

2020-2021 LONG-RANGE PLAN

FOR

CONGREGATION NEVEH SHALOM

AUGUST 15, 2021

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EXECUTIVE SUMMARY

Strong, vibrant and caring communities are built through intention and planning. At the request of the Board of Directors, Glen Coblens engaged Stephanie Arnheim & Nathan von Colditz (co-chairs) and Leah Conley (staff liaison) to work on a long-range plan in March 2020. With a committee of 17 amazing leaders, the LRP committee embarked on an 18-month process to close the gap between who we are and who we can be.

Wanting to ground our work in the values of our congregation, the committee first addressed forming an updated mission statement and creating vision and values statements to ground all future work of the LRP. The vision, mission, and values were created through collaboration with staff, clergy and other leaders in the community and approved by the board of directors, which served as a guide for the LRP work throughout the remainder of the process. We wondered, how can we design a congregation that would achieve our new mission?

We began by exploring questions of fiscal health, long-term sustainability, facilities, staffing and succession plan of the Executive Director position.

Three subcommittees were created to deeply explore these topics. The subcommittees were:

- A) Business of the Synagogue
- B) Social & Engagement
- C) Spiritual & Education

Each subcommittee conducted their own discussions, and as a group we engaged in empathy interviews with current and former congregants of multiple affinity groups, demographics, and relationship to the synagogue. Additionally, a congregational survey was conducted with over 300 responses to gain a clearer understanding of the needs and concerns of the congregation. The intersection of the multiple approaches resulted in clearer understanding of the common themes for the committees to address. The LRP process also coincided with the onset of the COVID pandemic which also meant that these processes were conducted with congregants while isolated in their homes and unable to be in community other via Zoom. This almost certainly impacted our recommendations around technology and Relational Judaism due to the impact of this experience.

From the subcommittee conversations and empathy interviews we heard unique stories, but similar themes emerged over and over – the deep need for connection and belonging. At our best, our congregants felt seen, heard and cared for during celebration and loss. At our worst, we heard stories of loneliness, missed connections and a longing for community and a Jewish connection. The majority of our recommendations stem from this desire to bring living Relational Judaism to our Conservative Jewish community in the Pacific Northwest.

Other recommendations address staff restructuring, financial health of the congregation and facilities which were all part of the initial questions we began with.

With the five new values of the congregation in place, leadership understood the need reflected in these recommendations and took immediate action by creating two new positions directly recommended. These positions are the Director of Engagement and Innovation and a Youth & Family Engagement Associate.

To ensure the successful implementation of the LRP findings we recommend the Board create two committees:

- 1) LRP Coordinating Committee - to monitor and implement the recommendations
- 2) VMV Rollout Committee - to bring awareness of the new values and find ways to better incorporate these into CNS life

A Jewish community at its best reaches out and embraces each of its members. In doing so, we hope to partner with each member on their own authentic journey.

HOW TO USE THIS DOCUMENT

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: Synagogue Overview Highlights the demographic and membership statistics of Congregation Neveh Shalom.

Chapter III: Vision Mission and Values This section describes the process the LRP team went to define the new Vision, Mission, and Values.

Chapter IV: Synthesis of Subcommittees and Work This multi-section compendium walks through the gathered data from interviews, and the LRP process to arrive at the recommendations. In this section the LRP presents the **process** in which the committees arrived at the **main themes** that emerged from committee work followed by the **Summary Recommendations** and then the longer prose of the **Detailed Summary of Subcommittee Findings**.

Chapter V: Implementation Strategy This section presents a draft plan of potential implementation strategies for moving the committee recommendations forward.

Chapter I: INTRODUCTION

Purpose. At the direction of the Board of Directors, the Long Range Planning (LRP) Committee has been meeting since May 2020 to develop a 3 to 5-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) Long term fiscal health
- 2) Long term sustainability
- 3) Facilities & infrastructure
- 4) Staffing structure
- 5) Succession planning for Executive Director position

Planning Process. The proposed 5-year plan described in this document is the work of a 17 member Long Range Planning Committee (Appendix B), comprised of volunteers from the congregation's membership.

- **Organize LRP Committee (March - April 2020):** The two co-chairs, along with the staff liaison worked to define the team, set goals and work schedule, and review previous materials. This process was organized into three workstreams:
 - Business of the Synagogue
 - Social and Engagement
 - Spiritual and EducationDuring the planning process a fourth track was contemplated to discuss **synagogue governance**. However, after discussion with leadership, it was determined the work to retool governance processes around how the Board operates was already underway with other committees and therefore was dropped.
- **Create Vision, Mission and Values Statements (May - December 2020):** Early in the process, it became clear that to properly ground recommendations and analysis, the committee, with support of the Board and leadership, set out to define new vision, mission and values for the congregation.
- **Undertake Extended Research of Internal/External Conditions (January - June 2021):** Through the research done for vision, mission and values research, committee meetings, empathy interviews with clergy, membership, past membership and Board meetings, along with a survey, data was gathered to work through potential observations, findings, and recommendations.
- **Finalize Recommendations and Prepare Final Report (July - August 2021):** Create final work product by workstream and compile final recommendations for submission to the Executive Committee and Board.
- **Adopt Plan and Begin Implementation (September 2021 - Ongoing):** Implementation and adoption of recommendations, further research, and potential further research as the synagogue returns to in-person events and services.

A unique time:

- **COVID-19.** In March 2020, which coincided with the beginning of the formation of this LRP Committee, the global COVID-19 pandemic erupted, causing disruption worldwide and here at home. Congregants could not attend services in-person. No classes were held in person for the students. The LRP Committee, too, conducted all of its business online and believed it necessary to factor the long-term effects of the pandemic into their recommendations with regard to programming and services provided by CNS staff and clergy.

During the entire LRP process, the team met virtually for its committee, leadership and Board meetings, and interviews; not once were we able to meet in person as we worked toward completion of the comprehensive LRP planning process.

- **Social unrest:** early in the COVID-19 pandemic, sparked by the murder by a police officer of an unarmed Black man in Minneapolis, Minnesota, sparked, too, a statement of solidarity by CNS with the local Black community.
- **Unparalleled political climate:** in a hotly contested 2020 election cycle marred by accusations of election impropriety nationwide, the election became further complicated by the events of January 6, 2021, when the U.S. Capitol was stormed by individuals looking to pause the electoral process. Several Americans died, and many onlookers watched the news, shocked and saddened by the events that were unfolding in front of their eyes.

The political unrest drove great division between citizens of the United States and added to the complexity of most communities around the country, CNS' included.

- **Isolation:** the pandemic confined many to their homes for several weeks that for many turned into months. Following the roll out of protocols for social distancing and mask-wearing and while people were able to engage in some normal activities like going to the store, many institutions were required to close due to regulations limiting large gatherings, thus affecting restaurants, gyms, offices and places of worship. CNS too had to close its doors and switch to reaching its community via Zoom and livestream opportunities.
- **Loss:** communities far and wide were impacted. While Oregon did not suffer as other states' populations did at the height of the pandemic, people everywhere faced loved ones' deaths, shuttered businesses, the strain of financial loss and more. The U.S. dealt with one of the largest and most protracted job-market contractions ever in modern history.

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

1. What is the mission and vision of the synagogue moving forward? Is the current statement telling the story of who we are as a congregation and what we believe?
2. What are the big issues we need to address in order to support and realize the vision and mission of the synagogue in the long run?
 - Succession planning for the Executive Director position
 - Financial stability - post CNS-150 considerations and endowments

- Aging membership - continued trend of membership aging
 - **Identified later in the planning process** - what is the impact of COVID and what improvements made during COVID should remain beyond the pandemic?
3. What are the values of the synagogue as the world and our country evolve as well as in the Conservative Jewish community? How do we take action from these values with the confluence of events of 2020 - COVID lockdown, George Floyd's murder, and the political climate?
 - What is the vision that aligns us to the mission?
 - How is that reflected in key values?
 - What do our congregants need to feel connection and belonging in this new world?
 4. Where should the synagogue provide impact? Do all the groups have a purpose aligned with the synagogue? What about the dormant groups without leadership (e.g., Tikkun Olam)?
 - What are the active groups? What are the inactive groups?
 - What is the support that is needed to create more cohesion between the CNS mission and the activity groups?
 5. How do we ensure opportunities for all congregants to feel connection to Judaism and CNS through their passions?
 6. How do we elevate voices in the big tent? How does the synagogue make sure that all voices are heard and that all concerns are considered when thinking about the synagogue moving forward?
 - What groups have strong representation?
 - Which groups lack the representation needed?
 - Are there any issues of equity to consider?
 7. What is the lifecycle of a synagogue member? How can we help our congregants feel connection and belonging for all the days of their lives?
 - When do people tend to leave? Why?
 - When do people join? Why do they stay?
 - Where are the opportunities to elevate membership to new levels?
 - Do we have the right programs for our membership?
 - How do we generate the next generation of leaders for the synagogue? Who are those leaders? How are they identified? How do we grow them to succeed/for success?
 8. Does staff structure match the needs of the congregation? Are there gaps?
 9. Are there changes to the current Jewish community in Portland that should be considered as CNS moves forward? What are the considerations and how should CNS respond?
 10. How does CNS need to reimagine outreach as the current membership changes? What is the role of outreach in maintaining a strong membership and meeting the current members where they are?

