Personnel-Related	\$ 1,089,880	43%
Non-Capital Building Maintenance	\$ 307,530	12%
Foundation School	\$ 306,950	12%
Office Expenses	\$ 230,130	9%
Religious School	\$ 208,660	8%

Table II-1 presents a comparative analysis of the actual budgets for the past five years:

**TABLE II-1  
COMPARATIVE ANALYSIS OF INCOME (FY 05/06 - 09/10)**

ACTUAL BUDGET	FISCAL YEAR					percent AVER ANNUAL CHANGE 05/06- 09/10
	05/06	06/07	07/08	08/09	09/10	
Income	\$2,069,400	\$2,252,570	\$2,338,180	\$2,344,930	\$2,360,650	3.5%
Expenses	\$2,067,550	\$2,242,610	\$2,337,370	\$2,360,960	\$2,378,800	3.8%
Surplus/Shortfall	\$1,840	\$9,960	\$820	(\$16,030)	(\$18,150)	---
Total Membership Fees	\$988,190	\$1,086,750	\$1,134,320	\$1,162,770	1,160,200	4.3%
percent of Income	48%	48%	49%	50%	49%	---

Key findings include:

- Average income increased about 3.5 percent per year over the five-year period while expenses increased an average of 3.8 percent. As a result, CNS ran a deficit in FY 08/09 and FY 09/10 totaling about \$32,000.
- The proportion of the budget provided by membership dues has run consistently from 48 percent to 50 percent.
- For the FY 2010-11 budget of \$2.55 million, it was assumed membership dues would increase by 9 percent to \$1,260,700, predicated both on the increase of dues in all categories and the net increase of at least 15 new membership units. Given that the increase in membership did not occur, the budget year ended with a \$7,000 deficit, bringing the total deficit over the past three fiscal years to about \$40,000, signaling that the congregation is not immune to current trends related to declining membership and budgetary shortfalls plaguing other Conservative synagogues.

**Capital Budget/Endowment Fund.** Like other organizations, CNS funds capital expenditures for building, furnishings and equipment out of its building fund that currently contains about \$130,000. Because the cost of the recent renovation far exceeded the building fund's capacity, CNS engaged in a major capital campaign to raise \$9.7 million, for which there is currently a \$1.6 million shortfall, being financed through a mortgage that further burdens the operating budget at the rate of \$24,000/month; this brings the shortfall to about \$2 million. However, it has been very difficult to do additional fundraising to retire the debt due to the recession. The endowment fund contains \$2.3 million, considered to be far too small for an institution of this size. Moreover, investment income from endowment funds is down due to the recession, creating shortfalls in the operating budget that must be compensated for by increases in other income sources and/or cost reductions. Once the current operating fund deficit and the remaining capital campaign debt are retired, CNS plans to launch a major endowment campaign with a goal of raising another \$7 million, to bring the fund to a size approximately five times the annual budget.

**Facility Value.** On a "cost basis," CNS values its fixed assets, including land, building, equipment and furnishings, at more than \$9.25 million.

**Technology/Communications Capacity.** Both CNS staff and congregants complain that the synagogue's computer technology is seriously outdated. For staff, this means inefficiencies in the management of congregational affairs including financial record-keeping, membership information, and program participation. For increasingly computer-savvy congregants, this has resulted in a lack of clear and consistent communication about synagogue programs and events, a blizzard of electronic messages and paper mailings and lack of modern conveniences like the ability to make online payments and event reservations; the latter is in the process of being addressed via a major software upgrade.

CNS chronically has under-funded its technology development, relying heavily upon volunteer assistance to maintain its hardware, software and website. At the same time, CNS spent \$27,400 last year in paper and postage costs for mailings. One of the serious challenges is that a small number of congregants, primarily the elderly, are not computer-connected and still rely on communication via telephone and mail; developing a list of these congregants has proven difficult.

Despite technology's rapid advancement, CNS currently has an inventory of 24 computers dating from the early 2000s that have not been replaced/upgraded since. The synagogue purchases software from various sources, including United Synagogue of Conservative Judaism (USCJ).

In its report to the LRP Committee (Appendix D), the subcommittee assigned to evaluate the congregation's technology capacity summarized the following issues that should be addressed in coming years:

- There is no budget to purchase new hardware, update software, or retain professional support to maintain both.

- Congregants complain of receiving multiple and repetitive e-mails from numerous sources, causing “e-mail fatigue” and members’ ignoring and deleting e-mails.
- The Chronicle, now prepared every other month to save costs does not yet have an easily accessible home on the synagogue website.
- The religious school would like more consistent WiFi coverage throughout campus and increased website capability.
- CNS uses Crystal Reports software for management reports, reporting and decision support but its users are inadequately trained and supported.
- The system lacks a congregant internet privacy policy, data back-up system and disaster-recovery plan.
- The Feldstein Library used Follett Destiny software to manage the library collection and circulation. The software needs to be updated to the current version and on-line access to the catalogue provided, which requires a new dedicated server.

The recommendations of the LRP Committee for updating the congregation’s technological capacity are contained in Chapter IV of this report.

### **Facility Capacity**

**Synagogue Complex.** As illustrated in the site plan, CNS is located on an 8.7-acre campus in Portland at 2900 SW Peaceful Lane that takes its access from SW Dosch Road just north of its intersection with SW Beaverton-Hillsdale Highway. The Latvian Evangelical Lutheran Church also takes its primary access from Peaceful Lane although its address is 5500 SW Dosch Road. A second church, Portland Christian Center, which lies to the south on the hill above CNS, also takes its primary access from Dosch Road.

CNS’ campus is zoned for Low-Density Residential (R-7), in which religious institutions are permitted as conditional users. Tributaries of Fanno Creek run along the periphery of the site in the northwest corner, far eastern portion and along the southern edge. As a result, portions of the site have environmental overlays, which place regulatory constraints on further development of the site.

In addition to the synagogue itself, the site contains two houses at the eastern end of the site, one of which has been granted as a life tenancy for the rabbi emeritus and his wife at no cost, and the second, originally designated as the cantor’s residence, which has been in continuous use as a rental. The rabbi’s house appears to be on a separate tax lot but has no direct access to a public street and, therefore, its occupants take their access to SW Dosch Road via SW Peaceful Lane, a private street, through the synagogue parking lots. There is no record of a legal easement to take this access, which would be necessary if the house is ever sold to a legally separate entity. If the second house is to be sold, it would need to be put into a separate tax lot, achieved by means of a land partition and also would need a permanent access easement through the synagogue site to SW Dosch Road, the nearest public street.

Constructed in 1963, the original 54,000-gross square foot (gsf), “L”-shaped synagogue is built on two floors, taking advantage of the site’s slope. The main floor includes the main sanctuary, administrative and clergy offices, library and religious school classrooms; and the lower floor contains the Birnbach Social Hall, atrium, Zidell Chapel and Foundation School classrooms. There is a lower-level outdoor courtyard, accessible from the parking lot via a ramp that provides outdoor entrances into the ground floor.

In 1988, a major renovation took place, including renovation of the main sanctuary, extension of the main lobby and creation of the downstairs atrium. Since then, there have been only minor renovations, including the reconfiguration of the bimah to make it disabled-accessible, minor update of the kitchen, installation of an elevator and periodic roof repairs. However, due to a lack of funding, there had been significant deferred maintenance through the last decade. In addition, the 1960s construction was extremely dated and energy inefficient. The building also was no longer in compliance with current seismic, life-safety, disabled-accessibility and stormwater-treatment regulations.

As a result of the recommendations of the 1998 Long-Range Plan, the congregation undertook a major capital campaign to underwrite the cost for a significant renovation and expansion of the campus, which was completed in late summer 2008, in time for the High Holy Days. Improvements include:

- Major structural and basic system upgrades including installation of energy-efficient windows and lighting fixtures; repair and sealing of the building’s facade; upgrade of the heating and ventilation systems; and mandated life-safety, seismic and disabled-accessibility improvements.
- Construction of the 300-seat Stampfer Chapel, an intermediate-sized chapel/performance space and related entrance and lobby and restrooms at the southwest end of the building; and construction of a two-story administrative office block on the southeast end of the building. These two elements have been connected by a new ground-level, paved outdoor entry plaza with a decorative wrought-iron gate that provides both a gateway to the complex and improves overall security. The sloped walkway down to the courtyard at the lower level has been retained, creating a two-level outdoor area for active and passive use by congregants. This permitted extensive renovations within the existing building to relocate the Zidell Chapel and gift shop, provide a dedicated boardroom and expanded library and add some additional offices and classrooms.
- A general aesthetic upgrade including painting, replacement of carpeting and floor coverings, improved lighting and new furnishings.
- Extensive new landscaping and stormwater-treatment facilities.

As a result, the facility now contains a total of about 71,000 gsf, an increase of 30 percent. Floor plans are presented in Figures II-2A and 2B. Table II-2 summarizes the number, type and capacity of indoor and outdoor facilities now available.

**TABLE II-2  
SUMMARY OF SYNAGOGUE FACILITIES**

TYPE	#	CAPACITY	COMMENTS
Main Sanctuary	1	410 - 1,100 seats	When portable seating is placed in the back of sanctuary for the High Holy Days
Main Sanctuary Lobby	1		Used for informal gathering and small social events
Stampfer Chapel	1	300-260 seats assembly 160 seats banquet	Chapel is designed to be used for social space by screening off bimah.
Zidell Chapel	1	80 seats	
Birnbach Social Hall	1	380 seats banquet 700 seats assembly	
Social Hall Atrium	1	50 seats	Used for informal gathering and small social events.
Kitchen	1		
Clergy Offices	4		
Administrative Offices	14	1-4	10 located in new administrative wing with reception area and workroom; remainder scattered throughout building.
Board Room	1	30	
Conference Room	2	12 and 7 seats	#118 connected to Library, and small room opposite Board Room, respectively
All-Purpose Room	1	30 - 50 seats depending on configuration of seating	#104/106 Used for meetings, children's services and education
Library	1	15 seats	
Youth Lounge	1	15	Youth Director's office immediately adjacent.
Gift Shop	1	8	
Religious School Office	1	2 plus teachers	#112
Director of Education	1	1	#102
Religious School Classrooms	13	Average 15 seats for about 230 students	#101, 103, 105, 107-111, 114, 116, 118
Foundation School Classrooms	14	12 - 15 seats for a total of about 200 students	#10, 12, 14-19, 21, 23-26, 28
Foundation School Director's Office	1	1	#11
Teachers' Lounge	1	10	#31
Indoor Playroom	1	18	#27/29
Caretaker's Apartment	1	2-bedrooms	Vacant
Upper Courtyard	1	300 seats	

As Table II-2 indicates:

- The addition of the Stampfer Chapel has greatly increased the flexibility of space, for example allowing two B'nai Mitzvah ceremonies to occur simultaneously. The chapel also offers an intermediate-sized space for cultural events, life-cycle ceremonies and social events.
- When the main sanctuary is expanded into the vestry and the social hall is pressed into service, the synagogue provides up to 1,800 seats for two adult “parallel” services during the High Holy Days. In addition, Stampfer Chapel is used for family services and Room 102 for youth services. Given this breadth of options, there is still ample capacity to support congregational growth.
- Based on its complement of classrooms, the religious school has the capacity for about 230 students on Sunday mornings; 160 students were enrolled in the K-6 program for the 2009 - 10 academic year. In addition, the school presses several other facilities into service for various activities including the main sanctuary, Stampfer Chapel and social hall. Nearly 90 students are enrolled in the Wednesday Hebrew high school program serving 7<sup>th</sup> through 12<sup>th</sup> graders.
- The Foundation School has capacity for up to 90 students; its 2010 - 2011 academic-year enrollment is 70 students. .
- The new upper courtyard serves both as a gateway to the complex and as an activity space during good weather for Friday night Shabbat services, weddings, barbecues and other member social activities. The plaza and other facilities also are available for rent by non-CNS organizations.

However, three outstanding facility-related needs have been identified in the course of the LRP Committee’s work:

- **Main Kitchen.** Due to budget considerations, the main kitchen adjacent to Birnbach Hall was not included in the renovations. The kitchen is significantly outdated and needs a major renovation to replace appliances, cabinets, flooring and lighting to improve operational efficiency, promote energy conservation and comply with health and safety regulations. Despite the kitchen’s deficiencies, the congregation’s kosher caterer continues to provide outstanding service under trying conditions. His specific recommendations for upgrades include:
  - Repair or replace cabinets, flooring and stove.
  - Purchase new equipment including a walk-in freezer, new refrigerator, cook-and-hold and refrigerate-an-hold units and tilt-up skillet.
  - Convert appliances to gas.

In addition, the caterer has suggested the need to update the old main floor vestry kitchen as a “holding” kitchen for warm and cold food service and utensil storage

for the vestry; Stampfer Chapel, which was designed to swing as a social space,; and the outdoor courtyard. The lack of an auxiliary kitchen inhibits the use of these spaces, including the renting of these facilities to congregants and outside groups that could generate additional income for the synagogue. The caterer estimates that CNS could realize an annual revenue increase of between \$12,000 and 15,000. He believes that the courtyard is one of the nicest outdoor venues in the region; there are excellent “back-up” indoor facilities in case of rain.

- **Acoustics in Main Sanctuary.** This is a chronic problem in the Main Sanctuary despite efforts to correct through a combination of facility modifications and sound system improvements that especially impairs the ability of older and/or hearing-impaired congregants to participate.
- **On-Site Facility Manager.** It has been suggested that CNS hire a part-time, on-site facilities manager to monitor the use, maintenance and repair of the campus and ensure the longevity of the recent capital improvements.

**Parking.** As a result of the renovation, there are now 235 on-site parking spaces, down about 18 percent from the original 286. This loss of parking is primarily due to the increase in synagogue facilities, which encroached into the east parking lot. Installation of a mandatory stormwater treatment facility in the west parking also sacrificed parking spaces. As part of the recent renovation, the parking lots have been repaved and better lighting was installed. However, the relatively steep slope of the site makes it difficult for some congregants to move easily from the lots to the synagogue.

There usually is enough parking for routine activities and special events; generally no more than 200 spaces are needed. The exception is for the High Holy Days. CNS has reciprocal parking arrangements with the adjacent Portland Christian Center and Latvian Church, , and offers shuttle service to and from the St. Andrews Church parking lot about ¼ mile to the north on SW Dosch Road.

**Cemeteries.** CNS operates three cemeteries, the Ahavai Shalom and Neveh Zedek Cemeteries it inherited at the time of the two congregations’ merger. CNS also operates the Rose Lodge Cemetery immediately adjacent to Neveh Zedek; CNS took over its operation when its former operators no longer could maintain it. In FY 09 - 10, the cemeteries had a combined budget of \$275,000; the cemetery budget s separate from the main operating budget as all cemetery funding comes from the purchase of burial plots, burials and other dedicated funds.

Located at 9323 SW 1<sup>st</sup> Avenue in the cemetery complex near Lewis & Clark College, Ahavai Shalom has a 110-seat chapel that is currently being renovated. Located at 7925 SW Canyon Lane, Neveh Zedek’s chapel seats 75 and is in adequate condition but eventually will require improved disabled accessibility. Table II-3 summarizes the capacity of these cemeteries.

**TABLE II-3  
CNS CEMETERIES**

FACILITY	AVAILABILITY OF GRAVES					TOTAL
	OCCUPIED	AVAIL UNENCUB*	RESERVED***	NOT AVAIL**	SUBTOTAL VACANT	
Ahavai Shalom	1,882	1,619	375	234	2,228	4,110
Neveh Zedek	1,134	129	78	69	276	1,410
Rose City Lodge	671	168	128	15	311	982
<b>TOTAL</b>	<b>3,687</b>	<b>1,916</b>	<b>581</b>	<b>318</b>	<b>2,815</b>	<b>6,502</b>

\*Available/Unemcumbered means available for reservation, purchase and use.

\*\*Vacant but reserved usually for living spouse.

\*\*\*Unavailable for a wide variety of reasons including graves are unsuitable (too small or narrow), reserved for expansion of the mausoleum and chapel at Ahavai Shalom and Neveh Zedek, respectively.

With a combination of 1,916 available and 581 reserved gravesites, the three cemeteries have a total of nearly 2,500 available graves, enough to accommodate the needs of CNS members for many years to come. This is in addition to a significant amount of acreage at Neveh Zedek that has yet to be surveyed.

## **EXTERNAL CONDITIONS**

### **Status of Conservative Movement**

**United Synagogue of Conservative Judaism.** CNS is affiliated with United Synagogue of Conservative Judaism (USCJ) with offices in New York and Toronto. USCJ was founded in 1913 by Rabbi Solomon Schechter on the principle that collaboration at the congregational level was the best way to perpetuate Conservative Judaism. Currently, there are 675 affiliated congregations in North America, down 20 percent from 850 congregations in 1985, statistics that simultaneously signal a significant drop in the number of Jews who identify with the Conservative Movement.