Chapter II: Synagogue Overview

Congregant Characteristics. Based on the congregational profile:

About 832 families with 2,311 individuals.

- The 2,311 includes about 1,700 (74 percent) adults and 611 (26 percent) children.
- Gender is about 50 percent (male)/50 percent (female).
- Of these 832 households (HH), 2/3 are headed by two adults, with single adult headed HHs accounting for the other third.

CNS households with children.

- About 38% (313) of CNS HHs have children.
- Of HHs with children, 72% (225) have two or more children, and 28% one child.

CNS has many long standing members.

- The average HH has been a member for 20 years.
- 48% of our current members have joined CNS since 2005, with an average of about 24 members joining annually since then.
- Of long standing members, 36% of HHs have been members for 25+ years, and almost one in ten members have been affiliated with CNS for 40+ years.
- 2019 was the year more current members joined than any before or since (41).

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 45 years compared to the national median age of 37.
- In addition to our 1,700 adult heads of HHs, the congregation has 352 adult children (15 percent) who are members.

Diversity of age ranges

- More individuals are in their 30's than in any other 10 year cohort (15 percent).
- About 10 percent are in their 20s, 15 percent in their 30s, and 13 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 95 percent of CNS members live in the Portland metropolitan area, with 2 percent in Washington and remaining 1 percent elsewhere.
- About 1/2 of all HH's live in six zip codes: 97219 (12 percent), 97225 (9 percent), 97221 (8 percent), 97239 (6 percent), and 97223 (7 percent).

Demographics conclusion:

- Membership has reduced by 9% over the 10 years since the last LRP. In 2014, a roster clean up was done where a significant number of "ghost" members were removed which influenced the reduction in members percentage.
- Membership location is consistent with a majority living in the top 6 zip codes.

Chapter III: Vision / Mission / Values (VMV)

- There was an immediate need to galvanize around a cohesive vision, mission, and values statement, which led the team through the majority of its 2020 work.
- Our vision and mission are built on five values - Community, Innovation, Jewish Life, Inclusivity, and Transformative Learning. The mission grounds the kehillah in its unique Pacific Northwest roots, and the vision reflects our desire for a more humane world with a path to achieve it.

The values, vision, and mission process involved more than 65 participants representing a diverse range of congregants and leaders in the CNS community, including CNS staff, clergy, Board, LRP Committee and Executive Director. All engaged in discussion, surveys and/or interviews.

The Long Range Planning Committee leadership also reviewed various vision, mission and values statements from other Conservative and Reform congregations across the country both large and small.

Process for Vision Mission Values Development

It became clear early on in the process that we needed shared core beliefs and vision in order to ground us in this work. As a result the committee decided to focus on updating our antiquated Vision, Mission, and Values as the first step in this process. Through shared workshops with more than 65 community members across affinity groups, ages, etc., including staff, Board of Directors, clergy, and a variety of congregants, we developed a list of shared values with which to begin this work. From the shared values that emerged (see following tables), themes became evident.

We then reached out to congregations across the country from multiple backgrounds and sizes, and as part of our research we collected other VMVs to consider. As part of this step, we also reviewed the mission and values from USCJ.

With all this data collected, we then worked with a smaller leadership team to develop language for our Vision, Mission and Values, which was then reviewed by clergy, Board leadership, staff and the whole LRP Committee. After arriving at a final draft, this was reviewed by all stakeholders before approval by the Board of Directors.

Visioning survey outputs

LRP Committee Shared Values

Adaptability	Curiosity	Honesty	Mindfulness	Security
Abundance	Dedication	Humility	Motivation	Selflessness
Acceptance	Diversity	Humor	Open-Minded	Spirituality
Achievement	<u>Dor v'dor</u>	Impact	Optimism	Stability
Adaptable	Empathy	Inclusiveness	Passion	Sustainability
Advocacy	Empowerment	Independence	Peace	Teamwork
Appreciation	Ethical	Innovation	Positivity	Thankfulness
Authenticity	Family	Inspiration	Recognition	Thoughtfulness
Balance	Flexibility	Integrity	Relationships	Tikkun Olam
Be the change	Friendship	Jewish-identity	Reliability	Tradition
Being	Generosity	Joy	Resilient	Transformation
Caring	Growth	Kindness	Resourcefulness	Trustworthiness
Community	Happiness	Knowledge	Respect	Understanding
Compassion	Hard-Work	Leadership	Responsibility	Uniqueness
Cooperation	Health	Learning	Sacredness	Warmth
Creativity	Helping	Love	Safety	Well-Being
				Wisdom

Staff Shared Values

Adaptability	Curiosity	Honesty	Motivation	Selflessness
Abundance	Dedication	Humility	Open-Minded	Spirituality
Acceptance	Diversity	Humor	Optimism	Stability
Achievement	<u>Dor v'dor</u>	Impact	Passion	Sustainability
Adaptable	Empathy	Inclusiveness	Peace	Teamwork
Advocacy	Empowerment	Independence	Positivity	Thankfulness
Appreciation	Ethical	Innovation	Recognition	Thoughtfulness
Authenticity	Family	Inspiration	Relationships	Tikkun Olam
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Cooperation	Health	Mindfulness	Safety	Well-Being
Creativity	Helping		Security	Wisdom

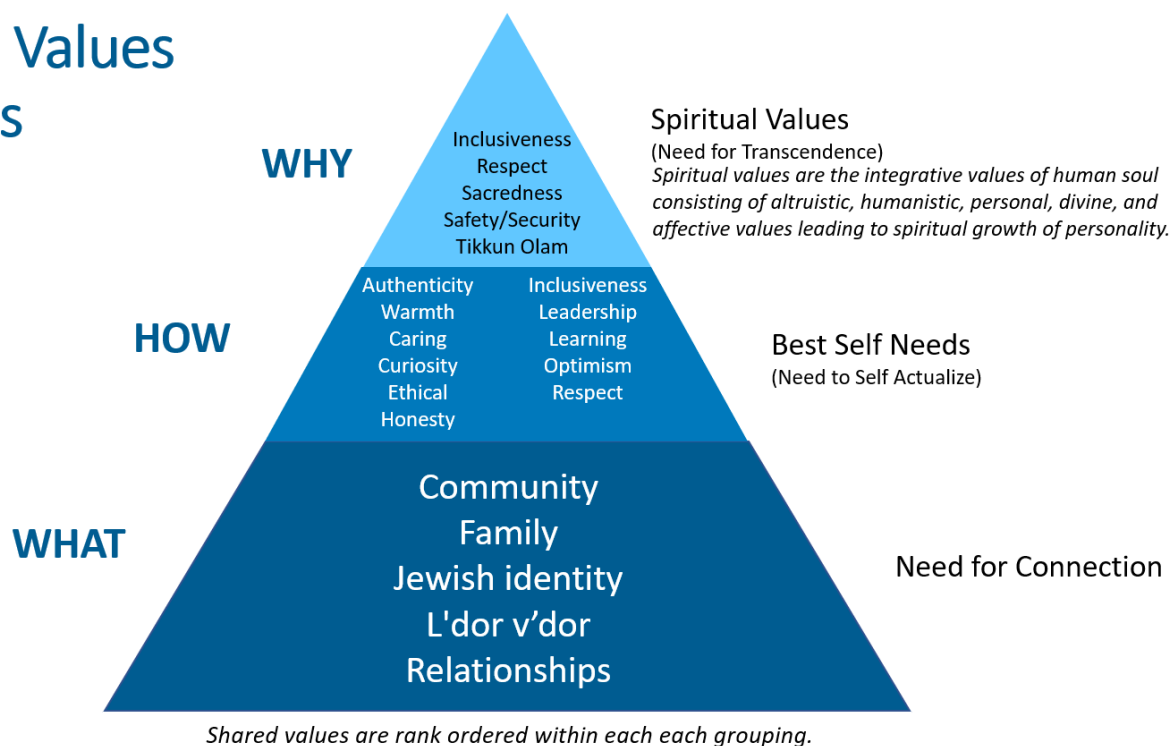
Staff Core Values

Trustworthiness	Compassion	Be the change	Community
Honesty	Kindness	Creativity	Dor v'dor
Respect	Appreciation	Adaptability	Relationships
Reliability	Understanding	Flexibility	Teamwork
	Acceptance	Innovation	
	Warmth		

Output Framework

With the details of each of the groups, interview notes, the LRP leadership team along with its committee refined the detailed values that then fed a mission and ultimately a vision for Congregation Neveh Shalom.