About \$9.25 million (48 percent) of the organization's FY 2009 - 10 \$19.4 million budget was raised from assessments/dues from its affiliate congregations; this is roughly the same proportion that CNS and other congregations raise in membership dues. Last year, CNS contributed \$43,200 in membership dues, based on the congregation's size. According to USCJ's website, the basic benefits of affiliation include:

- Unified effort to uphold the right of Conservative Jews in Israel to be recognized as citizens under the controversial "right to return" law.
- Access to information and resource materials on an enormous range of topics, including membership recruitment, holiday observance and social action projects.

- Professional assistance from national staff related to financial management, computer programming, clergy and executive director recruitment, insurance, congregational ethics and other issues that face congregations on a daily basis.
- Ability to affiliate with nationally respected youth programs, such as United Synagogue Youth (USY) and Kadima.
- Educational materials and teacher training for Hebrew and religious schools.
- Access to the Rabbinical and Cantors Assemblies and North American Assembly of Synagogue Executives for clergy and executive director candidates.

The sustained loss both of congregations and adherents has put USCJ in crisis. As a result, the organization reorganized at the end of 2009 and announced a major strategic planning effort in early 2010. As summarized in a 3/10 news release:

In a precedent-breaking move, the United Synagogue of Conservative Judaism has initiated an ambitious effort to reshape itself into a powerful and effective international entity to strengthen congregations identified with Conservative Judaism. United Synagogue and Hayom, a coalition of Conservative rabbis, cantors, and congregational leaders, together have created a blue-ribbon strategic planning commission composed of lay and professional leaders drawn from United Synagogue leadership and of congregational leaders and rabbis representing synagogues of all sizes from across the continent.

**Conservative Movement Organization.** Although CNS' most direct link to the national Conservative Movement is via USCJ, the latter is one of more than 15 related organizations part of a recently formed loose umbrella group known as the Leadership Council of Conservative Judaism (LCCJ). Some of LCCJ's other member organizations include:

- Cantors Assembly
- Federation of Jewish Men's Clubs
- Jewish Educators Assembly
- Jewish Theological Seminary
- Masorti Foundations
- Masorti Olami
- Mercaz USA
- North American Assembly of Synagogue Executives
- Rabbinical Assembly
- National Ramah Commission
- Schechter Institute of Jewish Studies
- Solomon Schechter Day School Association
- Women's League for Conservative Judaism
- Ziegler School of Rabbinic Studies

Chancellor Arnold M. Eisen of the Jewish Theological Seminary, which is undergoing its own major reorganization, noted in an interview with the Jerusalem Center for Public Affairs Institute of Global Jewish Affairs in early 2010:

Conservative Jewry faces three major challenges. These concern its message, its quality control, and its structure. The definition of the message has become a priority in part because of the blurring of boundaries with other movements. Quality control is a prime issue because Conservative Judaism depends on “franchises”. It relies on local organizations – synagogues, campus, day and congregational schools, youth groups, men’s clubs and sisterhoods – to provide a quality product. Conservative Judaism has structural problems because it only has a loose umbrella body, the Leadership Council of Conservative Judaism. Up to twenty different organizations are represented there and in such a framework, it is hard to function in a unified manner. A major restructuring of the movement is underway.

USCJ Strategic Plan. In mid-March 2011, USCJ’s Board of Directors adopted the organization’s proposed strategic plan. The draft plan was released in early February, which coincided with the visit of USCJ’s Executive Director, Rabbi Steven Wernick, to CNS as part of his outreach to individual member congregations. In his visit, he praised CNS long-range planning efforts that put it “ahead of the curve” and “an excellent model” for other Conservative congregations in facing a rapidly-changing demographics and cultural milieu. Some key excerpts from the adopted plan follow<sup>3</sup>:

**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. 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 American Jewry...

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

**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...

**The Mission**

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<sup>3</sup> Strategic Plan for the New USCJ (United Synagogue of Conservative Judaism – Hayom Strategic Planning Commission (3/11)

- 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 kehillah 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 kehillah 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. While the commitment to Conservative Judaism and Conservative congregations is 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

### Local Jewish Community

**Jewish Federation of Greater Portland (JFGP).** The Portland affiliate of the Jewish Federation of America, JFGP’s mission is “to assure the building and strengthening of the Jewish community locally, nationally, overseas, and in Israel, in accordance with Jewish values.”

JFGP’s most important function is its annual fundraising campaign to support Jewish agencies and programs in the local community, abroad and in Israel. Major local recipient agencies include Jewish Family & Child Service, Mittleman Jewish Community Center, Portland Jewish Academy, Cedar Sinai/Robison Home for the Aged and several college Hillel organizations. The organization also serves as the Jewish community clearing house, providing a wide array of educational, cultural and advocacy programs, and houses the community’s newspaper, *The Jewish Review*. During the 2010 campaign, it raised nearly \$3.6 million for Israel and the local community.

Historically, there has been no formal relationship between JFGP and the community’s many synagogues, just as there has been little formal relationship between and among congregations. (An exception to the latter is the Oregon Board of Rabbis.) This is one of

the issues that JFGP's new president and chief executive officer, Marc Blattner, hopes to address. In an interview with some LRP Committee members in October 2010, he noted:

- Federation and synagogues are both in the same business of "building community."
- It is a "miracle" that CNS is maintaining its membership level, but he does not think that the congregation is immune to the national trend of diminishing numbers at congregations. What is being seen in Portland is that the number of Jews is growing but the number of people affiliating with synagogues is decreasing as a percentage of the total Jewish population.
- Judaism has an "edifice complex"; "we build bigger buildings, expecting that if we build it, they will come" but people don't want to pay for the building. And even if we can afford to build today, how will we afford to make repairs on these buildings in 10 years' time?
- What we see is "episodic" Judaic involvement, people rotating in and out of Jewish affiliation depending on their needs and place in their life cycle. This is certainly not the level of Jewish involvement of our parents' generation. Every time that a synagogue loses a family, it gets harder and harder to find a new family to replace it.
- CNS is trying to figure out how to sell synagogue life, but it's expensive, and people want to know the value and what is the price point for that value. Why are the numerous unaffiliated in Portland not joining a synagogue?
- We need to create a consumer-driven Jewish marketplace. The prevailing attitude is: If it's not worth my money, I'm done with it. The Jewish community is very good at solving yesterday's problems, but we're not good at looking 10 years in the future and planning for that.

As he noted in his inaugural speech before the Presidents' Council, Blattner said:

The Jewish communal framework has moved away from communal memory (immigration, the Holocaust, founding of the State of Israel, historic agencies) to the importance of Jewish experiences (Birthright Israel, summer camps, PJ Library books for toddlers, Jewish education) in developing the community of the future. In fact, institutional membership and organizational affiliations are down in all aspects of American society. People are seeking ways to find their own Jewish self and connectedness – not through our typical established institutions –but through peer networks and personal relationships.

To this end, Blattner recommends that the community consider such innovations as: 1).the \$1,800 Jewish Community Annual Membership Card, which would permit the holder to participate in Jewish activities/services from participating providers for one annual fee; and 2). the Jewish Birthright Card, entitling any Jewish child born in Portland to up to \$18,000 worth of Jewish services and experiences during their childhoods.

**JFGP Portland Jewish Population Study.** In April 2011, JFGP released the findings of its Portland Jewish Demographic and Opportunity Study, which had been a goal of the agency to undertake for nearly 20 years. The study was undertaken by a demographer who had conducted similar studies in many American cities. The findings and implications of the study provide information for CNS to aid in identifying and engaging in outreach to Jews all across the spectrum of involvement, identity and participation. The full Demographic and Opportunity Report (4/11) is at the JFGP's website, [www.jewishportland.org](http://www.jewishportland.org). Key findings, which are summarized in Appendix E, support JFGP's contention that the Jewish community must consider new ways of engaging Jews in community activities and philanthropy.

**Other Portland Synagogues/Religious Fellowships.** Table II-4 lists the 13 other synagogues and religious fellowships in the Portland metropolitan area including information on size, affiliation, dues' structure and other information collected by a subcommittee of the LRP Committee.

**TABLE II-4  
PORTLAND AREA JEWISH SYNAGOGUES/RELIGIOUS FELLOWSHIPS**

NAME	EST	ADDRESS	AFFILIATION	SIZE*	DUES
Congregation Ahavath Achim	1916	3225 SW Barbur Blvd Portland, OR 97239	Sephardic/ Unaffiliated		
Bais Menachem	1988	2317 SW Vermont Portland, OR 97219	Chabad Lubvitch of Oregon		None; \$1,200 donation sug.
Congregation Beit Haverim (Formerly South Metro Jewish Congregation)	1992	1111 Country Club Road Lake Oswego, OR 97034	Reform; Union of American Hebrew Congregations (UAHC)		Regular: 2% of Adjusted Gross Income (AGI) (\$800- 1,750) Senior: 1% AGI. (\$400-\$1,750).
Congregation Beth Israel	1879	1972 NW Flanders Street Portland, OR 97208	Reform; UAHC	825	Regular: \$2,200, plus \$2,000 for Building Fund payable over five years
Eastside Jewish Community of Portland (AKA Eastside Kehila)	1992	SE Foster Road at SE Lafayette Street Portland, OR 97266	Unaffiliated		
Congregation Havurah Shalom	1978	825 NW 18 <sup>th</sup> Avenue Portland, OR 97209	Reconstructionist; Jewish Reconstructionist Federation	330	Families 36+: \$2,292 Individuals 36+: \$1,404
Congregation Kesser Israel	1880s	6698 SW Capitol Highway Portland, OR 97219	Orthodox; Union of Orthodox Jewish Congregations of America (Orthodox Union)	115	Regular: \$1,200 Single-HH: \$900
Congregation Kol Ami (formerly Jewish Community Association of SW Washington)	1989	1006-B NE 146 <sup>th</sup> Street Vancouver, WA 98685	Reform; Union of Reform Judaism	125	Enhanced: \$3,000 Regular: \$1,560 Sliding: \$480 - 1,050
Congregation Kol Shalom	1993	1509 SW Sunset Boulevard, Suite 1E Portland, OR 97239	Humanist	70	Family:\$710 Single: \$430
P'nai Or of Portland	1992	9750 SW Terwilliger Portland, OR 97219	Jewish Renewal Movement	130	Suggested: 2% of AGI
Congregation Shaarie Torah	1905	920 NW 25 <sup>th</sup> Avenue Portland, OR 97210	Traditional; Unaffiliated	300	Regular: \$1,700
Congregation Shir Tikvah		621 SE 78 <sup>th</sup> Avenue Portland, OR 97213	Liberal; Unaffiliated	130	Regular: 2% AGI for incomes over \$30,000

\*Expressed in membership units.

**Case Studies of Other Large Conservative Congregations.** A subcommittee of the LRP Committee also prepared profiles of three large Conservative congregations (out of six contacted) elsewhere in the United States based on recommendations by CNS' executive director. These profiles are provided below:

Congregation Adath Jeshurun (CAJ) (Minnetonka, Minnesota). Bernie Goldblatt (Executive Director). CAJ was established in 1884, making it the oldest Conservative synagogue west of Chicago. There are 50,000 to 55,000 Jews in Minneapolis and another 28,000 to 30,000 in St. Paul. Of these, it is estimated that 9,000 families are affiliated Conservative Jews. As a result, three of the four Conservative congregations in the Twin Cities have at least 1,000 membership units.

The congregation moved to suburban Minnetonka, west of Minneapolis and immediately lost 150 membership units. Membership has now rebounded to 1,220 membership units, stable for the past 12 years. Membership will grow further when it merges with a smaller Conservative congregation in the near future. The western suburbs of Minneapolis have a strong corporate employment base and once a Jewish family moves there, it is unlikely to relocate. As a result, the membership of families with children is stable. It is the empty nesters that seem to be more mobile, either moving to warmer climates and/or to be near children and grandchildren.

Full dues are \$1,800 per membership unit, 40 percent of whom qualify to reduced dues. In addition to endowment fundraising and annual dues, CAJ looks for ways to raise money from community events that are designed to appeal beyond its membership and the Jewish community, e.g., a recent Beyoncé concert.

With regard to education programs:

- Religious education is not a trigger for membership because there is a community religious school whose students meet two days weekly; one day is spent at Hebrew School, the other at religious school on Sunday. About 95 percent of children planning Bar/Bat Mitzvah attend this school.
- There is a 120-student preschool serving infants through Pre-K. Parents can drop children off as early as 7:30 AM and can pick them up as late as 5:45 PM.
- There are also extensive youth group activities.

According to its executive director, the congregation's three greatest successes include:

- Shabbat Morning, there are 200 to 250 active Torah readers.
- The congregation has balanced its budget for past nine years.
- Stable staff with no turnover in last six years. Includes office manager, one support staff, finance director and rabbi's assistant.

The biggest challenges include:

- Endowment-building: CAJ has a goal of between \$15 and \$20 million. It has nearly \$12 million, including \$5.7 million in investments, \$5 million in planned gifts, and \$1 million in life insurance policies.
- Declining attendance on the 2<sup>nd</sup> day of holidays and Shabbat; the latter has an average of about 175 to 200 congregants.
- Creating a welcoming environment.

The congregation has recently completed a long-range plan that focuses on being more welcoming and new members' activities.

Other programmatic characteristics:

- There are about 20 lay committees for which CAJ recruits volunteers. The preschool director also has a volunteer coordinator, which she finds a necessity for encouraging participation.
- CAJ offers a variety of different services. Quarterly it does a syna-plex-style Shabbat of various services and activities. Each syna-plex event is organized around a specific theme.

The congregation also has a strong information technology base, with 35 computers, part-time systems administrator and part-time Web master, each paid \$17,000/year. More than 80 percent of the congregation's membership units have e-mail and receive a majority of their information on congregational activities electronically. This includes an excellent interactive website with interactive calendar, description of services and other important information ([www.adathjeshurun.org](http://www.adathjeshurun.org)).

Temple Beth Am (TBA) (Los Angeles, California). Sheryl Goldman (Executive Director). This 1,000-family congregation was founded in 1935. Membership is stable because it is located in a Jewish neighborhood and an estimated 75 percent of households live within walking distance. Currently, dues are \$2,750/membership unit, less for members under 35 years. About 60 percent of households pay full dues in their dues category. The congregation has a \$6 million endowment fund.

All youth education is provided by the Pressman Academy, a Jewish day school on the synagogue's campus. Headed by a rabbi, the academy serves 370 students in pre-kindergarten through 8<sup>th</sup> grade and has an early childhood center with 135 students. In addition, the academy runs a religious school with 120 students not attending day school. These students attend on Tuesday afternoons and Sunday mornings, for a total of five hours of Jewish education weekly.

TBA's three biggest challenges:

- Budget, including expansion of fundraising beyond membership dues.
- Attracting families that don't have school-aged children
- Dealing with limitations of the facility

Other characteristics:

- TBA is fully into the electronic age with a well-developed website ([www.tbala.org](http://www.tbala.org)). Most congregant communication is via the website and e-mail.
- Volunteer participation is always a challenge, but there is a dedicated corps of volunteers, a strong sisterhood, and innovative groups which are geared toward helping members in every-day life, e.g., Jewlyweds, a group for engaged or recently-married members, and Beth Am Networking Group (BANG), which helps members network for the business world.
- TBA did a long-range plan a few years ago, dividing its efforts in five categories:
  - Torah (Learning)
  - Bayit (Facilities)
  - Truma (Fundraising)
  - Avodah (Worship)
  - Yelodim (Children's education and connection)The plan has been helpful in setting the congregation's course, e.g., hired a cantor and expanding the early childhood center.

Congregation Shirat Hayam (CSH) (Swampscott/ Marblehead, Massachusetts) Marla Gay (Executive Director). CHS was formed in 2005 through the merger of two failing Conservative synagogues, which were located across the street from each other. The merger took place over 18 months to complete. Combined membership was at 500 families at the time of merger. There was a loss of 20 percent of congregants immediately after the merger, which has rebounded to 550 families today. Under the leadership of an energetic young rabbi, CSH is growing at 45 to 50 membership units a year, consisting of mostly young families and empty nesters. This growth is reflected in the religious school, which has doubled from 65 to 120 students since 2005.

Full dues are \$1,900/membership units. This does not include High Holy Day tickets that run \$150 to \$300 a person. Dues are adjusted based on age (e.g., 80 and up, \$550; 70s, \$1,300). The congregation also has reduced dues for part-time members who spend several months in warmer climates during the winter. About 85 percent of members pay full dues within their category. In addition, religious school tuition is \$995/year for grades 2<sup>nd</sup> through 6<sup>th</sup>, and \$525 for Torah School for grades 7-8. CSH's endowment fund has about \$2 million from the sale of the vacated building, the interest from which is used to help subsidize religious school.

With regard to the educational program:

- Religious School is held exclusively on Shabbat morning, it is more like "camp" with Torah study and service. The religious school ends in the main sanctuary with Kiddush to follow. There are separate activities for day school students.
- Hebrew School is offered one day a week with a choice of two days. About 80 percent attend on Tuesday, which has a more traditional program, and 20 percent on Wednesday, which provides a tutorial program and more individualized attention.

- CSH has combined its youth groups with a nearby Reform congregation, and each congregation pays ½ the salary of a youth director.

Biggest successes:

- Shabbat morning syna-plex program every week, with variety of services, Torah studies, Shabbat School and joint Kiddush lunch. The rabbi and programming have energized community. About 5 percent of membership was engaged at the time of the merger. Currently 45 percent of congregation engaged. Shabbat Services with no Bar/Bat Mitzvah draws 200 or more congregants and there are rarely less than 250 for Kiddush.
- Innovative programming for all age groups.
- Radical Hospitality/Spirituality of Welcoming.

Three biggest challenges:

- Increasing fundraising
- Recruiting board members
- Providing leadership development

Other characteristics:

- CSH uses Jvillage Network. It has a well-developed website with interactive calendar. ([www.shirathayam.org](http://www.shirathayam.org)) It provides web-casting of services and classes and has a popular rabbi's blog.
- The congregation encourages participation and volunteering. It “blew up” the sisterhood into many different groups, e.g., Rosh Hodesh group, Spirited Sisters. It engages in interfaith outreach and provides counseling for “spiritual connection.”
- Generally they are open to ideas of congregants for new programming, but new groups must come up with a plan for financial sustainability.



**Congregation Neveh Shalom  
Organizational Chart  
Spring 2010**

**A. Board of Directors**  
 --18 members elected from among the congregation (3 yr term, 2 term limit), includes Executive Committee  
 --Duties: Manages executive staff & delineates the duties of employees, governs affairs of the congregation.

**Staff Structure**

**Membership Structure**

**B. Executive Staff (Admin)**  
 --Executive Director  
 Duties: Supervises all non-religious affairs and personnel of the congregation

**C. Executive Staff (Clergy)**  
 --Senior Rabbi      --Associate Rabbi  
 --Rabbi Emeritus    --Cantor  
 Duties: Function in a ministry role to congregants, leading religious services, rituals, and rites.

**D. Executive Committee**  
 --President    --4 Vice Presidents  
 --Secretary    --Treasurer  
 --Pres-elect    --Immediate Past-Pres  
 --Pres of Men's Club    --Pres of Sisterhood  
 Duties: Primary planning body. Approve & oversee budgets.

**Department Heads**

**E. Administrative Dir.**  
 Duties: Manage office staff and bookkeeping.

**F. Education Directors**  
 --Youth Education Director  
 --Foundation School Director  
 --Youth Director  
 --Kochavim Director  
 Duties: Manage teaching/program staff, develop and facilitate programming and curriculum for students, oversee programs.

**G. Program/Dept. Directors**  
 --Membership & Development Dir.  
 --Program Directors    --Librarian  
 --Cemetery                --Catering  
 Duties: Manage the needs of their departments.

**H. Standing & Special Committees**  
 Adult Ed, Building & Grounds, Cemetery, Finance, Foundation School Advisory, Fundraising, Library, Membership, Ritual, Social Action, Youth Activities, Youth Education; Executive, Nominating, Cemetery Trust, Personnel; Other special committees.  
  
 Duties: Administrative specific functions of synagogue life, propose budgets, plan events, and conduct business.

**Support Staff**

**I. Admin. Assistants**  
 --Receptionist, --Admin. Assts.,  
 --Clergy Asst.  
 Duties: Assist in management of all office business

**J. Education Staff**  
 --School and FS Admin. Assts.  
 --Teachers & Youth Advisors  
 Duties: Assist in facilitation and management of all education activities

**K. Dept. Staff**  
 Adult Ed. Teachers  
 Custodians  
 Grounds Crew

**L. Members & Volunteers**  
 --Anyone who is Jewish and applies for membership  
 --Members pay annual dues set by the Board of Directors  
 Rights: Members have rights to vote, use building grounds and facilities, enroll children in religious school, seating for HHD services, interment in the cemetery. May be expelled by 75% vote of the Board of Directors.

### ***III. CONGREGATIONAL SURVEYS***

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#### **CONGREGATIONAL PROFILE**

A subcommittee of the LRP Committee prepared an in-depth analysis of the congregation's demographic profile, using the computerized files of member unit characteristics. Key findings include:

**Congregant Characteristics.** Based on the congregational profile:

**About 975 families with 2,700 individuals.**

- The 2,700 includes about 1,700 (61 percent) adults and 1,000 (39 percent) children.
- Gender is about 50 percent (male)/50 percent (female).
- Of these 975 households (HH), 2/3 are headed by two adults, with single adult-headed HHs accounting for the other third.

**CNS households with children.**

- About 1/2 of CNS HHs has children.
- Of HHs with children, 3/4 have two or more children, and 1/4 one child.

**CNS has many long-standing members.**

- The average HH has been a member for 16 years.
- About 1/3 of HHs joined CNS since 2004, with about 50 current members having joined in a typical year since then.
- Of long-standing members, nearly 1/4 of HHs have been members for 25+ years, and nearly one in ten members have been affiliated with CNS for 40+ years.
- 1984 was the year more current members joined than any before or since.

**CNS members are older than the general population.**

- CNS adult members are older than the general population, which probably reflects Jews' later age of marriage and lower birth rates.
- When both adults and children are counted, the median age is 44 years compared to the national median age of 37.
- In addition to our 1,700 adult heads of HHs, the congregation has 330 adult children (12 percent) who are members.

**Many are in the 50s or earlier, but lots of "20-Somethings" too.**

- More individuals are in their 50's than in any other 10-year cohort (20 percent).
- About 16 percent are in their 20s, 15 percent in their 30s, and 18 percent in their 60's.
- Another 21 percent are 70 or older, compared to 13 percent of the general population.

**CNS members are mostly from the Portland metro area.**

- About 96 percent of CNS members live in the Portland metropolitan area, with 3 percent in Washington and remaining 1 percent elsewhere.
- About 1/2 of all HH's live in six zip codes: 97221 (12 percent), 97219 (10 percent), 97225 (9 percent), 97239 (6 percent), and 97223 (6 percent), 97229 (6 percent).

## CONGREGATIONAL SURVEY

**Purpose.** A critical element of the CNS Long-Range Plan work program, the congregational survey was designed to assess congregants' general level of satisfaction/dissatisfaction, identify their needs and concerns, and determine their attitudes about a variety of issues including future growth, community-building/communication, volunteer opportunities and membership costs. Although designed as a tool for long-range planning, the survey also has revealed important information of interest to the clergy, professional staff and Board of Directors, since it has been five years since congregants' opinions have been sought in such a comprehensive manner.

**Methodology.** The survey questionnaire (Appendix F) was first developed for the original long-range planning effort in 1998, a modified version of which was used again in 2005 to assess attitudes related to kicking off the capital campaign to raise money for synagogue's renovation. With regard to the 1998 version, it was decided to mount a congregation-wide ("universal") survey by mail in which every membership unit was given an opportunity to participate. Because responses to such a survey are voluntary ("self-selecting"), it was recognized the results were not truly representative of the congregation as a whole.

Put another way, those who tend to respond voluntarily feel strongly, either positively or negatively, about the organization; by contrast, non-respondents tend to be neutral or estranged. This is in marked contrast to a "randomized" survey in which every congregant has an equal opportunity to be selected and, therefore, if the sample size is greater than 200 respondents, the results can be extrapolated congregation-wide. Nevertheless, with a high response rate, a universal survey can provide an excellent snapshot of the mood, needs and concerns of the congregation, particularly among those who are most active and committed.

This time, the committee used the new internet tool Survey Monkey™. Because CNS does not have an accurate accounting of congregants who are not computer-literate, those members must still receive communications via U.S. mail. For this reason, the first round of the survey was sent to all congregants by mail and then several times electronically to the all-congregation e-mail list.

So, 125 of the nearly 400 responses were paper responses. Several members of the LRP Committee each took several paper versions and entered responses into the Survey Monkey™ format, so that ultimately the committee could use the program to tally responses. The response rate, nearly 40 percent of the congregation, which is similar to response rates for the last two surveys in 1998 and 2005, is considered to be quite high, further reinforcing the value of this approach.

However, the Survey Monkey™ format lacks the capacity to tally/organize information from open-ended questions. Thus, the chairman of the survey subcommittee undertook a "word" analysis of these myriad responses and summarized the various topics qualitatively. The information from this analysis -- of both the quantitative and qualitative information provided by congregant respondents -- is presented below.

**Findings.** The first section deals with the results of the close-ended questions that formed the first part of the survey instrument. These results were generally straightforward to interpret and were based upon a statistical analysis of the data. The second set of findings examines the responses from the open-ended questions near the end of the survey.

### **Closed-Ended Question Results**

1. With regard to the demographic characteristics, respondents are 35 years of age or older (93 percent), 79 percent are married, 34 percent have children 18 years of age or younger at home, and 85 percent live in Southwest Portland, Northwest Portland, or the western suburban areas. With regard to length of membership, results are as follows: less than five years (17percent), 5 to10 years (22percent), 11 to19 years (19 percent), and 20+ years (42 percent). Under-represented were congregants who've been members for less than five years and families with children at home.
2. When asked for all the reasons why a respondent joined CNS, "To meet religious needs" is the most frequently given response, followed by "Identification as a Conservative Jew,,"; "To meet children's educational needs,,"; and "Family. In comparison, in the 1998 survey results, to meet religious needs was the most frequently given reason, followed by children's educational needs and identification as Conservative Jews, so the top reasons for joining have not changed much.
3. Asked to select what about CNS enriches their family members' lives with no limit on the number of responses, respondents overwhelming selected "religious services/programs," followed closely by "Interaction with clergy." Four other aspects -- "culture of Conservative Judaism," "social programming/ activities," "Bar/Bat Mitzvah training," and "volunteer opportunities" -- are selected by between 25 between and 35 percent of respondents.
4. Congregants rated their level of agreement with a selection of attitudinal statements, using a scale of 1 to4, based on the selection of the following: Strongly Agree (4), Agree (3), Disagree (2) and Strongly Disagree (1). Respondents feel that the office staff is courteous and responsive to their needs (3.4), that they feel welcome at CNS (3.3), CNS helps them feel connected to Judaism (3.3), and that the rabbis are accessible and responsive to their family's needs/concerns (3.3). Lower scoring responses include: CNS is an important point of social interaction and friendships (2.9); and CNS helps make them feel connected to the Conservative movement (2.9).
5. With regard to religious practices, almost all respondents hold or attend a Seder (89 percent), most have been to Israel (73 percent), have had a Bar/Bat Mitzvah (63 percent) and regularly light candles on Friday night (57 percent). Twenty-two percent have a family member that converted to Judaism, 18percent have lived in Israel, and 5 percent are Shomer Shabbat. Nearly 90percent of respondents consider themselves Conservative Jews.

6. Ninety percent of respondents say they are at CNS at least once a month. But this group is not attending the same service; rather, they self-select to attend a number of different types of services – appealing to families with young children, those in search of more traditional worship and a service with a more meditative quality -- both on erev Shabbat and Shabbat morning. This underscores the degree to which a larger congregation can offer a menu of services for congregants with different needs.
7. Forty percent of respondents with children 18 years and younger at home say their children attend a Jewish summer camp. Approximately one-quarter of respondents who are parents send their children to at least one of the following educational programs at CNS: Foundation School, combined three-day Hebrew school, regular two-day Hebrew school or religious high school. Another 15 percent send children to Portland Jewish Academy (PJA), where their children obtain their religious and language training; this is up from 9 percent a decade ago. This level of involvement in the synagogue's educational offerings is significantly lower than in 1998 when two-thirds of these families had children in Sunday school, 30 percent in Hebrew school, 40 percent in Bar/Bat Mitzvah training and one-third in religious high school<sup>1</sup>.
8. Of those who responded to the survey, about one third volunteer their time as a member of a committee, while one-fifth say they either have no interest in volunteering or time to do so.
9. When asked which groups within the CNS family would benefit from additional programs and services, respondents most frequently name adults (35-64), young adults (18-34), and "empty-nesters," followed by seniors (65+). In 1998, by contrast, most respondents desired additional programming for teenagers and youth (K-8), followed by singles, seniors, and inter-married couples, empty-nesters and young families. One possible explanation is that programming for children and teens has increased over the past 10 years but the under-representation in the survey of young congregants with children also may have skewed the results.
10. In 1998, when asked where additional funds should be spent if they became available, respondents listed hiring more clergy and expanding both youth programming and synagogue facilities, wishes that since have been fulfilled. In the current survey, most respondents ask for the reduction of the cost of existing education programs, followed by the subsidization of youth trips to Israel and expansions of adult educational programs. These are followed by calls to expand lecture series/other cultural arts, youth education/programming and the synagogue's endowment fund.
11. Congregant satisfaction with CNS educational programs has declined significantly in the past decade. For example, in 1998, Foundation School rated 4.5 (where 5.0 is the highest rating) and B'nai Mitzvah at 4.0. Today, both rated between a 3.3 a 3.4. It's likely there is a correlation between lower satisfaction ratings and the smaller

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<sup>1</sup>Responses are not additive because a family can have children at different ages who attend different educational programs.

proportion of students attending CNS religious education programs. Regarding satisfaction with educational programs/activities, and rated using the scale above, CNS combined three-day Hebrew school, religious high school (7-12) and the CNS religious school (3-6) scored in the 2.7 to 2.8 range. All other educational programs were in the 3.3 – 3.8 range.

13. Regarding satisfaction with the physical facilities, the new Stomper Chapel is given the highest rating, 3.8, followed by the new administrative offices, renovated exterior appearance and relocated Zidell Chapel, all of which scored in the 3.5 to 3.6 range. Ranking less satisfactory are restrooms (3.2), parking (3.0) and the kitchen (2.8).
14. Regarding respondents' technology usage, virtually all respondents (98 percent) use e-mail. As further indicators of technological sophistication, the majority pays at least some of its bills online; uses the CNS website and frequents social media sites, such as Facebook and Twitter. Most respondents are online at least once per day.
15. Concerning satisfaction with CNS communications, the results indicate a great need to improve communication with and for congregants.

**Open-Ended Question Results.** Using a topic word methodology, the key findings for the five open-ended questions are presented below. This includes the first four questions:

- What CNS can do to make volunteering easier?
- How can communication with congregants be enhanced?
- What do you like most about CNS?
- What do you like least about CNS?

The results from the fifth open-ended question, which asked respondents to add any other comments, were combined with the results for the first four questions.

How Can Volunteering Opportunities be Expanded? Asked to identify the factors that would make volunteering at the synagogue easier and more attractive, respondents say:

- In general, staff and committee chairs seeking volunteers from the CNS community need to improve outreach. Although it would be helpful to have more information about volunteer activities, many respondents prefer to be asked personally to volunteer, either through a phone call, e-mail or in person.
- Some respondents say they would be more likely to volunteer for one-time-only events and shorter-duration projects rather than taking on long-term commitments. In addition, given congregants' busy schedules, flexibility in scheduling volunteer activities for different times of the day and week would be helpful in recruiting volunteers. In addition, respondents desire more effective volunteer leaders, as well as better support from synagogue staff and clergy.

- The most common response regarding why people don't volunteer is lack of time. Others reply that they live too far from CNS and/or do not have transport to events. This alone presents a perfect volunteer job: offering others rides to the synagogue.
- A number of respondents report that they already spend time volunteering, feel the effort is worthwhile and think that CNS does a good job encouraging volunteerism.

#### How Can Communication Be Enhanced?

- Several respondents desire the bi-monthly Chronicle return to monthly publication.
- Based on the number of responses received, the CNS website needs upgrading to make it more user-friendly and comprehensive. Suggested improvements include:
  - An updated and more easily understood calendar of events;
  - On-line bill paying for membership dues, events, and donations<sup>2</sup>;
  - A dedicated webmaster or methods for staff to easily update the website;
  - Search functionality;
  - Improved format both visually and functionally.

Based on this input, CNS should consider retaining a web design firm or hire a dedicated staff member to revise and update the website.

- Many respondents would like to see increased use of e-mail in lieu of paper mailings. However:
  - E-mail does have the potential to be over-used.
  - Regularly-occurring e-mails should be delivered on a predictable schedule.
  - Other electronic communication such as Facebook and Twitter also may have a place but should not be over-used as this may result in electronic "fatigue."

In general, CNS staff should continue to focus on follow-through and provide timely replies. Foremost among specific suggestions is the need for CNS to develop a unified communication strategy; ideas include convening small groups to discuss issues, providing a suggestion box and/or bulletin board by the office and continuing to conduct surveys, such as those related to the cantorial search or long-range planning efforts.

**What Congregants Like Most About CNS.** If asked to provide a single word or short phrase about why they like CNS, a list might look like this: "friendly," "warm," "welcoming," "sense of belonging," "big tent," "inclusive," "comforting," "familiar," "supportive," "caring," "enthusiastic," "progressive," and "engaged." Respondents note that the synagogue is a focal point for their Jewish lives, that the clergy provides them with words of wisdom and that they have a deep connection to the synagogue as a religious sanctuary.

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<sup>2</sup>CNS is in the process of incorporating a new component into its computer system that will allow for on-line bill paying and event reservations.