LRP Committee Shared Values Themes



○

Final Product of VMV

1. **Vision:** A more humane world cultivated through Jewish living, learning, and celebration
2. **Mission:** To foster and preserve an inclusive, authentic, and engaging experience of Conservative Judaism in the Pacific Northwest

Through meaningful lifecycle events, spiritual, educational, and social experiences, we become our best selves, strengthen connections to each other, and forge positive change in the world

3. Values:

a. **Community – Kehillah**

Acting with courage, honesty, and integrity, we share meaningful moments where new relationships are forged, and old ones live on that shape our lives with connections to each other

b. **Innovation – Chidush**

Bringing the best of our creative Jewish wisdom, we encourage and develop new and innovative solutions to close the gap in our vision between what is and what can be

c. **Jewish Life – L’Dor V’Dor**

Embracing tradition and change, we engage in Jewish ritual, celebration and prayer, becoming an enduring family within our synagogue, keeping a vibrant relationship with Israel and the greater Jewish world, now and for generations to come

d. **Inclusivity – K’lal**

With acknowledgment of the divine spark in each of us, we create a culture of belonging where people of all diverse backgrounds and identities—such as religious observance, race, ethnicity, ability, gender, or sexuality—are all embraced

e. **Transformative Learning – Talmud Torah**

We strive to deepen our understanding of Judaism on the lifelong path to becoming our best selves and creating a more humane world



CONGREGATION NEVEH SHALOM Vision, Mission, and Values

Our Vision A more humane world cultivated through Jewish living, learning, and celebration

Our Mission To foster and preserve an inclusive, authentic, and engaging experience of Conservative Judaism in the Pacific Northwest.

Through meaningful lifecycle events, spiritual, educational, and social experiences, we become our best selves, strengthen connections to each other, and forge positive change in the world

Our Defining Values

Community – Kehillah

Acting with courage, honesty, and integrity, we share meaningful moments where new relationships are forged, and old ones live on that shape our lives with connections to each other

Innovation – Chidush

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Transformative Learning – Talmud Torah

We strive to deepen our understanding of Judaism on the lifelong path to becoming our best selves and creating a more humane world

VMV Process overview

Following the approval of the Vision, Mission and Values, the LRP work moved forward with three subcommittees: Business of the Synagogue, Social & Engagement, and Spiritual & Education. These committees met regularly to begin tackling the questions posed at the start of the process.

During this LRP process, one of our LRP Committee members, Karen Twain, suggested using empathy interviews as a way to learn more about the needs and conditions for a satisfying spiritual experience with staff, clergy and cycles of one's life. It is a newer concept that is being used more in many workplaces and educational settings to understand people's real-life experiences that can be used as a guide to create stronger and more relevant final LRP recommendations.

Empathy interviews are brief interviews between an interviewer and the interviewee. A scribe is often on hand to help take notes so that the interviewer can stay focused. It is a brief interview lasting about 15 minutes and consists of about four open-ended and story-based questions.

A subcommittee was formed and the interviews were scheduled. All of our interviews were done by Zoom. Interviews were held with current and past congregants of all ages and backgrounds, as well as lay leaders and Board members. Rabbi Kosak, Rabbi Posen and Cantor Bitton were interviewed as well as a few staff members. Every interview was kept confidential and the key data was shared with the co-chairs and task force leaders.

The whole process was very enlightening and helpful to the LRP process. We are hoping that empathy interviews could be used by staff and committees in the future.

Simultaneously, a congregation-wide survey went out to the community to gather input.

Chapter IV: Synthesis of Subcommittee Work

Introduction

In this section the LRP presents the **process** by which the committees arrived at **main themes** that emerged from committee work followed by the **Summary Recommendations** and then the longer prose of the **Detailed Summary of Subcommittee Findings**.

A. Process

Through the process of discussions in subcommittees and in the larger LRP committee, empathy interviews and congregational survey, themes emerged that drove the conversations and recommendations at the committee level. Below is a summary of the themes that emerged.

B. Main Themes

- **Community that embraces all**

- Embrace all of the membership within the lens of Conservative Judaism
 - Using the guiding values of USCJ and halacha (Jewish law) that is consistent with the Conservative Movement, we welcome all to participate whole-heartedly with us in our Jewish journey as individuals and as a community.
- Our long history with our families and welcoming approach to all has created a community that feels like home.
- We value these relationships above all else, and our Jewish experiences together deepen that connection.
- We believe in inclusion and welcome a variety of Jewish observance, interfaith families, LGBTQ Jews, Jews by choice and more.
- We welcome people where they are and believe that the diversity of our congregants creates a unique and vibrant community.
- "Judaism needs to be available for all and speak to all." – CNS Clergy
- Big Tent – we offer so much for so many different congregants.
- "CNS has had a culture of spiritual entrepreneurship with congregants participating in the creation of programs. They are given freedom to invent and create." – CNS Clergy
- Our warm and welcoming "big tent" community is vibrant, relevant and inclusive.

- **Neveh Shalom nurtures individual growth**

- Beginning with Foundation School, then ALIYAH and adult learning, we nurture lifelong learners.
- Rabbi Stampfer's (z'l) enduring belief in empowering individuals, the spirit of "you can do this and I will help you" is a cornerstone of how Neveh Shalom connects and serves people.
- We seek to encourage and foster the work that each of our members does for our community and out in the world.
- Staff appreciate leadership encouragement to "go for it," providing them autonomy with access to guidance.

- Neveh Shalom fosters thriving Jewish life in Portland and the Northwest through the organizations started and led by people in our community.
- Supportive, caring and trusting relationships nurture individuals to become their best selves and create future leaders for our community.
- **Communal growth necessitates more structure**
 - While Neveh Shalom has had clergy and staff with very long tenures, there has recently been some turnover
 - Clergy, staff, Board members and Board committees need objectives, roles and responsibilities outlined
 - Lack of clarity is causing confusion and frustration
 - Lack of information is causing inefficiencies and missed opportunities
 - Lack of accountability is eroding trust, confidence and good will
 - Additional staff concerns around equity require a more structured approach to pay and benefits
 - There is a need for a structural approach to decision making to help all do their best.
- **We can strengthen connections**
 - A big tent welcomes all, but makes communal experience challenging:
 - Clergy crave more opportunities to daven all together, especially when regular service goes more often attend lay-led services than clergy-led (often b'nai mitzvah services).
 - Many program options make it challenging for newcomers to find their people.
 - Many young families create meaningful connections, but post b'nai mitzvah, families, single people and older couples have a harder time staying engaged in synagogue life.
 - Some expressed concern that we offer too many small programs instead of more meaningful and compelling bigger ones.
 - A communal shared purpose can create more intimate and meaningful connections.
- **Synergistic visions for the future**
 - Board is focused on financial stability and community engagement (attract and retain diverse members).

"CNS is a place people look to as an example of equity, respect, connection, upliftment, rooted depth, spiritual honesty, community, communication, and love." – CNS Board member
 - Staff is focused on equity and clearer mechanisms for decision making with accountability and more innovative, meaningful programming.

"Ensure that the egalitarian ideals of our congregation become the working reality." – CNS staff
 - Continue to grow AND live by our values.