Respondents also like the variety of programs, services, educational offerings and renovations at CNS. The Downstairs Minyan was the most popular religious service, followed by Chik-Chak and Keva. Many respondents say the Foundation School is their favorite educational program at CNS, while also mentioning Hebrew immersion, youth and adult education programs. There is widespread agreement that the recent renovations to building and grounds have been a success; respondents especially enjoy the new Stampher and Zidell chapels.

What Congregants Like Least About CNS. The cost of membership tops the list as related to frequent fundraising appeals, pricing structure for membership dues and programs that have a member/non-member pricing. Some respondents also note concerns about some of CNS' spending decisions, current staffing levels, amount of programming and operational efficiency, and, thus, question whether these are related to the congregation's current financial woes. Other related issues include concerns about poor management and leadership, lack of business savvy and a desire to see the synagogue return to a 'back-to-the-basics' focus to control costs.

The largest number of complaints about CNS programming relates to the Hebrew/Sunday school program. Respondents find the program disorganized and uninspiring, have concerns about the leadership and criticize inadequacy of communication with parents. Several respondents suggest the religious education program needs to be completely revamped. A key concern about Foundation School is the program's short hours of operation, creating problems for working parents.

The process by which Cantor Linda Shivers' contract was not renewed also is a subject of criticism by some. Other comments suggest that the clergy are not available or responsive enough to congregants' needs, sermons are overly long or not interesting, and that services are not engaging, well-attended and/or have too much music.

Regarding CNS' facilities, several comments relate to issues that are difficult if not impossible to address, such as the synagogue's location, steep parking lot, outdated 10 Commandments feature on the west side of the sanctuary, and Trimet's bus schedules. However, several respondents make suggestions that can be addressed, including improving the main sanctuary's sound system, upgrading older restrooms, installing diaper-changing tables, providing Shomer Shabbat towel dispensers and increasing library hours.

Finally, in terms of "intangibles," many respondents feel CNS has grown too big, causing these congregants to feel less connected. Other common responses about the mood of CNS suggest the congregation is not "friendly" or "warm" enough, people can "feel unwelcome," the congregation needs "more member participation," it can be "hard to make friends given the cliques and the 'in' crowd," and the congregation "tries too hard to be everything for everybody." Other terms used by respondents to label the congregation include: "too Reform," "too religious," "too mainstream," "too institutional," and "not progressive enough." Obviously, many of these sentiments are contradictory.

## RESIGNED MEMBERS SURVEY

**Methodology.** CNS Director of Membership Services/Development provided an LRP Committee subcommittee a list of recently-resigned membership units, eliminating those who had left CNS to move to another community. It remained unknown to the three-member subcommittee members as to why the remaining 14 interviewees resigned their membership. The subcommittee split the list and interviewed by telephone and/or email one or both adults in each household using an approved list of questions.

**Findings.** Key findings are summarized below.

- In a congregation as large as CNS, it is difficult to meet every congregant's expectation; individual congregants are not aware of the enormity of such a task and largely focus solely on how they personally are treated.
- The single most important factor contributing to satisfaction with membership one's relationship with clergy, both personally and spiritually.
- Parents' relationships with educational staff are key and can be a major source of dissatisfaction.
- Volunteers need to feel appreciated and recognized for their efforts. (This is important because participation in synagogue affairs is a major gateway to feeling connected and, thus, satisfied and happy in the community.)
- If at all possible, staff and clergy should reach out to unhappy congregants at the earliest possible moment, to learn of and address their concerns. Unfortunately, such congregants may withdraw from participation and/or resign before CNS personnel know there is a problem. At the very least, there should be exit interviews with *all* resigned members -- in the hope they will reconsider and, barring that, aid in "lessons learned."

## FOCUS GROUPS

**Purpose.** To augment the findings from the congregational and resigned members' surveys, the LRP Committee decided to hold a series of special-interest focus groups of up to 10 congregants to discuss their opinions, needs and concerns in an in-depth manner. Such information is qualitative in nature and cannot be extrapolated to the congregation as a whole.

**Methodology.** Three focus groups with between 7 and 10 participants were held on the following topics: Community-Building (CB), Youth Education (YE) and Focus on the Future (FF). The focus group facilitators worked from a common discussion guide with the following questions:

- When you hear the subject [CB, YE, or FF], what three words best describe it?

- Given how we have described our topic today, now let's look into the future...five to 10 years from now. Let's describe our ideal program. What does it look like? What is different from today? The same? Why? How can we get there?
- Considering this ideal future, what should the congregation do today and in the near future to get there?

### **Selected Findings**

**Community-Building.** Although unintended, the group included mostly older congregants, including past board members and one past long-time employee. Concerns raised include:

- Lack of programming for those beyond the empty-nester stage, making it hard to make new connections/participate with younger/newer members. This constituency expressed a desire for additional opportunities for involvement and making connections across all age groups.
- The synagogue needs to be more welcoming, whenever anyone enters the building. This includes increased efforts by clergy, staff, congregational leaders and other congregants to provide a more "personal touch."
- What is the glue that holds the congregation together?
  - Friendship
  - Religious identification and life-cycle event celebrations
  - "Home"
  - Cultural identification and togetherness; social cohesiveness
  - Keeping current members happy, even before recruiting new members

The group then envisioned CNS in 10 years:

- More effective/more outreach to community to serve those who cannot physically get to services, such as Rose Schnitzer residents.
- More welcoming clergy and current members to service-goers.
- Consider the "synaplex" concept, which on Shabbat would offer myriad programs and services within the synagogue for numerous constituencies, culminating in a Kiddush lunch, ideally, in which all present participate.
- Improve congregant leadership development.
- With regard to membership:
  - Should membership be limited, or grow to roughly 1,200, the projected physical capacity of the building?
  - Bringing in and maintaining members will require a stronger education component and warmer/more-welcoming clergy and staff.

- Offer stronger programming for all family members post-b'nai mitzvah and after the initial free year of membership offered to newly marrieds.
- Members: It's incumbent on members themselves to involve themselves and others in synagogue life. All new members must identify themselves, so established members will know to approach and welcome them.

Some selected first steps include:

- Clergy: Spend more time with worshippers, especially before and after services.
- Train staff for a more friendly reception of members and all who come through CNS' doors.
- CNS executive director, board president and executive committee must have a higher profile; board members should wear name tags.
- Improve communications so that all constituents in and out of CNS are informed of activities and services. For example, consider establishing a link on the CNS website to the JFGP's Community Calendar.
- Continue calls and visits from board members to all other members for holidays, as well as "thank yous" for donations.
- Conduct special services or offer special announcements thanking/praising those who've given much of themselves/their time to the synagogue.
- Employ accessible and low-cost opportunities to bring folks together.

**Youth Education.** The composition of this focus group included a group of mothers, half of whom have children in Foundation School, the other half of whom have children in the pre-B'nai Mitzvah religious education program. Concerns of participants in this focus group include:

- For their children's education, they want to:
  - Build Jewish identity and formal Jewish learning
  - Values
  - Comprehensive education, ages birth through 18, encompassing religion and language
  - Inspiring
  - Connected
  - Enjoyable
- Need to provide continuity from program to program, including, for example, religious school, camp and youth group.
- How do we make Judaism the center of our children's lives?

- Consider Saturday (Shabbat) as community education day with adults and children participating.
- Concerns: Time commitment, expense.
- Improve communication with Religious School parents. Foundation School families report communication generally is good.
- Provide a seamless transition between Foundation School and Religious School; think of Foundation School as feeder program.
- Need longer hours in Foundation School to accommodate working parents.

What is the ideal Youth Education program:

- Inclusive model, incorporating language, religious enrichment, culture.
- For children to age 5: combine Foundation School with Notz'tzim and Shoreshim.
- Communication clear and user-friendly.
- No "nickel and diming" -- one fee covers everything.
- Need a "Synaplex"; make it something that the whole family can participate in together.

Some selected first steps include:

- Reorganize and re-energize committee to provide more parent input into educational program and hiring of staff.
- Hire volunteer coordinator.
- Establish communication pathways - e-mail group, blogs, list-serve - to keep parents in the know.
- Specific targets and goals
  - Would like to see a published curriculum.
  - Leadership of synagogue needs to be more open.
  - Address transportation needs for parents/kids, to and from Hebrew School.

**Focus on the Future.** This group was composed of nine congregants of various ages and interests. Participants used a variety of adjectives to describe the atmosphere they wished to see at CNS: "organic," "vibrant," "dynamic," "thrive," "inspirational," "enduring," "evolving," "accountable," "children," "clergy," "transparent," "inclusive," "community," "tzedakah," "respect individuality," "home," "planning," "challenging," "politics," "accessible" and "adult learning."

Two themes emerged from this discussion:

- Life-long learning, including:
  - Multi-generational (parent/child, grandparent/child).
  - Not just from rabbis.
  - Recapture lost heritage.
  - Making it attractive; children must want to be there.

- Financial:
  - What do I get for my dues?
  - Membership as a commodity.
  - Need for new dues model.

The group then envisioned CNS in 10 years:

- Involved in tzedakah at all ages.
- Accommodating different needs.
- Inspirational experience.
- Uniform sense of belonging. *Yiddishkeit*.
- Community – Learning – Worship.
- Worship with music, i.e., getting people out of their seats.
- Building used to full capacity.
- Better communication ensuring none falls through the cracks.
- Sharing resources with larger Jewish community.

Some selected first steps include:

- eSuggestion Box with feedback.
- Remove redundancy, streamline staff.
- Schedule additional, fun social events, such as dances, picnics, holiday celebrations.
- Connect different generations through programming.
- Establish committees by zip codes, such as tzedekah projects (meals for the ill, carpools).
- Advertise building space to lease to non-CNS groups.
- Become social change agent for larger community.
- Expand 1<sup>st</sup> Friday music service with goal to make it more participatory.
- Develop synagogue theme-of-the-month.
- Better use organization/clubs/committees to hold members’ interests.
- Do a better job of telling congregants what they are getting for their dues.

## OPINION LEADERS’ PERSPECTIVES

**Purpose.** To assess the opinions, concerns and suggestions of CNS’ opinion leaders including clergy, senior staff and lay leadership.

**Methodology.** Members of the LRP Committee’s steering committee conducted 12 interviews with the following CNS opinion leaders:

- Rabbi Daniel Isaak
- Rabbi Bradley Greenstein
- Canter Deborah Bletstein
- Executive Director Fred Rothstein
- Administrative Director Debbi Villani-Allen
- Director of Membership/Outreach Wendy Kahn
- Director of Education Susan Bernstein
- Board President Doug Lenhoff
- Past President Sandy Axel
- Board Members of the executive committee Steven Kahn, Jason Kaufman and Todd Friedman

The responses of interviewees have been analyzed and to protect confidentiality are reported below in the aggregate.

### **Findings**

1. Respondents note several reasons why they are employed or volunteer at CNS. These include:
  - Small-town feel, wherein the institution feels both big and small at the same time.
  - Congregants spiritually hungry and open-minded.
  - Wanted to be a change-agent.
  - Opportunity to move from a smaller congregation to a larger one.
  - Commitment to the Conservative Movement.
  - Opportunity to serve the congregation to which our family has been long-time members.
2. Several respondents note concern about CNS' economic stability, including what is shaping up to be chronic shortages in the operations budget; the nearly \$2 million shortfall in the capital campaign; and the under-funding of the endowment fund. Representatives of the board and senior management want to retire the \$34,000 debt in the operations budget accrued over the past two fiscal years; retire the capital campaign debt; and then move onto an endowment campaign to increase from \$2 million to \$10 million.
3. From the fiscal perspective, this group sees 1,200 membership units as the ideal size. The congregation's membership for the past several years has been stable at between 960 to 990 units.
4. There are many challenges to a congregation of this size:
  - It is difficult to create personal space for individuals.
  - Congregants' diversity - in terms of interests and demographics -- places enormous burden on clergy and staff..
  - Due to the congregation's size, it has become necessary to respond to problems and complaints in as short a time as possible. The number of options for congregants and the synagogue's size have led to some disgruntled members quitting ever before the clergy and staff are aware that there is an issue.
5. With regard to the staff, clergy, staff members and/or lay leaders note:
  - Staff is highly regarded, professional and cohesive.
  - Clergy and senior managers are badly stretched; this raises the question as to whether CNS has the human infrastructure to accommodate another 200 membership units.

- Staff responsibilities are not clearly defined resulting either in unnecessary overlap or gaps in response. A rigorous evaluation of the current organizational staff is warranted to clarify roles/responsibilities, reduce redundancy and increase efficiency.
  - Ironically, because the staff is so capable, this may hinder congregant participation.
  - CNS has inadequate computer hardware and software capability, which increases the burden on staff. If the congregation's technology capacity were significantly upgraded, staff would have more time for personal congregant interactions. This also would result in a significant savings in paper and postage.
6. Several staffing needs are indentified:
- Full- or part-time professional technology specialist.
  - Full-or part-time development officer; currently, the Director of Membership/ Development both recruits new members and fundraises, which, with regard to new members, poses a conflict of interest.
  - Part-time on-site facilities manager.
7. With regard to facilities, the recent renovation/expansion has been a great success both aesthetically and functionally. The synagogue now likely has the physical capacity to accommodate a larger congregation. However, significant upgrade of the main kitchen and renovation of some restrooms remain important yet unfinished projects.

## **IV. SUMMARY OF FINDINGS**

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**Introduction.** On December 5, 2010, 50 CNS leaders, including members of the Board of Directors, Past Presidents' Council, Long-Range Planning (LRP) Committee, other standing committee chairman, senior staff and clergy, attended a three-hour leadership workshop to review the findings of the LRP Committee to date and establish priorities for further analysis and ultimate recommendations. Based on this work, workshop participants identified three priority topics for further work by the LRP Committee. Not surprisingly, these are strikingly similar to the issues raised in the all-congregation and opinion leaders' surveys described in Chapter III. These include:

- Community-Building
- Jewish Education
- Financial Stability

In addition, as a result of input by all participants, a fourth topic, Information Technology, is to be integrated into the other three elements. Having established these three planning elements as the framework for the Long-Range Plan, the LRP Committee has developed findings for each element, based on its internal and external research. These findings are presented below.

### **Community-Building**

#### **In General:**

- Research shows increasingly less likelihood for Americans to affiliate with organizations. In Jewish communities across the country, this is reflected in declining membership in synagogues, community centers and other organizations, as well as a decreasing commitment to Jewish philanthropy. These tendencies were reaffirmed in the recent community population survey sponsored by the Jewish Federation of Greater Portland.
- For synagogues, this has meant fewer new members and/or members who only join for a specific purpose -- e.g., their children's education -- and then disaffiliate. The perceived high cost of synagogue membership drives this decision as does the relevance of programs and services.
- Despite the increasing disinclination to affiliate with a synagogue, establishing a spiritual, cultural and social community guided by Jewish precepts for which a congregation can serve as home base is considered to be of high value.
- United Synagogue of Conservative Judaism (USCJ) has been hard hit by this trend, declining from 850 affiliated congregations in 1985 to 675 in 2010, a 20% decrease, with a concomitant decrease in members.
- In the face of the continuing decline in synagogue membership in the Conservative and other movements, the Jewish community in general, and synagogues in particular, are struggling with how to balance *outreach* of unaffiliated/disengaged Jews and *in-reach*, better fulfilling the needs of those who choose to be engaged.

Some see outreach as a way to expand the pool of potential members to stem this decline. Others claim that efforts to woo those who choose to be disengaged are at the expense of those who have a demonstrated commitment to living Jewishly. Most agree that achieving this balance is challenging.

### **CNS-Specific:**

- Unlike other large USCJ-affiliated congregations, CNS has managed to maintain its membership at between 960 to 990 family units for more than a decade. This only has been achieved by replacing every resigned member unit with a new one. Disallowing for death and relocation, a number of resignations are due to dissatisfaction for various reasons. Had it retained even a small fraction of unhappy members, CNS would have grown modestly. . The fact that the congregation has not grown suggests that it is not immune to current trends that have affected other Conservative congregations more significantly.
- According to various surveys undertaken for this project, size matters. For those who are generally satisfied, the size of the congregation is seen as beneficial, supporting a wide range of programs and services, strong professional staffing and quality facilities without sacrificing warmth and friendliness. For those respondents who tend to be dissatisfied, the size of the congregation adversely affects intimacy, access and personalized attention.
- Good communication is the key, according to survey respondents:
  - CNS needs to develop a broader communication strategy that focuses on providing more personal contact with members, increasing responsiveness, encouraging volunteerism and fostering more transparency about congregational decision-making.
  - As the congregation becomes more computer-literate, there is an increasing desire that CNS improve its reliance upon electronic communication with its members.
- Volunteers are a precious commodity and desire to feel more appreciated that they are currently.

### **Jewish Education**

#### **In General:**

- Synagogue-based Jewish education encompasses education of children from birth to 18 years and continuing education for adult congregants.
- The desire to provide Jewish education for children in general and in preparation for B'nai Mitzvah in particular is a major impetus for young families to join a congregation, as synagogue membership typically is a requirement for access to education programs.

- The traditional two-afternoon/week Hebrew School and Sunday morning religious school model has become increasingly problematic for working families and busy children who have myriad after-school and weekend activities. In response, changing models of education delivery are being instituted in some congregations, e.g., reducing the program from three days to two days, and/or shifting the traditional Sunday School to Saturdays some or all of the time, when it can be combined with other Shabbat activities.
- Encouraging children to remain in Jewish education programs following B'nai Mitzvah is an uphill battle. Participation in Jewish camping and/or trips to Israel have been shown to reinforce teens' sense of Jewish identity and commitment.
- Adults also are desirous of on-going educational opportunities. These can be provided in a variety of ways and settings, including personal tutoring, classes, lectures, film festivals, social/environmental action events and study weekends. Many Jewish communities have created coordinated adult education programming from several providers including synagogues, free-standing schools (e.g., Florence Melton), Jewish community centers, local colleges and other institutions.

#### **CNS-Specific:**

- According to the congregational profile, CNS has a total of 2,700 members, 1,700 of whom are adults and 1,000 are children up to the age of 18. Half of all CNS membership units have children.
- CNS has developed an innovative three-day combined Hebrew/religious school program and rigorous training requirements for B'nai Mitzvah. It also has established a comprehensive education program for high school students after B'nai Mitzvah. In the 1970s, CNS and a Seattle synagogue established Camp Solomon Schechter, where many CNS children and teenagers attend summer camp.
- Currently, 160 children are enrolled in the three-day combined education program, where there is capacity for 230 students. The Foundation School has the capacity for up to 90 pre-schoolers but only 70 are enrolled. The Hebrew high school has maintained enrollment in the range of 110 to 125 students. Despite the fact that CNS membership has remained static with an average of about 975 families, participation in youth education at all levels has declined. This is likely due in part to many CNS families who have children enrolled at the Portland Jewish Academy (PJA) where Jewish education and Hebrew language study are part of the regular school day.
- According to surveys undertaken to support the Long-Range Plan:
  - Although generally complimentary about the range of educational opportunities for all ages, there are complaints about the youth education program. These include concerns about cost; schedule; program content and rigor; staff organization and responsiveness; and parent/staff communication. This issue warrants immediate attention and, indeed, the newly-hired Director of Congregational Education already is undertaking a major revamping of youth education programming.

- Although there is high satisfaction with Foundation School, several respondents request longer hours, and/or hours that better match working parents' needs. The program intends to expand its hours to mid-afternoon in the 2011/12 school year as a first-stage gesture to make the program more attractive.

### **Financial Stability**

#### **In General:**

- As part of its recently unveiled 10-year strategic plan, USCJ concludes the traditional *membership* model that has served the Conservative movement well for over 100 years must be replaced with a *purpose-driven* model. If implemented, congregations must figure out how to fund themselves with less reliance upon membership dues, which typically make up about 50 percent of the annual operational budget. This does not necessarily mean a wholesale abandonment of the traditional membership model but does signal that congregations must broaden their funding base.
- For its part, USCJ concludes it must better articulate its message about what it is to be a Conservative Jew and provide a more relevant menu of services, programs and support to affiliated congregations. On the financial side, this includes acting as an administrative services organization that provides group discounts on purchase of goods and services, e.g., insurance, and offering technical assistance in human resources, technology, Jewish education and leadership development for which affiliate congregations have inadequate in-house expertise. USCJ also recognizes that if it fails to provide value to its constituent congregations, the total number of Conservative congregations will continue to decline.

#### **CNS Specific:**

- With regard to its operating budget, CNS' budget for the recently-completed Fiscal Year (FY) 2010/11 was nearly \$2.6 million. Other observations include:
  - Major sources of income include membership dues (49 percent), pre-school/youth education fees (22 percent) and fundraising (9 percent). Personnel accounts for 43 percent of expenditures, followed by non-capital building maintenance (12 percent), educational program expenses (12 percent) and office expenses (9 percent).
  - Over the last few years, average income increased slightly less rapidly than expenses. As a result, CNS ran a deficit in the past three years of about \$40,000.
  - CNS engaged in a capital campaign in mid-decade to raise \$9.7 million for its major facility renovation/expansion completed in 2008, for which there is currently a \$1.6 million shortfall. The latter is being financed through a mortgage that further burdens the operating budget. Due to the current recession, it has been very difficult to do additional fundraising to retire the debt.
  - The congregation's endowment fund contains \$2.3 million. Moreover, investment income from endowment funds is down due to the recession,

creating shortfalls in the operating budget. Once the current operating fund deficit and the remaining capital campaign debt are retired, CNS plans to launch a major endowment campaign with a goal of raising another \$7 million. This would bring the endowment to at least four times the size of the annual operating budget, considered to be a prudent rule of thumb.

- Obviously, there is strong incentive for CNS to increase its membership even as the trend away from being a membership-based organization becomes more pronounced. Congregational lay leaders and senior managers suggest the congregation's optimum size is 1,200 membership units, up 20% from the current level. As part of its assessment, the LRP Committee has concluded the facility is large enough to support such an increase, although it is not clear whether it has adequate staff capacity to do so.
- As an alternative, the congregation could lease facilities and provide organizational support to another Jewish congregation of 200 membership units or less, creating opportunities for joint programming and sharing staffing costs, or merge outright with another congregation.
- In the recent congregation-wide survey, respondents named the high cost of membership as one of their three top concerns. Younger families noted that in addition to membership dues, they pay substantial fees for their children's religious education, the combination of which stresses them financially. Others complained about cumulative impact of other fund-raising requests. The implication of this research underscores increasing demand on the part of congregants for a more broad-based funding strategy and increased relevance and value in programs and services.
- Based on the internal survey and findings at the national level, it will be increasingly difficult to fund CNS in the traditional manner. This suggests synagogue leaders need to take a fresh and unbiased evaluation of its financial challenges including restructuring staffing and programs; developing a new membership fee structure that encourages existing non-member users to become members; identifying additional sources of revenue; improving operational efficiencies; and reinvigorating fundraising focused on core programming.

## V. RECOMMENDATIONS

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### **Implementation Strategy**

**Planning Elements.** The recommendations of the CNS Long-Range Plan (LRP) are presented below in three inter-related planning elements described in Chapter IV:

- Community-Building (CB)
- Jewish Education (JE)
- Financial Stability (FS)

A fourth element, Information Technology, is incorporated throughout the three elements above, with the most detailed recommendations found in Financial Stability (FS-Recommendation C).

It is proposed the plan be implemented over the next 10 years, in three time segments:

- Short-term (Years 1 - 3)
- Mid-term (Years 4 - 6)
- Long-term (Years 7 - 10)

**Implementation Agents.** The CNS Long-Range Plan will be implemented by existing structures within the congregation, including the Board of Directors, clergy, professional staff and standing committees. The LRP Committee proposes to add two additional implementation agents. The first of these is establishment by the Board of Directors of a Long-Range Plan (LRP) Coordinating Committee for the lifetime of the plan. This coordinating committee is the heir of the LRP Committee, whose work will end when the plan is adopted in September 2011. Meeting at least quarterly, the LRP Coordinating Committee will be responsible for coordinating, monitoring and reporting progress toward implementation.

The second implementing agent would be a broadly-based congregational task force to study a recommendation in the United Synagogue of Conservative Judaism's (USCJ) strategic plan that congregations move from the traditional membership model to one of participation and engagement. The USCJ challenge is so potentially transformational that substantial additional study and reflection is warranted. This issue also crosses through all three planning elements potentially affecting CNS' sense of community, educational programming and financial planning. The description and duties of the task force are presented in Financial Services (FS-Recommendation A), because this makes the most organizational sense. The task force will consider this issue from cultural, programmatic, institutional and operational, as well as financial perspectives, so its recommendations will cut across the entire Long-Range Plan.

The congregational task force also will be charged to study on-going proposed plans by the Jewish Federation of Greater Portland (JFGP), i.e., Jewish Community Annual Membership Card and/or Jewish Birthright Card., that also challenge the traditional membership model used by synagogues and other Jewish organizations/institutions.

It is noted that a significant number of the 67 recommendations that follow are designated as short-term or on-going. There are three reasons for this:

- Those that are short-term or underway include the proposed major re-vamping of the website; increased emphasis on membership retention; increased outreach beyond the synagogue's walls; efforts to expand the funding base; and major revitalization of youth education.
- As a complex organization, CNS has significant capacity to work on several initiatives at once. The keys to a successful outcome are an agreed-upon set of guiding principles and coordination of efforts, the latter the responsibility of the Executive Director with the aid of the proposed LRP Coordinating Committee.
- Many of the following recommendations are not necessarily *additions to* the workload of staff, clergy and committees but rather *alternatives to* "business as usual".

### **Guiding Principles**

Based on a synthesis of all of its work during the planning process, the LRP Committee recommends the following Guiding Principles, which provide the philosophical framework guiding implementation of the Long-Range Plan:

1. Endorse the principles that define Conservative Judaism and make them the underpinning of all we do.
2. Acknowledge the possible shift in the traditional membership model to a model of participation and meaningfulness, as suggested in USCJ's recently-adopted strategic plan (3/11). This may require development of an alternative funding model where there is a range of ways for participants to pay for services and programs from which they gain value. The nature and extent of this major cultural and organizational shift should be evaluated further.
3. Focus on becoming the best organization that CNS can be for its current participants:
  - Respond to the needs of our most engaged congregants to increase their personal and collective satisfaction, commitment and participation.
  - Improve "in-reach" to the moderately engaged by developing programs, services and communication strategies tailored to their needs and concerns, thus, encouraging their increased involvement and satisfaction.
  - Honor the decision of congregants who choose to participate only occasionally and keep them fully apprised of CNS programs and activities.
4. Attract and engage new participants, i.e. outreach.
  - Recognize that our congregation provides a spiritual, emotional, cultural and social home. Focus on celebrating our Jewishness with prayer, music, joy and friendship.
  - View the synagogue building as the physical center of our community, but not necessarily the sole venue of our outreach, programs and services.

5. Celebrate that one of the benefits of our size is the diversity of its participants and the capacity to provide a wide range of programs, services and support. At the same time, strive to serve adequately the needs of individuals and special constituencies based on interest, age, lifestyle and life-cycle status. Actively work to remove barriers that impede a sense of friendliness, warmth and intimacy that may be an unintended consequence of our size.
6. Serve as a model for other USCJ-affiliated congregations for long-range planning at the grass-roots level.

### **Planning Questions**

As noted in Chapter I, at the beginning of its work, the LRP Committee posed six questions. Now that the Long-Range Plan is completed, how does the committee answer these questions?

1. *In the face of the changing environment within the American Jewish community in general and Conservative Judaism specifically, what is CNS' relationship to the Conservative Movement and the United Synagogue of Conservative Judaism (USCJ)?*

There is little desire -- within the Board of Directors, senior staff, or clergy -- to disassociate from the Conservative Movement. This is reinforced by the congregational survey in which "identity as a Conservative Jew" was the second-highest ranking reason for joining CNS, after "fulfilling my and my family's religious needs," which also speaks to the philosophy of Conservative Judaism. This is not to obscure the organizational problems of the national Conservative Movement, particularly at USCJ, the umbrella organization for Conservative congregations in North America. In its recently-released strategic plan, discussed in detail in Chapter II, USCJ acknowledges its failure to serve its congregational constituents effectively and proposes to improve its programs and services in future. Although a decision to leave the Conservative Movement is not imminent, Recommendation FS-B(5) suggests that CNS continue to monitor its relationship with USCJ and provide proactive grassroots input to the national organization.

2. *What are the values, concerns, needs and priorities of current congregants to which CNS should respond?*

Congregants who are engaged enough to have participated in the LRP's information-gathering efforts find much to like about CNS, including a strong sense of belonging and satisfaction with its clergy, staff and programming. At the same time, these congregants find much room for improvement in several areas, including lack of intimacy, cost/value of membership and concerns about youth education. These insights have influenced the LRP Committee to recommend CNS focus first on meeting the needs of current congregants.

3. *Given current facilities, staffing and financial resources, what is the "capacity" of the congregation, as expressed in membership units? Is this the same as the "optimum" size needed to promote a sense of community, provide services efficiently and achieve financial stability?*

The Board of Directors and senior staff believe that CNS has the capacity to serve up to 1,200 membership units, a 20 percent increase in current size. This is based on the premise that there is both untapped facility and staff capacity to absorb such growth. Under the current membership model, expanding membership would stabilize the congregation's annual operating budget by spreading costs, thereby reducing membership dues for all. At the same time, such growth challenges the congregation to balance the benefits of size and diversity with need to provide intimacy, warmth and personal service to each congregant. In the interim, CNS must seriously consider the long-term viability of the membership model and explore options, having been urged both by USCJ and JFGP to do so in face of changing cultural and demographic trends.

4. *What new tools and technologies can be implemented to improve intra-congregational communication and community-building?*

There is broad agreement that CNS must update all of its information and communication technology. CNS already has: named a standing Technology Committee; recently introduced an interactive element to its website to allow on-line payments, contributions and reservations; and authorized a complete revamping of its website format and content. Additional recommendations related to information technology are contained in Recommendation FS-C.

5. *What are the characteristics and needs of Portland's Jewish community for services that CNS provides? Are the characteristics and needs of future potential members markedly different from those of current congregants. How would this affect the congregation's outreach efforts?*

The results of the community population study released in 2010 by the JFGP suggest there are 47,000 Jews in the Portland metropolitan area, a vast majority of who are unaffiliated with synagogues or other Jewish institutions. The study indicates Portland Jews are like Americans in general, less likely to affiliate with traditional organizations and demanding value and meaningfulness in return for their commitment of time and money. This is the same challenge CNS faces with providing satisfaction to its current congregants. Again, by focusing on being the best organization it can be for its current constituents, CNS will attract others, who are so inclined to take part, from the large pool of potential participants.

6. *What are the congregation's options to accommodate future demand within a range of growth assumptions, e.g., smaller, replacement (stasis) and/or increased membership?*

It has never been the intent of the Board of Directors to allow the congregation to become smaller by choice, so this option was not considered. CNS has maintained its current membership for over 10 years; even a modest improvement in retention would have resulted in growth. The issue is not whether the congregation grows or not but the quality of the programs and services it provides to current and future congregants. By improving the quality, value and efficiency of programs and services, CNS likely will experience natural growth, both by doing a better job of engaging current and attracting new congregants. Then the question becomes: What is the ultimate capacity of CNS staff and facility to serve every congregant well? The Board of Directors and Executive Director believe this is about 1,200 membership units or

the incorporation of a smaller, 200-member congregation with whom to share space and programming.

### **Recommendations**

Recommendations of the LRP Committee for each of the three planning elements are presented below, using the following abbreviations.

**KEY:** P: Primary  
S: Support

ST: Short-term (1-3 Years)  
MT: Mid-Term (4-6 Years)  
LT: Long-Term (7-10 Years)  
OG: On-Going  
\*Underway.

## COMMUNITY-BUILDING (CB) RECOMMENDATIONS

CB RECOMMENDATION	IMPLEMENTING AGENT	TIMING
<b>A. Recognize a shift in demographic and cultural trends by focusing on maximizing congregant satisfaction and sense of value.</b>		
1. *Consider redeployment/reorganization of staff to create a position for a full-time or part-time communications director.	P: Executive Director	ST
2. Adopt new lexicon that refers to <i>congregants</i> rather than <i>members</i> and <i>engagement/connectedness</i> rather than <i>recruitment/retention</i> .	P: Board of Directors Executive Director	ST
3. Rename the Membership Committee as the Congregant Services Committee and the Director of Membership, the Director of Congregant Services.	P: Executive Director S: Director of Congregant Services* Congregant Services Committee*	ST
4. Reinforce the responsibility of the Congregant Services Committee to serve the needs of existing congregants.	P: Board of Directors S: Executive Director	ST
<b>B. Find creative ways to make everyone who enters the synagogue feel welcome.</b>		
1. Expand the Shabbat greeter program to include all religious services, using board members and other volunteers by personally welcoming all worshippers, providing directions to facilities, and introducing newcomers to congregants.	P: Clergy Program Director Ritual Committee Volunteer Coordinator	ST/OG
2. Encourage members of the clergy and lay religious leaders to greet worshippers at the door at the beginning of services and/or stand by an exit as worshippers leave.	P: Clergy Ritual Committee	ST/OG
3. Encourage members of the board to wear name tags to all congregational events.	P: Board of Directors	ST/OG
4. Improve internal way-finding, including better signage and "you-are-here" maps.	P: Facilities Committee S: Board Finance Committee	ST
5. *Consider providing an informal lounge in the library where people can gather for quiet conversation, to read and/or spend time waiting for children.	P: Library Committee S: Program Director Facilities Committee	ST
6. *Explore the expansion of library hours, using volunteers to augment the part-time librarian.	P: Library Committee	ST
7. Upgrade and update library server and software so that congregants have access to the catalog from their homes.	P: Library Committee	ST
<b>C. Serve our congregants where they are spiritually and geographically.</b>		
1. *Encourage clergy, lay religious leaders and congregants to make religious services more meaningful and celebratory.	P: Clergy S: Ritual Committee	OG
2. *Continue to serve the needs of specific constituencies identified by lifestyle, age, household characteristics, needs and preferences with specialized programs and services.	P: Program Director S: Standing Committees	OG
3. Make special effort to reach empty-nesters and older congregants who no longer have children within their homes to draw them to synagogue programs and activities.	P: Program Director S: Standing Committees	OG
4. Improve the internal data base to identify congregants who may be interested in specialized programming.	P: Program Director S: Technology Committee	OG
5. *Encourage clergy and staff to build upon recent successful efforts to identify venues outside the synagogue in which to engage congregants and other participants	P: Program Director Clergy S: Director of Congregant Services Director of Communications	OG
*Recently, the Membership Committee changed its name to CNS Connections – Member Services Committee; the LPR committee continues to urge the use of "congregant" rather than "member" as the former is arguably more welcoming and inclusive.		