- **Connection**
 - Through the empathy interviews, survey, and committee meetings, there is a clear desire for more connectivity and belonging.
 - Congregation Neveh Shalom has a concept of “the big tent”, which is representative of a place that can fit everyone; it is clear from the research that not everyone feels this way.
- **Seasons of membership**
 - It is clear that CNS, like many synagogues, struggles to keep membership through transitions (e.g., post bar / bat mitzvah, post marriage). The greatest attachment to the synagogue is during life cycle events (e.g., birth, marriage, deaths)
 - Investment is clearly needed to keep membership involved after the big events. Transitions are the key time to lose membership or give them the reason to stay.
- **Relational Judaism**
 - CNS must transform so that congregants feel known, heard and embraced. Systems must be put in place to support and facilitate connection we have to one another and to the Synagogue, and to ensure consistent follow up by clergy, staff and lay leaders with congregants experiencing illness and loss. The transformative value of making relationships and truly getting to know congregants, in essence becoming a family, cannot be understated. We believe a pivot to a relationship priority will empower CNS through the expected challenges to Conservative Judaism over the next decade and create the kind of *Kehilla* (community) with which both current and future members will want to be affiliated.
 - Staff must put in place accountability systems to ensure proper follow up, including making sure the clergy meets with new members, members experiencing illness, members experiencing *simchat* (joyful celebrations) and ultimately with all members. We recommend that a new clergy/staff position be created akin to a Director of Congregational Engagement and Outreach to help create small groups, to help with seeking, training and thanking volunteers, to help with connecting new members to the *Kehilla* and to serve as a trainer to the rest of clergy and staff for how to create a truly transformative relational *Kehilla* (Position was added in July of 2021).

C. Summary Recommendations

In this section, you will find the detailed recommendation of the LRP committee derived from the detailed summary readouts. Each recommendation is grouped by the recommending subcommittee (which can be one or multiple) and then the area of the recommendation. The intent of the area recommendation is to allow for the implementation to easily group similar activities and assign to leadership at the Board and staff level to work with and eventually implement if it is determined to be a recommendation meriting action.

#	Group	Area	Recommendation	Detail
BUSINESS OF THE SYNAGOGUE SUBCOMMITTEE RECOMMENDATIONS				
1	BUS	Financial	Financial transparency	Better education of our Kehillah about the actual costs and need for greater annual giving, not just how much is needed but why and what the long-term benefit can be; in effect, define the value proposition with greater clarity, comparably to how universities/museums etc leverage value to higher donations; do periodic reporting on finances in the Chronicle (including thanking donors) and do an annual report each June or July that demystifies CNS' finances and helps educate the Kehillah on how funds are expended and what needs remain unmet due to lack of sufficient fundraising
2	BUS	Financial	Cost Cutting and Cost Sharing Measures	Explore cost cutting and cost sharing with other organizations in our community
3	BUS	Financial	Revenue Generating Activities	Explore activities that could attract revenues from third party affiliations with CNS
4	BUS	Financial	Donor Incentives	Design attractive incentives/events for donors \$5000 and above.
5	BUS	Financial	Adult Education Class Fee Reduction	Offer Adult Ed for free to congregants. Eliminate the "nickel and diming" effect.
6	BUS	Financial	Endowment	Use the Grinspoon/Foundation Life endowment program to increase and create a

				meaningful endowment program for CNS.
7	BUS	Financial	Free membership to B’Nai Mitzvah students	Offer a free membership through age 26 to post B’Nai Mitzvah students, independent of whether their family remains at CNS.
8	BUS	Financial	Voluntary Dues Model	Study and implement a voluntary dues program for young adults 35 and under.
9	BUS / SPE	Innovation	Create a “think tank”	Twice a year, offer to the congregation a “think tank” to generate ideas on improvement. Beginning should be allocated to ideas for building youth and young adult experiences. Develop programs and ritual activities that honor and support transitions between different phases of our education programs.
10	BUS	Innovation	Member Appreciation	Acknowledge those that participate and ensure proper follow-up and appreciation. Encourage those less likely to raise their hands.
11	BUS	Innovation	Create a working budget for Innovation	Find or create funds to seed innovation. Possibly offer a bonus to staff who suggest innovation that is implemented.
12	BUS	Innovation	Develop measurement standards	Have the Board develop measurement standards to track the impact of innovation expenditures. Work with lay leaders and clergy/staff to create balance of priorities.
13	BUS	Marketing	Enhanced communications	Work with the communications team to create crisper, coordinated and more targeted communications with written copy and social media presence.
14	BUS	Outreach	College outreach	Improve outreach to CNS kids at college by involving clergy, staff, Board members and

				parents.
15	BUS/SPE	Relational	Empathy Interviews	Adopt using empathy interviews as a regular practice for engaging in listening to our community and ever-changing needs of all of our congregants. For example, when congregants leave CNS as well as engaging youth.
16	BUS	Relational	Relational Judaism	Study and adopt Relational Judaism practices as further detailed in the BUS Subcommittee findings.
17	BUS	Relational	Pre-membership engagement	Concerted effort by clergy/staff to deepen relationship with kids who grew up at CNS, via outreach social events during High School and College and via social and professional development opportunities post-graduate; define success to include affiliation by those kids either with CNS or with other synagogues, as goal is keeping the “Jewish flame” alive and feeding that flame through High School, College and into their 30’s.
18	BUS	Relational	Events for 20s/30s	Create more events for 20’s/30/s to encourage their participation in our community. Ensure the purpose of these programs is to build connection and belonging. As close to free as possible to prevent money from being a deterrent.
19	BUS	Relational	Young Adult community outreach	Work on improving outreach to other Oregon Hillels and unaffiliated young adults throughout the year with Shabbat meals and other experiences. Ensure there is focus of these programs are connection and belonging for attendees.

20	BUS	Relational	Building relationships with members	Provide unstructured time for clergy and staff to reach out to members to deepen relationships.
21	BUS	Relational	Attend Morning Minyan	Encourage clergy and senior staff to attend Morning Minyan and help create a stronger relational relationship.
22	BUS	Relational/ Staffing	Create Director of Innovation and Engagement	Create a position to promote and instill relational Judaism into Synagogue culture. Help with programming to create more time for Membership staff to deepen relationships.
23	BUS	Staffing	Hire organizational consultant	Hire a consultant to assist clergy, ED and Executive Committee to evaluate how each clergy/staff member utilizes their time. Improve productivity, efficiency, accountability and morale.
24	BUS	Staffing	Evaluate technology systems	To help improve productivity and decrease workloads
25	BUS	Structural	Long Range Planning Implementation Committee	This committee will be responsible for coordinating, monitoring and reporting back to the Board progress toward implementation following the passage of this LRP Plan.
26	BUS	Structural	Vision Mission Values Rollout Committee	This committee is designed to roll out the adoption of the VMV to the congregation through various activities and projects.
27	BUS	Building Structure	Hire interior design professional	Hire interior designer to give input on making the inside space more harmonious (like Stampfer Chapel). Will help attract new members.
28	BUS/SPE	Building	Improve wifi and technology	Use building fund money to improve wifi and sound system for both in the building and for

		Structure		remote engagement. Pay attention to special needs of older congregants, people who are ill or have moved away.
29	BUS	Technology	Technology Task Force	Establish a technology task force to evaluate ShulCloud to ensure its capability to provide clergy/staff with better information about congregants to enhance relational connections.
30	BUS	Technology	Improve Social Media Outreach	<p>Use social media to better reach out to unaffiliated younger Jews and those Jews relocating to Portland. Key areas to focus on include:</p> <ul style="list-style-type: none"> - Facebook - Instagram - Twitter - Website
SOCIAL & ENGAGEMENTS SUBCOMMITTEE RECOMMENDATIONS				
31	SOEN	Committee & Volunteer roles	Committee mission statements	Have committees create clear Mission statements tying them back to the Values
32	SOEN	Committee & Volunteer roles	Committee Chairs restructuring	Have at least 3 members at large to chair a Committee. Review annually all committees and leadership.
33	SOEN	Committee & Volunteer roles	Committee Fair	Annually hold a Committee Fair to the whole congregation so that others can learn about what is being offered.
34	SOEN	Committee & Volunteer roles	Volunteer coordinator	Find a congregant to be the Volunteer Coordinator to help build the committees.
35	SOEN	Library	Showcase library offerings	Highlight books through articles around the holidays and other special topics