CB RECOMMENDATION	IMPLEMENTING AGENT	TIMING
<b>D. Enhance volunteer opportunities within the synagogue and community at large.</b>		
1. Encourage broad participation by all segments of the CNS congregation in implementing this Long-Range Plan.	P: Board of Directors Executive Director	OG
2. Assign a staff member with responsibility for coordinating volunteer recruitment including: a. Creating a data base of potential congregant volunteers based on interests, skills and availability. b. Working with committee chairs to identify and reach out to congregants with appropriate interests and skills. c. Developing a list of one-time-only and on-going volunteering opportunities and undertaking personal outreach to match congregants with these opportunities. d. Developing on-going program to train, mentor, support and honor volunteers for their service.	P: Executive Director Program Director S: Board of Directors	ST/OG
<b>E. Explore the feasibility of expanding Shabbat morning services and Shabbat-appropriate activities, in what is known as the <i>synaplex</i> model.</b>		
1. Consider trial period once a month for six months and evaluate prospects for continuing.	P: Clergy Executive Director Director of Congregant Learning Program Director S: Ritual Committee Youth Education Committee	ST-MT
2. Consult with clergy about activities in addition to religious services are appropriate in the synagogue for congregants who want alternative activities.		
3. Coordinate with staff to work out logistics of joint Kiddush when the <i>synaplex</i> coincides with a Bar or Bat Mitzvah-related Kiddush lunch.		

## JEWISH EDUCATION (JE) RECOMMENDATIONS

JE RECOMMENDATION	IMPLEMENTING AGENT	TIMING
<b>A. Improve youth education curriculum to inspire students and their parents to invest in Jewish education. (*A revamping of the entire youth education program is underway.)</b>		
1. Establish clear paths for children’s education programs including offering flexibility options for families.	P: Director of Congregant Learning	ST
2. For pre-school children (0-5 years) a. Move toward longer day option for Foundation School to make it a viable option for working parents. b. Look at opportunities for pre-schoolers to participate in Hebrew immersion programs c. Increase integration of Foundation School families and programs with other education and Shabbat/holiday programming,	P: Foundation School Director Director of Congregant Learning Clergy	ST
3. For grade- and middle-school students through B’nai Mitzvah (6-13 years) a. Review and re-work curricula on grade-by-grade basis to make it more interesting and relevant to children. b. Create parent and student ambassadors program: identify problems or concerns of families, greet new families, and be resources for parents and children within class. c. Integrate students in religious school with rest of congregation, (e.g., more active part in main services). d. Establish a review committee for the B’nai Mitzvah process; revise communications/expectations. f. Consider transforming Sunday program to a Shabbat and Shabbat retreat program. g. Develop informal educational activities through school and youth movement to provide more meaningful opportunities to be involved in Jewish life at CNS and in the community. h. Foster relationships with families whose children attend PJA to integrate these students into CNS youth activities.	P: Director of Congregant Learning Youth Director Clergy S: Youth Education Committee Youth Activities Committee	ST/OG
4. For post-B’nai Mitzvah students (14 – 18 years) a. Review and re-work curricula on grade-by-grade basis to make it more interesting and relevant to middle and high school students. b. Add more attractive, inviting opportunities for post B’nai-Mitzvahs to read Torah or lead services. c. Promote opportunities that strengthen participation of CNS youth in Jewish summer camps and Israel trips. Create a fund to make it possible for each CNS child to participate. d. Encourage opportunities for Jewish teen socialization. e. Develop teen mentor training program to assist in formal and informal education programs. f. Consider opportunities for parents of teens to learn or socialize on Wednesday nights during High School time.	P: Director of Congregant Learning Youth Director Clergy S: Youth Education Committee Youth Activities Committee	ST/OG

JE RECOMMENDATION	IMPLEMENTING AGENT	TIMING
<b>B. Ensure student and parent satisfaction with youth education by improving communication and providing more opportunities to express concerns and participate in decision-making.</b>		
1. *Create and distribute an accurate and complete calendar at the beginning of every year, including both CNS and relevant community-wide events.	P: Director of Congregant Learning Youth Director S: Clergy	ST
2. Provide clear, positive, inclusive, and accurate communication through emails and website.	P: Director of Congregant Learning Youth Director	ST
3. *Create opportunities for parents and students to participate in decision-making that affects education programs, curricula and activities.	P: Director of Congregant Learning Youth Education Committee	ST
4. Implement annual satisfaction surveys to students and parents to assess program effectiveness.	P: Director of Congregant Learning	ST
5. Consider web-based options for make-up of classes (i.e. audio or video options).	P: Director of Congregant Learning	ST-MT
<b>C. Enhance adult education program.</b>		
1. *Provide periodic opportunities for adults to learn to read and speak Hebrew and participate in religious services.	P: Clergy Director of Congregant Learning S: Adult Education Committee	OG
2. *Continue to monitor and evaluate adult education offerings.		
3. Encourage CNS congregants to participate in the two-year Florence Melton Adult Mini-School program.		
4. Encourage use of the Feldstein Library by congregants to enhance /supplement the adult education experience.	P: Clergy Director of Congregant Learning Librarian	OG
5. Work with librarian to ensure that collection has appropriate/ current materials to support adult education curriculum.		
<b>D. Seek opportunities for children and adults to participate in activities with other Jewish community organizations.</b>		
1. *Actively seek out collaborative relationships with other Jewish education providers within Portland.	P: Director of Congregant Learning Youth Director S: Adult Education Committee Youth Education Committee	OG
2. Update website to create clear and inviting information about all education offerings at CNS (See FS-C below).	P: Director of Congregant Learning Youth Director S: Adult Education Committee Youth Education Committee	ST
3. Coordinate CNS website and calendar with other community calendars and websites (See FS-C below)	P: Director of Congregant Learning Youth Director S: Adult Education Committee Youth Education Committee	ST-MT
4. Explore expansion of CNS adult education offerings in conjunction with other Jewish community resources.	P: Director of Congregant Learning Adult Education Committee Clergy	ST-MT
5. Consider developing Center for Hebrew Immersion to coordinate all such lifelong opportunities at CNS.	P; Director of Congregant Learning Youth/Adult Education Comm. e Clergy	ST-MT
6. Consider participation in a community-wide Hebrew High program.	P: Director of Congregant Learning	ST-MT

## FINANCIAL STABILITY (FS) RECOMMENDATIONS

FS RECOMMENDATION	IMPLEMENTING AGENT	TIMING
<b>A. Establish broad-based congregational task force to study recommendation in the USCJ strategic plan that congregations move from the traditional <i>membership model</i> to one of <i>participation/engagement</i>. The task force would report its findings/recommendations to CNS Board of Directors in 12-18 months, on these tasks</b>		
1. Explore cultural, programmatic, operational and financial consequences of a shift that at least reduces reliance on membership dues to funding annual operations.	S: Task Force  P: Board of Directors Development Director Board Finance Committee Executive Director Dir. Finance/Operations Dir. of Congregant Serv.	ST
2. Identify the optimum relationship between program/service delivery and financing to be achieved by the end of the 10-year planning period and develop a phased implementation plan.		ST
3. Evaluate role of philanthropy while maintaining "membership", so dues continue to support programs in short- to mid-term. Adopt following objectives: a. Support trend of increasing philanthropy over time. b. Replace annual campaign in 5-10 years. c. Identify and recruit enhanced donors within the congregation.		ST
4. Investigate how community members identify with congregations, including investigation of membership model, "fee for service" and/or expansion of philanthropy. Consider approach in concert with other synagogues.		ST
5. Explore participation in innovative community financing concepts now under consideration by JFGP, e.g., potential Jewish Community Annual Membership Card and/or Jewish Birthright Card.		ST
6. Develop implementation strategy to achieve Task Force recommendations over the 10-year term of this Long-Range Plan.		ST-LT
<b>B. While the task force is deliberating on potential changes to the traditional membership model, continue to operate in the current model.</b>		
1. * Retain current congregant base.	P: Congregant Services Comm. Dir. of Congregant Services	ST-MT
2.. Gradually increase congregants by 125 households over 10 years as increasing congregants decreases the financial stress on individual congregants. This includes: Year 1 (5); Year 2 (10); Year 3 (15); Year 4 (20), Years 5-7 (25).	P: Congregant Services Comm. Dir. of Congregant Services S: Staff Board of Directors Clergy	ST-LT
3. Develop formal campaign to attract new congregants. A formal strategy should be developed to include marketing, promotions and advertising, in combination with efforts in CB and JE elements. Consider establishing a standing Marketing Committee.	P: Congregant Services Comm. Dir. of Congregant Services S: Board of Directors Executive Director	ST-MT
4. Evaluate possibility of comprehensive dues structures for families with children to consolidate "membership" and school fees in a single category.	P: Congregant Services Comm. Dir. of Congregant Services Director of Finance/Operations S: Director of Congregant Learning	ST-MT
5. *Continue to monitor relationship with USCJ and provide pro-active bottom-up input for USCJ decision-making.	P: Board of Directors Executive Director	OG

FS RECOMMENDATION	IMPLEMENTING AGENT	TIMING
<p>6. *Increase Foundation School enrollment to capacity to maximize use of facility:</p> <p>a. Set reasonable goals based on assumptions about increased congregants and/or expanding hours of operation to accommodate working parents.</p> <p>b. Evaluate tuition structure for congregants and non-congregants.</p>	<p>P: Youth Education Committee Dir. of Congregant Learning</p> <p>S: Executive Director Board of Directors</p>	<p>ST</p>
<p><b>C. Make the adoption of cutting-edge information technology a high priority to improve communications with congregants and improve staff efficiency.</b></p>		
<p>1. Fund IT management as a permanent line item in the annual operating budget.</p>	<p>P: Board of Directors</p> <p>S: Executive Director Dir. of Finance/Operations</p>	<p>ST</p>
<p>2. *Re-energize/re-focus the Technology Committee:</p> <p>a. Evaluate software and website needs and create plan to develop, implement and evaluate to update accordingly.</p> <p>b. Develop plan to update/replace hardware as needed, i.e. replace computers every three years.</p> <p>c. Include library computer and software needs in a. and b. above.</p> <p>d. Consider applying for a grant to USCJ and/or other foundations to analyze IT deficit and possibly provide one-time only funding for upgrades and/or use USCJ's technical consulting services.</p> <p>d. Use as models other Conservative congregations considered to have state-of-the art websites/information systems.</p> <p>e. Develop process for communicating with those who do not wish to or are not able to use electronic communications.</p>		
<p>3. Fund a half-time technology staff position, if financially feasible, or fund an on-call information technology consultant as needed. Consider sharing with another Jewish organization.</p>	<p>P: Board Finance Committee</p> <p>S: Director of Finance/Operations</p>	<p>ST-MT</p>
<p>4. Coordinate efforts with Community-Building and Jewish Education</p>	<p>P: Technology Committee</p>	<p>OG</p>
<p><b>D. Undertake an organizational audit and redeploy staff for maximum efficiency/capacity to meet future needs.</b></p>		
<p>1. Evaluate current professional staff structure to ensure it is efficiently deployed and serving CNS congregant needs. Retain outside consultant if required.</p>	<p>P: Executive Director</p>	<p>ST</p>
<p>2. Hire full- or part-time fundraising/development professional to maximize revenue potential from exploring grants and expanded endowment, capital campaign and other fund raising events. This position should be separated from the Director of Congregant Services role.</p>	<p>P: Executive Director</p> <p>S: Board of Directors</p>	<p>ST</p>
<p><b>E. Explore external partnerships and relationships to defray costs of operations and enhance revenues.</b></p>		
<p>1. * Research potential partnerships with smaller congregations, in addition to/in lieu of increasing membership base. Pursue grant opportunities to further such relationships.</p>	<p>P: Executive Director</p> <p>S: Various committees Clergy</p>	<p>ST OG .</p>
<p>2. *Aggressively pursue rental opportunities for space at CNS.</p>	<p>P: Executive Director</p>	<p>ST - OG</p>
<p>3. *Upgrade main kitchen and upstairs auxiliary kitchen as needed to enhance CNS events and facilitate facility rentals by outside users.</p>	<p>P: Facilities Committee</p> <p>S: Finance Committee Executive Director</p>	<p>ST-MT</p>
<p>4. Engage outside CNS community to increase revenue, i.e., concerts, lectures, off-site retreats.</p>	<p>P: Executive/Program Director Various Committees Clergy</p>	<p>ST-OG</p>

FS RECOMMENDATION	IMPLEMENTING AGENT	TIMING
<b>F. * Retire outstanding debt from 2008 CNS capital campaign and increase endowment to broaden CNS' funding base.</b>		
1. Raise the remaining \$1.6 million (net of current pledges) plus carrying cost to retire the capital debt, with firm commitments in three years and collections within six years.	P: Development Director S: Executive Director Board of Directors	ST-MT
2. Evaluate debt payment options to determine most cost effective way to retire the debt, such as by means of non-earmarked endowment gifts.	P: Development Director S: Executive Director	ST
3. Create the framework to raise 4-5 times the annual operating budget for endowment within 10 years (re-start Shalom Society). a. Identify CNS members to solicit for purpose of retiring campaign debt and raising endowment gifts. b. Develop strategy for goal, timing and staffing. c. Explore assistance from Oregon Jewish Community Foundation.	P: Development Director Shalom Society Committee S: Executive Director Board of Directors	ST-LT

**APPENDIX A**  
**LONG-RANGE PLANNING COMMITTEE MEMBERSHIP**

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**Members:**

Beverly Bookin, Co-Chair  
Arnold Cogan, Co-Chair  
Glen Coblens, Steering Committee  
Liza Milliner, Steering Committee  
Chantal Rosenthal, Steering Committee  
Mel Berwin  
Jenn Director-Knudsen  
Deborah Freedberg  
Susan Greenberg  
Zachary Horowitz  
Loren Koplan  
Josh Mitnick  
Sally Segal  
Mark Sherman  
Mark Zeitzer  
Rich Zwetchenbaum

**Ex Officio:**

Cantor Deborah Bletstein  
Rabbi Brad Greenstein  
Rabbi Dan Isaak  
Steven Kahn, Vice President/Board of Directors  
Doug Lenhoff, President/Board of Directors  
Fred Rothsetin, Executive Director  
Dana Sacks, Secretary/Board of Directors

## *APPENDIX B*

### *PROPOSED WORK PROGRAM FOR CNS LONG-RANGE PLAN*

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**Statement of Problem.** Continuing a nearly 140-year tradition of Conservative Judaism in Portland, Congregation Neveh Shalom (CNS) was established in 1961 through the merger of two congregations, Ahavai Shalom and Neveh Zedek. In 1964, the congregation moved into its current facility at 2900 SW Peaceful Lane in southwest Portland. Now nearly 50 years old, the congregation's membership has stabilized at about 1,000 membership units comprised of approximately 2,500 individuals. In the past 10 years, there has been a 40% turnover in membership units, reflecting the replacement of aging households with younger families, a part of the natural evolution of any healthy institution. Currently, CNS has an annual budget of nearly \$2.5 million and a full-time staff of 18. That CNS has been able to "hold its own" in the past decade is noteworthy as the Conservative movement itself has experienced a significant loss of membership, reflected in the declining membership of its affiliated congregations across the country.

Following the implementation of the 10-year Long-Range Plan adopted by the CNS Board of Directors in 1998 described below, CNS has increased its institutional capacity by expanding its staffing and programming and undertaking a major renovation/expansion of its facilities. This raises the question of what is the optimum size of the congregation to best utilize this capacity and provide financial support, as membership dues constitute about 45% of the operating budget. Moreover, a soon-to-be-released demographic study of the Portland metropolitan area commissioned by the Jewish Federation of Portland suggests that the Jewish population in the region is significantly greater, about 45,000 people, than previously thought, suggesting that there may significant untapped demand for synagogue affiliation. On the other hand, an increase in the size of the membership could result in a loss of intimacy and sense of community that is greatly valued by many congregants. Therefore, it is imperative that the congregation re-think its future in a deliberate and proactive manner.