36	SOEN	Library	Create book groups	Create book groups in cooperation with Sisterhood, Men's Club, Aliyah parents or create a "Everybody Reads" program.
37	SOEN	Leadership Training	Create a Leadership Lab	Create a Leadership Lab to grow new leaders for volunteering and future Board opportunities.
38	SOEN	Leadership training	Leadership support for committees	Committee chairs should meet every 6 months to review missions and issues.
39	SOEN	Leadership training	Training for Board and Committee members	All Board and Committee members should receive leadership training and development on an annual basis.
40	SOEN	Membership	Create continuous interactions with new members	Develop a program from the beginning of membership with a "tour" as well as create other interactive opportunities to help retention.
41	SOEN	Outreach	Revise membership content	Revise membership recruiting content to be more relational.
42	SOEN	Outreach	Create networking opportunities for young adults	Create opportunities for better networking and engagement with college students through Hillel and other young adults in the community.
43	SOEN	Outreach	Develop marketing plan for relationship building	Develop a marketing plan with opportunities for "off-campus" relationship building with CNS clergy, staff and Board
44	SOEN	Outreach	Value proposition for young adults	Create a cogent statement of the value proposition of membership to young adults. Create a "Road Map to Membership."
45	SOEN	Outreach	Identify where new congregants are located	Identify where new congregants are and focus on key areas (by quantity). Such places as: <ul style="list-style-type: none"> - Federation - Hillel/College - Non-profit/local social groups - Moise House Create long-term partnerships

46	SOEN	Relational	Establish new member protocol	Have clergy meet one-on-one with new members within first 60-90 days of joining CNS. Report visit with Membership Committee. Encourage Board members and Staff to meet with new members as well.
47	SOEN	Relational	Review current process and make more relational	Establish new congregant resource package; review what was done and what can be improved to make new congregants feel more welcome.
48	SOEN	Relational	Pair new congregants with existing congregants	Create stronger connections by pairing new members with existing members) to strengthen the relationship.
49	SOEN	Social engagement	Networking opportunities for all members	Provide networking opportunities between generations. Create mentorships. Provide networking opportunities with congregants who have similar careers, interests and experiences.
50	SOEN	Social engagement	Create meaningful social events	<p>New relationships can be formed with a variety of social events for congregants to participate in. Ideas such as:</p> <ul style="list-style-type: none"> - "Kosher" wine club and food tasting - Job and career fair - Sporting event - Concert or theater event - Dance/Prom/Gala at CNS - Heritage cooking class - Language group - Ask congregants for ideas
51	SOEN	Social engagement	Create a Shabbat cycle	Highlights the age demographics to sign up for leading parts of the Shabbat service or meeting for kiddush lunch or Shabbat dinner
52	SOEN	Social engagement	Create car sharing service	Help elderly or other congregants who have difficulty getting to CNS for services or classes

53	SOEN	Social engagement	Simcha Torah reading	Expand Torah readers to young adults and adults to honor a simcha.
54	SOEN	Social engagement	Recording life stories	Have elderly congregants share their life stories with the Aliyah program
55	SOEN	Virtual CNS	Expand Zoom links for Committees	Expand and provide Zoom links for all Committee Chairs to run meetings for in-person and remotely.
56	SOEN	Virtual CNS	Zoom training	Train more individuals to help with the Zoom services technology
57	SOEN	Virtual CNS	Links for seniors to gather	Create links to off-site senior communities so they can gather together remotely.
58	SOEN	Virtual CNS	Train congregants in tech	Provide training for those who are technologically challenged to give them access to online programs/services/classes/meetings.
SPIRITUAL & EDUCATION SUBCOMMITTEE RECOMMENDATIONS				
59	SPE	Education programs	New programming ideas; foster connection in new areas	Foster connection between parents based on personal interests. This could be done at drop-off times. Activities such as: <ul style="list-style-type: none"> - Yoga - Hiking - Coffee - Learning/Discussion - board games
60	SPE	Education	Hire a Youth Director	Hire a youth director to ensure strong youth programming and integration of Jewish learning and social activities and to provide staffing support for Rabbi Posen to recreate “cool” USY culture at CNS.
61	SPE	Relational	Create connection time during services	Create opportunities for people to connect and give recognition during and after services. <ul style="list-style-type: none"> - Small group discussions during D’var Torah - Oneg time after services - Use staff and volunteers to help connect people before services
62	SPE	Relational	Create informal social connection time online	Use Zoom platform to create a social platform for members to connect informally. Help connect people with shared interests. Help promote other synagogue programs.
63	SPE	Ritual lay	Support continuing	Provide regular training opportunities for ritual

		leadership	development of ritual lay leaders	lay leaders (Torah readers, gabbais, etc.). Create connections with experienced leaders. Recognize those who volunteer. Be proactive in recruiting lay leaders. Make lay leadership more fun and meaningful. Connect experienced leaders with new ones to make sure that the experience of engaging volunteers for positions of honor is done with genuine care and proactively.
64	SPE / GEN	Feedback	Feedback mechanisms	Explore new ways to empower congregant to deliver feedback in a trackable and actionable manner as CNS looks to adopt its new VMV
65	SPE	Programming	Transition programs	Develop programs and ritual activities that support and honor transitions between different phases of our education programs from early childhood to mature adulthood
66	SPE	Programming	Connecting community hubs	Foster connecting between existing community hubs such as Tot Shabbat and Downstairs minyan to connect with the broader synagogue (e.g., Neillah)
67	SPE	Technology	Engaging communities with technology	Continue to utilize platforms such as Zoom to foster engagement that streaming and other technologies cannot provide. Provide technical support and look into new and innovative ways to engage those who cannot come to CNS (e.g., retirement communities)
68	SPE	Technology	Technology training	Match congregants who have tech skills with congregants who need help to participate virtually in Neveh Shalom
69	SPE	Community	Welcoming our next generation of leaders	Create a culture that welcomes children in all spaces (e.g., having children sing Adon Olam in main service with community after Tot Shabbat)
70	SPE	Ritual Committee	Forums of engagement	Explore more effective ways to create connectivity between the clergy and the Ritual Committee to best serve the congregations needs
71	SPE	Education	Create educational opportunities	Create informal education opportunities that integrate Jewish learning and social activities and promote connection among participants.
GENERAL				

72	GEN	Membership	Adopt additional metrics for measuring success	Adopt additional measurements to judge success of the synagogue beyond membership levels, finances, and profitability (e.g., net-zero carbon emissions)
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D. Detailed Summary of Subcommittee Findings

Preview to BUS & SOEN Subcommittees

The Business of the Synagogue Task Force and the Social & Engagement Task Force have both been meeting on a regular basis for the last year. After getting organized and delineating the respective visions for the work of both Task Forces, it became clear to all of us that the first step in the process was to develop an updated Mission, Vision and Values for CNS. That work was completed when the CNS Board approved the final version of our work in January 2021. The Mission, Vision and Values have guided all of the work of the two Task Forces. In particular, the Values – Community, Adaptation, Jewish Life, Inclusivity and Transformative Learning – informed all of our ultimate findings.

After the Mission, Vision and Values statement was approved by the CNS Board, both Task Forces returned to the task of preparing recommendations for the Long Range Plan. Both Task Forces conducted multiple interviews and met on a regular basis to determine the most important steps the Task Forces believed would bring the new statement to life and imbue it with lasting meaning and import for both CNS and the broader community. Both Task Forces undertook to define the Strengths, Weaknesses, Opportunities and Threats facing CNS. There were a great many similarities in the SWOT analysis performed by each Task Force, and one overriding theme evolved from that work product—our Synagogue is much more diverse than first meets the eye, and people of diverse backgrounds and interests choose to belong to the Synagogue for many and varied reasons and desire different outcomes from their memberships, but at the end of the day, made even more clear by the isolation imposed by Covid, all share a desire for **deeper connection and meaning**.

Diversity of and among our fellow congregants is a true strength that, when properly leveraged, can produce highly impactful and meaningful transformative Jewish learning (one of our Values). Covid laid bare that in one form or another, we all share a need for connection. When a member feels a connection to other members and to the clergy, staff and Board of the Synagogue, a type of “Jewish glue” that binds all of us emerges. When the Synagogue offers meaningful and authentic Jewish experiences in furtherance of those connections, that “Jewish glue” sets and becomes a defining characteristic of CNS, one that benefits all who come in contact with the Synagogue and that ensures the long term survival of CNS regardless of what transpires in the broader community.

Based on the two Task Forces’ shared conclusion that relationships and experiences are the key to the success of CNS, **both Task Forces recommend strongly that the clergy, staff and Board of the Synagogue reprioritize all activities, programs and expenditures of time to ensure that each and every member of CNS has deep and meaningful connections both to other members (including members outside of their extended families) and has the opportunity to deepen their Judaism through authentic and meaningful Jewish experiences**. Prioritizing relationships and experiences will, by definition, result in some current priorities receiving less attention. For

the Task Forces, this is a trade-off worth accepting because of the benefits that come from stronger connection and more focus on Jewish experiences. We believe the transformation of CNS from a place one comes to transact to a place one comes for opportunity and meaning will ensure the long-term thriving of CNS.

In 2014, Dr. Ron Wolfson was the scholar-in-residence at CNS. He spoke to the congregation about his book *Relational Judaism* and gave concrete tips for how to learn from megachurches, Chabad and Hillel and how to transform the Synagogue from a transactional model into a relational model. Dr. Wolfson noted how successful Chabad and the megachurches have been in breaking down large congregations/populations into manageable small groups that form tight relationships with each other and with the sponsoring organization. The two Task Forces are in unanimous agreement that the clergy, staff and Board must commit to the principles espoused by Dr. Wolfson. **CNS must transform so that every congregant feels known, heard and embraced, and so systems are put in place to ensure connection of each of us to one another and to the Synagogue, and to ensure consistent follow up by clergy, staff and lay leaders with congregants experiencing illness and loss.** The transformative value of making relationships and truly getting to know congregants, in essence becoming a family, cannot be understated. **We believe a pivot to a relationship priority will empower CNS through the expected challenges to Conservative Judaism over the next decade and create the kind of *Kehilla* with which both current and future members will want to affiliate.**

Subsequent to Dr. Wolfson's visit to CNS, Dr. Wolfson partnered with two rabbis whose jobs are congregational outreach and inclusion. The *Relational Judaism Handbook* written by Dr. Wolfson, Rabbi Nicole Auerbach and Rabbi Lydia Medwin provides a road map and tools to employ in establishing small groups to deepen relationships. Some of the steps outlined in the *Handbook* are very similar to techniques employed by both Chabad and the megachurches, to break down larger congregations into small groups to ensure the development and deepening of relationships and to ensure opportunities for meaningful Jewish experiences.

Additionally, Rabbi Mike Uram published his book, *Next Generation Judaism*, that described the transformation of the University of Pennsylvania Hillel from an organization that served only those who crossed its threshold, to an organization that created meaningful Jewish experiences for both those highly engaged students, whom he labeled Empowerment Jews, and those students who had no real interest in Hillel, whom he labeled Engagement Jews. Rabbi Uram suggested the transformative principles could apply not only to Hillel but to all Jewish institutions including synagogues. We agree.

Applying the principles espoused in these books will require CNS to prioritize (1) relationship development in smaller group settings for all congregants with each other and with the clergy, staff and Board, (2) offering our Empowerment Jews, those who participate regularly in most or all of what the Synagogue currently offers, the platform and guidance to innovate and create more meaningful Jewish experiences and deepen their faith, (3) offering our Engagement Jews, those who rarely participate in what the Synagogue offers and those who perhaps are not even members, the opportunity outside of the CNS building to participate in meaningful Jewish experiences and to get to know each other and our clergy, staff and Board in a non-institutional manner aimed only at bringing the beauty of Jewish experience to all with whom our clergy, staff and Board interact, and (4) celebrating and honoring the diversity of our members and of the wider community. These priorities will ensure that CNS brings to life and fully realizes the five Values described in the Mission, Vision and Values statement:

- **Community – Creating new relationships and imbuing existing relationships with new**

meaning as we share meaningful moments and experiences

- **Adaptation – Encouraging innovation and empowering our people as they build on the Jewish experiences they have with our clergy and staff to deepen their connection to Judaism**
- **Jewish Life – Fostering an atmosphere in which no one in our congregational family goes through life alone, where all feel loved and supported, and where we collectively enrich each other's Jewish lives**
- **Inclusivity – Celebrating our diversity, using the diversity to deepen understanding and ensuring we embrace and honor each other and see the divine spark in each of us**
- **Transformative Learning – Creating the opportunities for all of our members and others in the community to deepen their connections and to learn through doing what Judaism has to teach all of us**

We believe these priorities will also ensure CNS achieves its Mission - building an inclusive, authentic and engaging experience of Conservative Judaism and ensuring lifelong connection; and fully realizes its Vision – building a more humane world by cultivating Jewish living. There may be alternative paths to achieve the Mission and fully realize the Vision, but we believe the pathway outlined above has the highest likelihood of both achieving success and ensuring the long-term continued vitality of CNS. We also believe the pathway outlined above will be transformative for CNS and position the Synagogue to grow as Jewish Millennials catch on to the benefits of the relational aspect that becomes the hallmark of CNS over the next several years.

We know that Millennials are less likely than their parents and grandparents to want affiliations, preferring instead to go from one opportunity to another in the same way their music playlists might go from one artist or genre to another. However, the recently released 2021 update to the Pew Study on American Jews underscores that Jewish Millennials want meaningful connections to Judaism and to Jewish experiences and crave connection to others. We believe our new Values statement resonates with the values described in the Pew Study as being held by Jewish Millennials. We further believe that CNS has an excellent opportunity to utilize the principles outlined above and in the referenced books to maintain a connection with young people in the community by meeting those young people where they are and without ulterior motive. Those connections serve to keep the “Jewish flame” alive and to introduce the younger people to meaningful Jewish experiences that whet their appetites for knowing more about their origins and their People, and perhaps ultimately about their Religion. Membership in the Synagogue for this age cadre is irrelevant, in our opinions, and should not stand as a prerequisite for our clergy and staff providing the Jewish experiences outside of our building. As the Millennials with whom CNS connect start families, they will hopefully have a deeper connection to our clergy and staff so they will be open to raising their children in a Jewish home and providing their children with a Jewish education.

The Business of the Synagogue Task Force knows the Synagogue needs to develop a stronger ethos of philanthropy and a true endowment to fund the operations of CNS into the future. The Task Force believes the adoption of the priorities described above will result in gaining the trust of congregants and making them understand and respond to the needs of CNS for greater funding. **Happy congregants who feel loved, supported, known, heard and connected will respond to the needs of CNS a lot more readily than those who give out of a sense of obligation without the accompanying passion.**

Both Task Forces believe staff must put in place accountability systems to ensure proper follow up, including making sure the clergy meets with new members, members experiencing illness, members experiencing *simchat* and ultimately with all members. In addition, the two Task Forces recommend that **a new clergy/staff position be created akin to a Director of Congregational Engagement and Outreach to help create small groups, to help with seeking, training and thanking volunteers, to help with connecting new members to the *Kehilla* and to serve as a trainer to the rest of clergy and staff for how to create a truly transformative relational *Kehilla*.** The *Relational Judaism Handbook* and *Next Generation Judaism* provide a road map and tools for the new Director of Congregational Engagement and Outreach to employ in establishing small groups to deepen relationships. The historic CNS *Havurot* model could also serve as a means of doing some of this work. The model employed by Gesher is also instructive, and there are more innovative approaches akin to a concierge model to introduce and connect newcomers to the institution and its members. There are other successful examples in other synagogues and megachurches, and clergy, staff and the Board will have to wrestle with what works best for CNS.

We recognize that a new staff position is a cost burden, and know the Board will need to wrestle with competing funding demands to fund the new position. **Until the funding is available, we recommend that the jobs of the clergy and staff be reprioritized to make room in their jobs to make the priorities outlined above key parts of their job responsibilities.** We further recommend that the Board ensure that all reasonable barriers to the prioritization of the principles enumerated above be removed from the jobs of the clergy and staff so they have the time to focus on the above priorities.