**Planning Efforts to Date.** In 1996, the CNS Board of Directors established a Long-Range Planning (LRP) Committee under the co-chairmanship of Arnold Cogan and Beverly Bookin, two long-time members with backgrounds in planning. The resulting 10-year long-range plan was adopted by the Board in 1998. The plan had two major recommendations:

- Expand the congregation's institutional capacity by hiring a full-time executive director, assistant rabbi and part- or full-time development director. Subsequently, the congregation hired the executive director, Fred Rothstein, who has been in his position now for nearly nine years. Now in his fourth year of service, Rabbi Bradley Greenstein is the second assistant rabbi hired by the congregation. The congregation did not hire a development director but has used member volunteers to fill this role.
- Undertake a significant renovation of the congregational campus to update existing facilities such as the main sanctuary, social hall and kitchen; address serious deferred maintenance problems; and provide additional facilities to accommodate existing and future needs including construction of a mid-sized chapel/performance space,

expanded library, additional classrooms and offices, and outdoor plaza/meeting place. The \$9.5 million renovated facility opened just prior to Rosh Hashanah, 2008. To date, the congregation has raised \$8.1 million dollars in its capital campaign.

With full implementation of the 1998 plan, the congregation's Board of Directors and senior management have decided that it is necessary to update the plan with a 5-10 - year planning horizon to provide guidance on several key issues: 1) nature and extent of future growth; 2) range of programs and services to meet the needs of current and future congregants; 3) long-term financial stability; and 4) position within the greater Portland community.

### **Planning Questions**

1. In the face of the changing environment within the American Jewish community in general and Conservative Judaism specifically, what is CNS' mission in the coming decade? What should be the congregation's relationship to the United Synagogue of Conservative Judaism (USCJ)?
2. What are the values, concerns needs and priorities of current congregants to which CNS should respond?
3. Given current facilities, staffing and financial resources, what is the "capacity" of the congregation, as expressed in membership units? Is this the same as "optimum" size needed to promote a sense of community, provide services efficiently and sustain financial stability?
4. What new tools and technologies can be implemented to improve intra-congregational communication and community-building?
5. What are the characteristics and need of Portland's Jewish community for the services that CNS provides? Are the characteristics and needs of future potential members markedly different from those of current congregants? How would this affect the congregation's outreach efforts?
6. What are the congregation's options to accommodate future demand within a range of growth assumptions, e.g., smaller, replacement (stasis) and/or increased membership?

### **Proposed Work Program**

#### Organize LRP Committee (October - December 2009)

- 1.0 **Establish Ad Hoc Long-Range Planning (LRP) Committee.** Authorize the establishment of an ad hoc Long-Range Planning (LRP) Committee of up to 20 members selected from the congregational membership to serve in the planning process for an estimated 15-month period until 12/10. The committee of the whole will meet monthly. The President and Vice President/Board Liaison of the Board of Directors, Executive Director and Rabbis will serve as non-voting ex officio members. In addition to meetings of the committee-of-the-whole, committee

members will form subcommittees and/or take on individual assignments as necessary throughout the process, augmented by information provided by CNS staff, Board of Directors and standing committees. **Products:** Organizational chart, roster of members and meeting schedule.

- 2.0 **Initiate planning process.** Hold initial meetings to orient members, review and approve the proposed work program and schedule, establish committee's organization. **Product:** Revised work plan.
- 3.0 **Hold initial strategic workshop.** Devote the 12/2/09 committee meeting to adopt a committee mission statement, undertake a 20-year visioning exercise, set the term of the long-ranging planning period, and revise planning questions. **Products:** Workshop summary and revised planning questions.
- 4.0 **Hold an internal committee "focus group".** At the 1/6/10 committee meeting, conduct an internal focus group of the committee to test its temperature, share experiences, and provide preview of proposed efforts to survey the congregation, and revise planning questions. **Products:** Summary of focus group.

Undertake Extended Research of Internal/External Conditions (January – May 2010)

- 5.0 **Develop list of existing and potential programs and services.** With the assistance of the Executive Director, meet with committee of standing committee chairman to request that each committee provide a list of current programs and services that it oversees and develop a prioritized "wish list" of up to five program and/or activities that its members would like to be initiated in the next 5-10 years. Ask the Executive Director and Rabbis to develop a similar list of existing and future programs and services. **Product:** Compendium of existing and potential future programs/services.
- 6.0 **Conduct surveys of existing congregants** to identify values, concerns, level of satisfaction, desire for new programs and services, and other information that can be used to guide the LRP Committee in its recommendations regarding the congregation's future direction. This could include some or all of the following:
  - 6.1 Conduct 6-8 interviews with key internal "opinion leaders" such as the clergy, Executive Director, Outreach and Engagement Director, Education Director, Board President, and Chair of the Past Presidents Council. **Products:** Interview questionnaire; summary of interviews.
  - 6.2 Use a revised version of the questionnaire developed in the 1998 planning process to undertake either a randomized or "universal" survey of the congregation. Name a subcommittee of the LRP Committee to supervise the revision of the questionnaire instrument, design survey, determine distribution (e.g., by mail, electronically), and analyze results. **Products:** Survey questionnaire; summary of findings.
  - 6.3 Consider holding up to five focus groups of members with shared characteristics and interests, e.g., young families, empty-nesters, more

observant, seniors, clergy/staff. **Products:** Focus group guide; summary of findings of focus groups.

6.4 Augment with survey work in Tasks 6.1 – 6.3 with review of exit interviews of past members who have left due to dissatisfaction; existing members who are inactive, and/or prospective members identified by the Director of Outreach and Engagement and Membership Committee. **Products:** Interview questionnaire; summary of interviews.

7.0 **Assess current internal conditions** including but not limited to:

7.1 Prepare a summary of the synagogue organization structure, services/programs, paid and volunteer staffing, budget and other pertinent characteristics. **Product:** Summary of congregational institutional arrangements.

7.2 Develop a congregational demographic profile using existing computer software to track members by sex, age group, zip code, average family size, and synagogue activities, e.g., Foundation and religious school participation, havurot. Compare profile of congregation as a whole to the demographic characteristics of those responding to the congregational survey. Another option is to develop a profile of the last 100 members and compare to the congregation as a whole. **Product:** Congregation membership profile.

7.3 Evaluate capacity of existing synagogue and cemetery facilities to accommodate peak demand (e.g., religious school, B'nai Mitzvah, High Holy Day services), updating facility analysis with the completion of the renovation. **Product:** Facility capacity analysis.

7.4 Working with the Executive Director and Rabbis, determine the “optimum” number of membership units that can be served within the existing institutional capacity including paid staff, facilities and financial resources. **Product:** Membership capacity analysis.

7.5 Working with the Executive Director and Board Executive Committee, identify opportunities for expanded volunteer participation, including the fostering of leadership skills. **Product:** Description/estimate of volunteer capacity.

7.6 Work with the Finance Committee to assess the existing/future financial capacity, including current operations and capital budgets, building fund, investments and endowment income, and fund-raising. **Product:** Financial capacity analysis.

7.7 Work with Executive Director and office to evaluate existing technology/computer capacity and identify needed upgrades. **Product:** Evaluation of existing technological capacity.

- 8.0 **Assess current external conditions** including but not limited to:
- 8.1 Using Jewish Federation of Portland (JFP) and other local resources, develop a list of other synagogues and religious fellowships and develop profile of each including contact, location, size, affiliation and related information. **Product:** List/description of other Portland synagogues/religious fellowships.
  - 8.2 Review and analyze the findings of the soon-to-be-released Portland Jewish population study funded by JFP to analyze the potential demand for CNS membership. **Products:** Summary of Portland Jewish population study and analysis; implications for future CNS membership.
  - 8.3 Do research on issues and challenges facing the Conservative movement nationally and assess if and how these affect CNS as an affiliated synagogue. **Product:** Summary and analysis of issues/challenges facing the nation Conservative movement,
- 9.0 **Survey up to four other Conservative synagogues of similar size** in other cities to identify ways in which they have coped with congregational service provision and growth pressures. Work with Executive Director to identify list of congregations to be used. **Products:** Interview questionnaire; summary of findings.
- 10.0 **Prepare summary report** presenting findings from Tasks 5.0 - 9.0. **Product:** Summary report summarizing internal and external current conditions.

#### **Test and Refine Work (May - October 2010)**

- 11.0 **Hold half-day planning retreat** in late 9/10 following the High Holy Days to include LRP Committee and other participants such as the Executive Director, Rabbis and selected members of the professional staff, Board of Directors, Past Presidents' Council and standing committee chairmen. Activities will include:
- 11.1 Adopt a congregational mission statement.
  - 11.2 Undertake a SWOT (strengths/weaknesses/opportunities/threats) analysis.
  - 11.3 Review findings of summary report prepared in Task 10.0.
  - 11.4 Develop up to three scenarios for future growth including but not limited to moratorium on growth, moderate growth and aggressive growth. Scenarios can include options to assist formation of new Conservative congregations, continued expansion at the Peaceful Lane site or development of satellite facilities.
  - 11.5 Evaluate the benefits/disadvantages of no-growth versus growth scenarios from the religious, cultural, financial, social and institutional capacity perspectives.

11.6 Develop criteria for evaluating scenarios.

**Products:** Summary of all-day retreat discussion; findings and recommendations; 2-3 scenarios for CNS' future; criteria for evaluating scenarios.

12.0 **Further refine selected scenarios** including determination of ultimate number of membership units accommodated; new program and services to consider; additional updating of facilities and additional staff required; and financial issues including capital campaign retirement and endowment growth, and related issues. Prepare summary of selected scenarios for inclusion in The Chronicle or as a separate mailing to all congregants. **Product:** Refined alternative future scenarios.

13.0 **Hold congregational meeting** to review findings of summary report (Task 10.0) and present 2-3 refined scenarios developed in the all-day retreat (Task 11.0). Modify scenarios as necessary to reflect congregants' comments and concerns. **Product:** Final alternative future scenarios; summary document for distribution to the congregation via mail/e-mail and/or The Chronicle.

**Finalize Recommendations and Prepare Final Report (November 2010 - March 2011)**

14.0 **Hold half-day planning retreat** with the LRP Committee and others as appropriate to review the scenarios developed in Tasks 11.0 and 12.0, as modified by the input from the congregational meeting (Task 13.0), and select scenario that best fits needs of congregation. **Product:** Selected future scenario.

15.0 **Prepare report summarizing recommended scenario**

15.1 Develop recommendations for selected scenario with array of planning elements and recommended implementation. **Product:** LRP action plan components

15.2 Prepare final report for presentation to the Executive Committee of the Board of Directors, Executive Director and Rabbis. The Executive Committee will then decide how best to act upon these recommendations. Submit archives of LRP committee work to Executive Director for future reference. **Product:** Long-Range Plan

**Preliminary Schedule.** From 10/09 to 6/11 with break in summer of 2010.

**Budget.** To be determined but minimal primarily for printing and postage, and reliance upon volunteer help and staff assistance.

*APPENDIX C*  
*CNS PROGRAM AND SERVICES (2010 – 2011)*

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Adult Education Classes, Events & Programs  
Auction / Fundraising  
B'nai Mitzvah  
Cemeteries  
Chavurot  
Chessed (Caring – Congregant Assistance)  
Chevra Kavod HaMet  
Chik Chok Service  
Choir  
CNS Babies  
College Outreach  
Cultural Arts Events  
Daily Minyan  
Downstairs Minyan  
Foundation School  
Hebrew & Religious Schools  
Hinenu (Young Adults)  
Holiday Programs (Sukkot, Chanukah, Purim, Pesach, Shavuot, etc.)  
Israel Affairs  
Jewish Film Group  
Keva Service  
Kochavim / Notz'tzim (Hebrew Immersion)  
Library  
Men's Club  
Mother's Circle  
Orchestra  
Senior Adult Programs  
Shabbat / Holiday Dinners  
Shoreshim / Tot Shabbat (Young Families)  
Sisterhood / Women's League  
Taste & Travel Evenings  
Thirteen Mitzvot  
Tikkun Olam / Social Action (Many projects)  
Torah Readers / Gabbai'im  
Youth Activities (Jr. Kadima, Kadima, USY)

## **APPENDIX D**

### **RECOMMENDATIONS OF THE TECHNOLOGY SUBCOMMITTEE**

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**Task:** Evaluate existing technology/computer capacity and identify needed upgrades

**Background:**

- One time grant for current computers, which have not been upgraded/replaced since
- Currently 24 computers at the synagogue
- Website and computers are maintained on a volunteer basis
- Website and e-mail are maintained at a very minimum cost
  - Website: ~\$10/yr
  - E-mail: Constant contact: \$10/month
- Lack capacity for tracking program/event participation and response
- Lack of data backup and disaster recovery plan
- Currently in the evaluation stage of membership databases

**Issues:**

- Currently no budget for computers and technology ie: hardware or support.
- The synagogues' use of information technology is evolving but inadequate at this time.
- School would like more consistent WiFi throughout campus and increased website capability.
- Management reports/reporting/decision support systems currently using Crystal Reports but needs more support/training.
- Currently receiving multiple and repetitive e-mail from multiple sources ie: Facebook, Pingg, e-mail blast causing e-mail fatigue, members ignoring and deleting e-mails and spam.
- No congregational internet privacy policy

**Recommendations:**

- Opt out e-mail communication (with special consideration to specific populations) to increase efficiency save money and paper.
- Computers should be replaced on a rotating 4 year basis at about \$800.
- \$1000/computer without monitor.
- Website needs:
  - Online payment/donations
  - Online reservations
  - Online password-protected secure membership directory
  - Updated, accurate, online, central calendar 6 months out
  - Capacity for tracking program/event participation and response

- Religious and Foundation School needs:
  - Post Lesson Plans/Links/Forms i.e., field trip permission slips
  - Online registration
  - Consistent WiFi throughout campus
  
- Need a unifying e-mail policy to reduce e-mail fatigue/spam (ie multiple e-mails from multiple sources - -Pingg, Facebook, Weekly e-mail blasts).
  
- Need a congregational internet privacy policy.
  
- Need more support/training for Crystal Reports for management reports/reporting/decision Support Systems.
  
- Need ability to track program/event participation and response.
  
- Need online data backup.
  
- Need a written plan for disaster recovery.
  
- Need a membership database that better suits congregational needs.

**Summary.** Congregation Neveh Shalom currently depends on a volunteer group for our information technology needs. The congregation wants and needs more information technology utilization in many forms and settings. By employing the above recommendations this goal can be reach and the needs of our congregation satisfied. To do this, professional resources will need to be used. Capital for these resources will need to be raised using the money saved employing the use of information technology. The congregation will also need to prioritize these issues for future growth and allocating appropriate funding so such projects can augment and expand the congregational experience. Paper and Postage budget vs. costs

Postage		2009-10 Paper Costs:		
Spent 2009-10	\$17,915		Paper	\$4,194
Budget 2010-2011	\$16,570		Envelopes	\$3,190
			Letterhead	\$1,489
			Labels	\$613
			Totals:	\$9,486
2009-10 PAPER AND POSTAGE COSTS:			\$27,401	

**APPENDIX E**  
**JFGP'S COMMUNITY POPULATION STUDY:**  
**SUMMARY OF KEY FINDINGS**

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In April 2011, JFGP released the findings of its Portland Jewish Demographic and Opportunity Study, which had been a goal of the agency to undertake for nearly 20 years. The study was undertaken by a demographer who had conducted similar studies in many American cities. The full Demographic and Opportunity Report (4/11) is at the JFGP's website, [www.jewishportland.org](http://www.jewishportland.org). Key findings include:

- The known community, e.g., identified as members of a synagogue or other Jewish organization, is roughly 11,000 households (40 percent), while the projected number of Jewish households is 27,700.
- The survey divides respondents into three segments: High-, Moderate- and Low-Involvement, with the latter meaning no affiliation with a synagogue or other Jewish organization. Ninety-six percent of highly-involved respondents are members of a congregation, whereas only two-thirds of moderately-involved respondents are affiliated.
- Not surprisingly, the vast majority of those who identify as highly-involved indicate that it's very important to be involved in the Jewish community, while 40 percent of those with low levels of involvement state that it is not important.
- Jews with lower levels of involvement differ dramatically from those with higher levels of involvement demographically, attitudinally and behaviorally, which demonstrate the need for new approaches for reaching and engaging this audience.
  - They are more likely to be unmarried, living in households with non-Jews, newer to the Portland area and reside in areas not in close proximity to Portland Jewish organizations. They also are far less likely to have children than those Jews with higher levels of involvement.
  - As a group, they do not place a great deal of importance on being involved in the Jewish community, most of their friends are not Jewish and they rarely, if ever, attend services or other community events.
  - They are far more likely to identify as cultural or non-practicing Jews and more consider themselves Reform than other denominations of Judaism.
- According to the study, to engage Jews with lower levels of involvement, consider the following recommendations for attracting this audience:
  - As a majority of Jews with low levels of involvement have mostly non-Jewish friends, programming must offer more than just an opportunity to socialize with friends.

- Given the fact that this audience is most likely to be living with non-Jews, consider development of more secular events or programs that are very welcoming and accepting of non-Jews.
- As the majority of Jews with low levels of involvement live outside the immediate area where Jewish services are located, develop more community-based events/programs especially on the East side.
- Consider adding new programming for singles, provide programming with little or no cost, as cost is often considered a barrier to participation; and explore ways to enhance outreach to new arrivals.