Recently, Rabbi Kosak invited Pastor Seth Brooks of C3 Church in North Portland to address our congregation after Shabbat services. Pastor Brooks, a white person originally from Australia, explained that he learned early on in his tenure at C3 Church that anything he thought he knew or understood about the experience of Black members of his church was incorrect. He explained that after some initial missteps, he decided to go on a listening tour and meet with his parishioners one by one. Most meetings last an hour or less, but he changes his schedule if necessary to continue a meeting if the parishioner simply needs more time or is lonely. Pastor Brooks noted that his tour will take him quite a while to complete, but the results are much stronger and deeper connections and understandings between him and his congregation. Although we are not suggesting that Rabbi Kosak disengage from all of his other activities to follow the model employed by Pastor Brooks, we are suggesting that the model is highly relevant even for a Synagogue of close to 1,600 adults. **We want our clergy and staff to know us and we need our clergy and staff to ensure we realize the maximum we desire to realize in our respective Jewish journeys.**

To that end, **both Task Forces endorse the concept of empathy interviews.** Karen Twain introduced all of us to the concept of these short, 15-20 minute, interviews[4]. One of her colleagues then worked with several LRP committee members to conduct empathy interviews of current and former congregants and of clergy and staff. The results of the empathy interviews played a meaningful role in the conclusions both Task Forces came to as set forth above. **The Task Forces believe the empathy interview model should be continued and should be utilized to help the clergy, staff and Board identify member needs and concerns that require addressing. We recommend that the clergy be trained as interviewers so they too can do some of the interviews and use those as a springboard to deepen connections and for achieving the types of outcomes Pastor Brooks attained through his interviews with his parishioners.**

The transition to the new Shul Cloud system will help the Synagogue do a better job of knowing our congregants better and tracking interests, family situations, illnesses and loss. The two Task Forces recommend that clergy, staff and the Board focus on devising systems to track and ensure follow-up with new members, members experiencing illness or loss, members experiencing *simchat*, shut-in members and seniors. **Clergy and staff should have a system of accountability, monitored by the Board, to ensure that all members needing a touch receive one and that all members receive periodic outreach (not to ask for money, but to learn how each member is doing and to deepen connection).** This will only succeed, however, if everyone from the clergy, executive director and Board President down to the crew that works for Kurt understand and buy into the process and its vital priority to the future of the Synagogue. **Weekly clergy/senior staff meetings should include some element of ensuring consistency and follow-up on all members in need or who haven't had an outreach in a while.**

One final comment in this introduction. Programs, *tikkun olam* and adult education are extremely valuable components of the CNS experience. **We recommend that whenever possible, a social time be incorporated into the program or class so people get to know each other and the clergy or staff doing the program or class.** Even for services, when in-person attendance picks up and food/beverage is again served, imagine the power of taking a break mid-service occasionally for a coffee and schmooze time. We will leave it to the Religious and Education Task Force to address services, but we make the point only to suggest social engagement between members and with clergy and staff needs to be incorporated to the fullest extent feasible into all activities of CNS.

What follows below are the specific recommendations of both Task Forces and a list of the members of each Task Force. The Business of the Synagogue Task Force also produced a separate report recommending an approach to Executive Director succession when the time comes for Fred Rothstein to retire. We express our deep appreciation to the clergy, staff and Board members who gave so freely of their time. We also express great appreciation to Stephanie Arnheim, Nathan Von Colditz and Leah Conley for their leadership of the entire Long Range Plan process.

<p>Business of the Synagogue Task Force:</p> <p>Alan Blank, chair</p> <p>Holly Eby</p> <p>Jennifer Kalenscher (starting March 2021)</p> <p>Alex Menashe</p> <p>Gary Peck</p> <p>Debbie Plawner (until March 2021)</p> <p>Danit Rothstein</p> <p>Stephanie Arnheim, LRP Support</p>	<p>Social and Engagement Task Force:</p> <p>Marissa Richardson, chair</p> <p>Alan Blank, chair (starting April 2021)</p> <p>Jennifer Kalenscher</p> <p>Alex Menashe</p> <p>Danit Rothstein (starting April 2021)</p> <p>Josh Wnuk (until December 2020)</p> <p>Nathan von Colditz, LRP Support</p>
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[1] This has been true for all of Jewish existence! Genesis 2:19: “It is not good for man to be alone....” The word “synagogue” comes from the Greek for gathering together, and one name for a synagogue is *Beit HaKneset*, house of gathering. As many Rabbis are wont to quote, “they came for the *Kaddish*, but stayed for the *Kiddush*.”

[2] Dr. Wolfson learned a lot from his friendship with Pastor Rick Warren of Saddleback Church, one of the most successful megachurches. Here is how Saddleback describes its small group approach: “God made us to be in community with people. We need each other, because we can do more, be more, and endure more when we’re walking through life together. Small groups at Saddleback Church are places to build authentic relationships with people who will support you and love you, no matter what.” This message resonates incredibly well not just with “churched” people but also with “unchurched” people who are attracted to the notion of building authentic relationships and experiencing unconditional acceptance and love.

[3] One interesting finding in the 2021 Pew Study update is that, for those who consider themselves Jewish in the 19-26 age cadre, most either associate with Orthodox Judaism or “None” and very few associate with either Reform or Conservative. This should be very sobering to CNS, Beth Israel and other non-Orthodox synagogues in our region. Both Task Forces agree that membership for this age cadre should be de-emphasized in favor of a concerted engagement strategy, comparable to outreach programs like Ikar in Los Angeles, Romemu in New York, Sixth and I in Washington DC, Mishkan in Chicago, the Kitchen in San Francisco, etc.

[4] The interviewer asks a limited number of open-ended questions and does a lot of empathetic listening. A scribe accompanies the interviewer to take notes, and the interviewee is guaranteed anonymity if s/he so chooses.

Business of the Synagogue (BUS)

A. Financial Resources:

1. Issue is that current annual giving and endowment levels are far below best practices level; many congregants perceive the Synagogue nickels and dimes them, and yet our annual giving falls more than 50% short of the levels required to fund the Synagogue in accord with best practices (without the “nickeling and diming”) and the Synagogue endowment produces less than a third of the 25% of budget best practices goal for each year; the Synagogue currently relies too heavily on dues, tuition and fees to meet its budget due to lack of required annual giving and endowment dollars

2. Proposed Solutions:

- i. **Financial Transparency** - Better education of our Kehillah about the actual costs and need for greater annual giving, not just how much is needed but why and what the long-term benefit can be; in effect, define the value proposition with greater clarity,

comparably to how universities/museums etc leverage value to higher donations; do periodic reporting on finances in the Chronicle (including thanking donors) and do an annual report each June or July that demystifies CNS' finances and helps educate the Kehillah on how funds are expended and what needs remain unmet due to lack of sufficient fundraising

ii. Explore cost-cutting and cost-sharing (ie., with Temple or others in community) to keep expenses as low as feasible without sacrificing the delivery of services to and personal touch with our Kehillah

iii. Explore revenue generating activities like concerts, winery partnerships, etc that could attract revenues from third parties unaffiliated with the Synagogue

iv. Establish technology task force to evaluate Shul Cloud capabilities and ultimately decide if CNS needs a better donor management system to permit clergy/staff sharing of information on members (with appropriate safeguards on sharing of sensitive information), better management reporting for executive team and Board of Directors

v. Design attractive incentives for annual fund giving levels of \$5,000 and higher to attract more high dollar donor families; consider a \$10k or higher level where no further donations/fees are required each year, dinners/fundraiser dinner are free, so no more "nickel and diming"

vi. As raise more annual giving consider elimination of pesky fees like adult ed costs for clergy-led programs to reduce "nickel and diming" feel

vii. Leverage recent efforts and materials of Grinspoon/Foundation Life and Legacy endowment program to dramatically expand number of congregants providing for the Synagogue in their wills/trusts/pledges of life insurance; Consider campaign to raise current funds to create a meaningful current endowment; goal should be to create an endowment equal to 4x the Synagogue's annual budget (ie., \$12 million or so in current dollars) so endowment income supports 25% of the budget each year (current endowment, excluding cemetery funds, is approx. \$1M)

viii. Better use of social media to ensure Synagogue reaches the unaffiliated younger Jews in Synagogue catchment area; ensure Synagogue remains a beacon to all Jews relocating to Synagogue catchment area

B. Aging Congregation; Few Members in 20's and 30's

1. Issue is that the Synagogue is not retaining children who grow up at CNS and is not attracting enough new members in their 20's and 30's

2. Solutions:

i. **Pre-membership engagement:** Concerted effort by clergy/staff to deepen relationship with kids who grew up at CNS, via outreach social events during High School and College and via social and professional development

opportunities post-graduate; define success to include affiliation by those kids either with CNS or with other synagogues, as goal is keeping the “Jewish flame” alive and feeding that flame through High School, College and into their 30’s

ii. Remove barriers to participation, explore targeted grants/fundraising to make the events targeted at 20’s/30’s free or as close to free as feasible

iii. Create attractive programming/meaningful experiences so young Jewish adults want to connect with CNS; work with other 20’s/30’s to serve as hosts to help remove any “intimidation factor”

iv. Greatly expand CNS social media presence (“meet them where they are”)

v. Offer B’nai Mitzvah kids a “free membership” of their own from age 13 to age 26, independent of whether their parents remain at CNS

vi. Continue support of Tichon focus on youth fundraising comparable to what Oregon Jewish Community Foundation does with youth to both teach and increasingly involve our youth in funding decisions; improve communications to parents about the activities and the benefits to the youth of participating in these activities

vii. Revitalize USY and provide staffing/volunteer support to Rabbi Posen to develop a “cool” USY cadre

viii. Prioritize continuous outreach to CNS kids in college, involvement of broad team including all clergy, appropriate staff, Board members, volunteers, parents

ix. Greater outreach to Portland, other Oregon Hillels and to unaffiliated young adults in Portland with Shabbat meals, experiences throughout the year, not just for High Holidays

x. Study and implement a fully voluntary dues program for young adults below age of 35, perhaps even 40; the current amount of membership dues from this age cadre is de minimis and the payback of proving the Synagogue’s outreach is of pure motive to engage and bring CNS Judaism to young adults and not see the young adults as funders will pay huge dividends in the future