**APPENDIX F**  
**QUESTIONNAIRE FOR CNS CONGREGATIONAL SURVEY (SPRING 2010)**

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**The survey is anonymous and responses will only be represented in the aggregate.**

1. Why did you/your family join Congregation Neveh Shalom (CNS)? Check as many as are applicable.

- |  |   |
|--|---|
| <input type="checkbox"/> Family  | <input type="checkbox"/> To meet social needs                 |
| <input type="checkbox"/> Friends   | <input type="checkbox"/> To meet adult educational needs      |
| <input type="checkbox"/> Identification as Conservative Jew                          | <input type="checkbox"/> To meet children's educational needs |
| <input type="checkbox"/> Location  | <input type="checkbox"/> To meet community action needs       |
| <input type="checkbox"/> Cemetery privileges   | <input type="checkbox"/> Value for the money                  |
| <input type="checkbox"/> Reputation of rabbi(s) and/or cantor at the time you joined | <input type="checkbox"/> Other (please specify) _____         |
| <input type="checkbox"/> To meet religious needs                                     | _____   |
| <input type="checkbox"/> To meet cultural needs                                      | <input type="checkbox"/> I am not a member                    |

2. Which of the following at Neveh Shalom enriches you/your family's life? Check as many as are applicable.

- |   |   |
|---|---|
| <input type="checkbox"/> Foundation School                      | <input type="checkbox"/> Cultural programs                    |
| <input type="checkbox"/> Bar/Bat mitzvah training               | <input type="checkbox"/> Kochavim / Notz'tzim                 |
| <input type="checkbox"/> Adult education programs               | <input type="checkbox"/> Social programs/activities           |
| <input type="checkbox"/> Library                                | <input type="checkbox"/> Community action programs/activities |
| <input type="checkbox"/> Interaction with clergy                | <input type="checkbox"/> Youth groups                         |
| <input type="checkbox"/> Religious services/programs            | <input type="checkbox"/> Senior groups                        |
| <input type="checkbox"/> Religious school/religious high school | <input type="checkbox"/> Sisterhood/Women's League            |
| <input type="checkbox"/> Culture of Conservative Judaism        | <input type="checkbox"/> Men's Club                           |
| <input type="checkbox"/> Volunteer opportunities                | <input type="checkbox"/> Other (please specify)               |
| <input type="checkbox"/> Leadership opportunities               | _____   |

3. Please indicate your level of agreement with the following statements by circling the appropriate response using the scale provided below. If a specific response does not apply or you have no opinion, leave blank.

Strongly Agree – 4      Agree – 3      Disagree – 2      Strongly Disagree - 1

- |         |   |
|---------|---|
| 1 2 3 4 | CNS is a meaningful part of my/my family's life   |
| 1 2 3 4 | CNS helps me/my family to feel connected to Judaism   |
| 1 2 3 4 | CNS helps me/my family to feel connected to the Portland Jewish community   |
| 1 2 3 4 | CNS helps me/my family feel connected to the Conservative Movement  |
| 1 2 3 4 | I feel welcome at CNS   |
| 1 2 3 4 | CNS meets my/my family's religious needs  |
| 1 2 3 4 | The rabbis are accessible and responsive to my needs and concerns   |
| 1 2 3 4 | The professional staff (e.g. executive director, school director) is accessible and responsive to my needs and concerns |
| 1 2 3 4 | The office staff is courteous and responsive to my needs and concerns   |
| 1 2 3 4 | CNS provides/has provided an adequate Jewish education for my children  |
| 1 2 3 4 | CNS provides an important source of social interaction & friendships for me/my family                                   |
| 1 2 3 4 | There are adequate opportunities for me/my family to participate in synagogue life                                      |

4. Regarding your religious/observance practices, please check as many as are applicable.

- I/my immediate family regularly light(s) candles on Friday night
- I/my family is Shomer Shabbat
- I/my family regularly attend daily(s) services
- I/my family regularly attend weekly(s) services
- I/my family keep(s) kosher
- I/my family hold(s) or attend(s) a Seder every year
- I had a Bat or Bar mitzvah
- I converted to Judaism
- My family has a member who has converted to Judaism
- I can speak:
  - Hebrew
  - Yiddish
  - Ladino
  - Russian
- I/my family have (has) been to Israel
- I/my family have (has) lived in Israel

5. I/My family consider myself/ourselves:

- Reform
- Conservative
- Orthodox
- Reconstructionist
- Other (please specify) \_\_\_\_\_

6. In a typical month (excluding summer months), about how many times do you and members of your family come to the synagogue for all purposes?

- Never
- 1 - 2 times
- 3 - 4 times
- 5 - 8 times
- 9 - 12 times
- 13+ times
- I/we just joined the synagogue; my/our pattern of synagogue usage is not yet established

7. In the past three months, which of the following religious services have you or a member of your family attended? Check as many as are appropriate.

- Friday evening service
- First Friday service
- Chik-Chok
- Saturday morning service: Sanctuary
- Saturday morning downstairs minyan: Zidell Chapel
- Saturday morning Keva
- Kehillat Noar
- Weekend morning minyan
- Tot Shabbat
- Weekday morning minyan
- Weekday evening minyan
- Monthly healing service
- Other (please specify) \_\_\_\_\_

8. If you have children 18 years and younger living at home, please identify the Jewish educational and youth activities in which any of your children currently participate. Check as many as are applicable.

- |   |   |
|---|---|
| <input type="checkbox"/> CNS Foundation School                            | <input type="checkbox"/> Neveh Shalom Babies / Shoreshim  |
| <input type="checkbox"/> Other preschool                                  | <input type="checkbox"/> Kehillat Noar                    |
| <input type="checkbox"/> PJA Day School                                   | <input type="checkbox"/> United Synagogue Youth (USY)     |
| <input type="checkbox"/> Notz'tzim Hebrew music/activity program          | <input type="checkbox"/> Portland Jewish Youth Initiative |
| <input type="checkbox"/> Kochavim Hebrew immersion program                | <input type="checkbox"/> BBYO                             |
| <input type="checkbox"/> CNS combined 3-Day Hebrew/Religious School (3-6) | <input type="checkbox"/> Other Jewish youth groups        |
| <input type="checkbox"/> CNS Religious School (K-6)                       | <input type="checkbox"/> Junior Kadima                    |
| <input type="checkbox"/> CNS Bar/Bat Mitzvah Training                     | <input type="checkbox"/> Kadima                           |
| <input type="checkbox"/> Private Bar/Bat Mitzvah Tutoring                 | <input type="checkbox"/> Camp Chalutzim                   |
| <input type="checkbox"/> CNS Religious High School (7-12)                 | <input type="checkbox"/> Jewish summer camp               |
|   | <input type="checkbox"/> Other (please specify) _____     |

9. What volunteer work do you participate in at Neveh Shalom? Check as many as are applicable.

- |   |   |
|---|---|
| <input type="checkbox"/> Board of Directors                         | <input type="checkbox"/> Work with seniors  |
| <input type="checkbox"/> Committee chair                            | <input type="checkbox"/> Work with high school youth                              |
| <input type="checkbox"/> Committee member                           | <input type="checkbox"/> Work with K-8 youth                                      |
| <input type="checkbox"/> Religious service leadership/participation | <input type="checkbox"/> Work with Pre-K children                                 |
| <input type="checkbox"/> Social action                              | <input type="checkbox"/> I plan on volunteering soon                              |
| <input type="checkbox"/> Burial society                             | <input type="checkbox"/> I have no interest and/or time to volunteer at this time |
| <input type="checkbox"/> Educational leadership                     | <input type="checkbox"/> Other (please specify) _____                             |

10. In your opinion, what groups in the congregational family could benefit from additional programs and activities? Check the three most important.

- |   |  |
|---|--|
| <input type="checkbox"/> Pre-K children         | <input type="checkbox"/> Jews by choice                      |
| <input type="checkbox"/> K-8 youth              | <input type="checkbox"/> Interfaith couples                  |
| <input type="checkbox"/> High school youth      | <input type="checkbox"/> "Empty-nesters"                     |
| <input type="checkbox"/> Young adults (18-34)   | <input type="checkbox"/> Russian-Americans                   |
| <input type="checkbox"/> Adults (35-64)         | <input type="checkbox"/> Lesbian, gay, bisexual, transgender |
| <input type="checkbox"/> Seniors (65+)          | <input type="checkbox"/> Widows/widowers                     |
| <input type="checkbox"/> Families with children | <input type="checkbox"/> Disabled/physically challenged      |
| <input type="checkbox"/> Single parents         | <input type="checkbox"/> Other (please specify) _____        |

11. When/if CNS raises/obtains additional funds, how would you like to see the money spent? Select three of the following in order of importance, with "1" most important, "2" second most important and "3" third most important.

- |  |  |
|--|--|
| ___ Upgrade exterior of synagogue/grounds  | ___ Expand synagogue endowment fund              |
| ___ Upgrade kitchen                        | ___ Reduce cost of existing educational programs |
| ___ Hire additional clergy                 | ___ Expand youth education/programming           |
| ___ Hire additional professional staff     | ___ Expand adult educational programs            |
| ___ Hire additional office staff           | ___ Expand library collections                   |
| ___ Hire information technology (IT) staff | ___ Expand lecture series/other cultural arts    |
| ___ Improve CNS website                    | ___ Subsidize youth trips to Israel              |
| ___ Expand communication to congregants    | ___ Other (please specify) _____                 |

Questions 12 – 14: Rank the services and programs contained in the following three questions using the following scale. If a specific response does not apply, leave blank.

Very Satisfied – 4    Somewhat Satisfied – 3    Somewhat Dissatisfied – 2    Very Dissatisfied - 1

12. How satisfied are you with the following religious services at CNS? Circle the appropriate response. If a specific response does not apply, leave blank.

1 2 3 4	Friday evening service	1 2 3 4	Weekday evening minyan
1 2 3 4	First Friday service	1 2 3 4	Monthly healing service
1 2 3 4	Chik-Chok	1 2 3 4	Erev Rosh Hashanah
1 2 3 4	Saturday AM service: Sanctuary	1 2 3 4	Rosh Hashanah - Sanctuary
1 2 3 4	Saturday morning downstairs minyan: Zidell Chapel	1 2 3 4	Rosh Hashanah -Downstairs
1 2 3 4	Saturday morning Keva	1 2 3 4	Kol Nidre - Sanctuary
1 2 3 4	Kehillat Noar	1 2 3 4	Kol Nidre - Downstairs
1 2 3 4	Weekend morning minyan	1 2 3 4	Yom Kippur AM - Sanctuary
1 2 3 4	Tot Shabbat	1 2 3 4	Yom Kippur AM - Downstairs
1 2 3 4	Weekday morning minyan	1 2 3 4	Other (please specify)
			_____

13. How satisfied are you with the following educational programs/activities for your children? Circle the appropriate response. If a specific response does not apply, leave blank.

1 2 3 4	CNS Foundation School	1 2 3 4	CNS Babies / Shoreshim
1 2 3 4	Other preschool	1 2 3 4	Kehillat Noar
1 2 3 4	PJA Day School	1 2 3 4	United Synagogue Youth
1 2 3 4	Notz'tzim Hebrew music program	1 2 3 4	Portland Jewish Youth Initiative
1 2 3 4	Kochavim Hebrew program	1 2 3 4	BBYO
1 2 3 4	CNS combined 3-Day Hebrew/Religious School (3-6)	1 2 3 4	Other Jewish youth group
1 2 3 4	CNS Religious School (K-6)	1 2 3 4	Junior Kadima
1 2 3 4	CNS Bar/Bat Mitzvah Training	1 2 3 4	Kadima
1 2 3 4	Private Bar/Bat Mitzvah Tutoring	1 2 3 4	Camp Chalutzim
1 2 3 4	CNS Religious High School (7-12)	1 2 3 4	Jewish summer camp
			Other _____

14. How satisfied are you with the following physical facilities at CNS? Circle the appropriate response. If you do not have an answer for a specific category, leave blank.

1 2 3 4	Main Sanctuary	1 2 3 4	Gift Shop
1 2 3 4	Zidell Chapel	1 2 3 4	Youth Lounge
1 2 3 4	Stampfer Chapel	1 2 3 4	Meeting rooms
1 2 3 4	Social (Birnbach) Hall	1 2 3 4	Restrooms
1 2 3 4	Foundation School	1 2 3 4	Administrative offices
1 2 3 4	Other educational facilities	1 2 3 4	Exterior appearance
1 2 3 4	Library	1 2 3 4	Synagogue's location
1 2 3 4	Kitchen	1 2 3 4	Other (please specify)
1 2 3 4	Parking supply/location		_____

15. With regard to your use of technology, do you do any of the following?

- |   |   |
|---|---|
| <input type="checkbox"/> Email                        | <input type="checkbox"/> Use CNS's automatic payment withdrawal service |
| <input type="checkbox"/> Pay bills online             | <input type="checkbox"/> Blog   |
| <input type="checkbox"/> Use the Neveh Shalom website | <input type="checkbox"/> Use social media (e.g. Facebook, Twitter)      |

16. How often are you online/browse the Internet?

- |   |  |
|---|--|
| <input type="checkbox"/> Never                | <input type="checkbox"/> Every day           |
| <input type="checkbox"/> Rarely               | <input type="checkbox"/> Several times a day |
| <input type="checkbox"/> Once or twice a week |  |

17. How satisfied are you with the following Neveh Shalom communications?

Very Satisfied - 4

Somewhat Satisfied - 3

Somewhat Dissatisfied - 2

Very Dissatisfied - 1

1 2 3 4	The Chronicle	1 2 3 4	Communication from youth educational programs
1 2 3 4	Auction and other major event invitations	1 2 3 4	'This Week at CNS' email
1 2 3 4	Fundraising information	1 2 3 4	Weekly Parshat e-mail
1 2 3 4	High Holiday information	1 2 3 4	Clergy emails
1 2 3 4	Other holiday events	1 2 3 4	Professional staff email/phone response
1 2 3 4	Information about volunteer opportunities	1 2 3 4	Administrative staff email/phone response

**This is the open-ended response section, please feel free to be extensive with your comments.**

18. Congregation Neveh Shalom relies heavily on volunteerism from its congregants. We all share the responsibility to build our synagogue community. What would make volunteering easier for you (and your family)?

19. Communication is very important, whether in a marriage, a family, a friendship or a business. How can communications between Congregation Neveh Shalom, the congregants and the community be enhanced?

20. What do you like most about Congregation Neveh Shalom? (You may attach an additional sheet.)

21. What do you like least about Congregation Neveh Shalom? (You may attach an additional sheet.)

22. Are there any other comments that you would like to add? (You may attach an additional sheet.)

23. Please provide some demographic information.

Age:

- 13 - 18
- 19 - 22
- 23 - 34
- 35 - 44
- 45 - 54
- 55 - 64
- 65+

Gender:

- Female
- Male

Marital Status:

- Single
- Married
- Domestic partner
- Divorced
- Widowed

Number of Children Living at Home:

- None
- 1
- 2
- 3
- 4 or more

Length of CNS Membership (in years):

- Not a member yet
- Less than 1 year
- 1 – 4
- 5 – 10
- 11 – 19
- 20+

Zip Code of Residence:

Closest major intersection to your home:

**THANKS FOR YOUR PARTICIPATION. THE INFORMATION THAT YOU HAVE PROVIDED WILL BE USED TO MAKE CNS MORE RELEVANT AND RESPONSIVE TO YOUR FAMILY'S NEEDS.**

**APPENDIX G**  
**SUMMARY OF CONGREGATIONAL LEADERS' WORKSHOP**  
**(12/5/10)**

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On 12/5/10, 50 CNS leaders, including members of the Board of Directors, Past Presidents' Council, and Long-Range Planning (LRP) Committee; committee chairman; and senior staff and clergy, attended a three-hour leadership workshop to review the findings of the LRP Committee to date and establish the priorities for further analysis and ultimate recommendations.

**Community-Building (43 Votes)**

1. Improve engagement and participation: newcomers and all congregants.
2. Increase use of internet communication.
3. Close gap between professional staff and lay leadership.
4. Provide professional development training.
5. Provide leadership training for volunteers.
6. Consider implementation "Synaplex" idea .
7. Define retention programs for specific targeted groups (e.g., post b'nai mitzvah families, seniors).
8. Employ dynamic clergy to attract members.
9. Improve first impression: welcoming, education opportunities, website.

**Education (40 Votes)**

1. Undertake cutting-edge, comprehensive education reform.
2. Address declining participation.
3. Consider establishing all-day Foundation School/kindergarten.
4. Establish task force to evaluate satisfaction index and/or establish measurable outcomes to evaluate satisfaction and efficacy.

**Financial Stability (35 Votes)**

1. Retire capital campaign debt.
2. Build endowment (formal program to raise 5X operating budget within 10 years).
3. Develop a financial contingency plan: What if membership doesn't increase? Alternative growth and revenue scenarios.

**Technology (17 Votes)/ Reorganization of Administration (15 Votes)**

1. Undertake a comprehensive assessment and overhaul of technology and communication targeting subgroups according to interests.
2. Plan for short- and long-term needs: website, computer system.
3. Consider engaging with other community organizations in cooperative ventures (e.g., Jewishportland.org).
4. Provide professional development for staff on use of technology to best support congregational needs.