C. Staffing

1. Issue is staff and clergy appear to be greatly overworked, and yet engagement level and relationship building within the Synagogue community appears sub-optimal and staff morale is challenged, especially during Covid

2. Proposed solution:

i. Retain an organizational consultant to assist the clergy, executive director and Executive Committee to evaluate how each clergy/staff member spends

his/her time and to recommend ways to eliminate duplication/unproductive time, increase accountability structures, efficiency and staff morale, including reorganization of staff assignments

ii. Reorganize staff assignments per recommendations to ensure optimization of talents, enhanced productivity, increased staff morale

iii. Evaluate better technology/ systems to alleviate workloads, increase productivity

iv. Goal should be for the clergy and staff to truly know our congregants, work to deepen relationships with and among congregants and become a truly relational synagogue

v. Leverage some of the existing hours set aside by clergy, school leaders, senior staff for meet-ups to permit unstructured social interactions with members (no agenda other than getting to know each other)

vi. Encourage clergy, senior staff to attend morning minyanim from time to time to engage with and get to know “minyan-aires “

vii. Explore additional resources to work with the communications team to ensure their ability to create crisp, coordinated and targeted communications, high quality marketing of Synagogue and schools, greatly increased social media presence

viii. Work with clergy to explore hiring of “engagement” rabbi or professional to help with instilling relational Judaism into Synagogue culture and to bring more programming expertise to the Synagogue (see Temple Emanuel Denver job description for this role); if successful in hiring this person, use him/her to handle programming responsibilities currently done by Membership staff (will need to raise funds to cover the costs of this new position, but believe that is worthwhile given the measurable impact this role can have on the Synagogue), and use freed up time of Membership staff to deepen relationships and provide “white glove” concierge-type service to new members and more outreach to unaffiliated in the community

ix. Consider reinstitution of Chaverot or other common interest groups to increase relational engagement across all ages, professions, languages spoken, etc.

D. Building

1. The issue is twofold, one that the sanctuary and school areas of the building and the parking lot are not “selling points” for the Synagogue and two, that the patterns of building usage post-pandemic may vary greatly if many people continue to access the Synagogue remotely once the pandemic is over

2. The solution:

- i. Retain an interior design professional to give input on how the building can be redesigned to create a harmonized space with the same attractiveness as the Stampfer Chapel to become a better selling point
- ii. Ensure that some of the building fund money is expended to improve wifi and technology so the Synagogue works well for both in-person and remote engagement
- iii. Consider a community-wide project to adorn the Synagogue similar to the stained glass project undertaken in the movie Holy Frit (involves the whole Kehillah in beautifying the building and builds greater pride in the Synagogue)

3. A final note of concern. Building usage post-pandemic will no doubt be impacted by the increase in availability of remote access from home. It is possible that the decline in in-person attendance at CNS events/services could be very material. If young families choose not to affiliate in numbers sufficient to make a material reduction in Synagogue membership, the increasing maintenance cost of a 60-year-old building could become a really difficult budgetary weight on CNS' ability to meet the needs of the Kehillah. In such event, which we certainly hope will not occur, we encourage the Board to be proactive in exploring either tenants to offset some of the cost or even, if the budgetary impacts of decline in membership coupled with increasing maintenance costs for the building become severe enough, sale of the CNS property and relocation to a smaller, more modern facility.

E. Synagogue as Source of Continuous Innovation/Improvement of Jewish Life for Entire Kehillah

1. The issue is how to build on the legacy of Rabbi Stampfer (z"l) and bring the Synagogue's value of innovation to life

2. The solution:

- i. Encourage bottom-up innovation, make it easy to do so, and easy to determine how to offer up ideas (create culture that actively encourages/rewards congregant-led initiatives)
- ii. Consider twice per year congregational "think tank" to generate ideas on how to improve CNS, Portland Jewish experience
- iii. To ensure continuity, suggest first half hour to 45 minutes of each "think tank" or "ideafest" be allocated to youth, young adult experiences
- iv. Institute a system of accountability to acknowledge/reward good innovative ideas, ensure proper follow-up and appreciation
- v. Within existing Board of Directors committee structures, create process to encourage and personally invite participation by members less likely to raise

their hands

vi. Set aside budget (ie., \$25k/yr growing as funds become more available) to seed fund innovation, including to bonus staff who suggest successful innovation

vii. Goal is to create a culture that expects/rewards/encourages innovation, continuous improvement of the Synagogue and the Portland Jewish experience; we recommend the Board develop measurement standards to track the impact of innovation expenditures

viii. Goal is also to ensure the innovation does not unduly burden clergy, staff or interfere with Board priorities, so need to ensure close partnership between lay leaders and clergy/staff to balance competing priorities, ensure proper allocation of resources as build toward culture of continuous improvement and innovation

F. A Note on Implementation of the Recommendations in the LRP. The members of the Business of the Synagogue and Social and Engagement Task Forces believe that successful implementation requires the full buy-in and ownership by the Board, the clergy and the staff. Having noted that as an essential component of success, we also recommend that the Board reconvene the LRP committee, or a subset of the LRP committee, periodically, perhaps annually, to review the status of implementation and to offer constructive suggestions on how to ensure success of the LRP.

Social and Engagement (SOEN)

A. Membership Welcoming

1. The issue is that the Synagogue's current new member welcoming process, previously referred to as an onboarding process does not do enough to connect all new members to the Kehillah and the clergy in accordance with best "Relational Judaism" practices

2. Solutions:

- Review current process for incoming members/What do we currently do? How can we make the process more relational?
- What do we currently send? Email/Facebook/Phone Call/Welcoming gift or basket/New member resource package
- Look to see if current process is effective in establishing long term relationship
- What is the average tenure of years/months when people leave
- Find average membership tenure for 20's/30's/40's etc.
- Use listed info and pair with conversations with members who have left
- Find/develop/refine standard process membership follows to take new member on "tour" of synagogue.....intent is a personalized experience that creates informed and invested new members who are introduced into supporting relationships with established members who will strengthen retention ability
- Provide opportunities for continued interaction at CNS in a social setting to continue to grow the new relationships described above, the goal is for the relationship to grow AT the synagogue, deepens ties through location relationship

- Put in place process for Board, clergy to meet with new members in one-on-one meetings to begin deepening relationship, connect new members to parts of CNS that resonate with their expressed interests; all meetings should occur ideally in first 60-90 days of new member joining; meeting should be reported to membership committee, who can track new member engagement and follow-up of Board, clergy and staff
- Consider a “*Brit*” ceremony (similar to what Rabbi Ed Feinstein employs with new members at Valley Beth Shalom) or other means of beginning the process of new members understanding the whole concept of “*Kehillah Kedoshah*” (holy community)
- Provide opportunities for cross-generational relationships with new members; pilot a mentorship program comparable to *Mensches* and *Mavens* to determine if establishing mentorship proves beneficial to new members.

B. Outreach to Prospective Members, Particularly Younger Prospective Members

1. The issue is that the current CNS outreach to younger unaffiliated Jews in Portland does not feel relational and does not employ social media effectively
2. Solutions:
 - Revise membership recruiting content to be more relational, to convey value of deeper relationships and engagement along with the breadth of offerings at CNS
 - Create opportunities for better networking and engagement with college students in the area through Hillel and other young adults in community who might not see value in membership
 - Develop a marketing plan with appropriate opportunities for “off-campus” relationship building with CNS clergy, staff and Board
 - Create a cogent statement of the value proposition of membership to younger adults and a clean and simple “Road map to membership”
 - Identify where potential new members are and try to estimate potential annual quantity
 - Federation
 - Hillel/College
 - Non-profit/local social groups
 - Moishe House
 - Identify and contact key relationships to build for long term partnership
 - Complete social media evaluation and rebuild to modernize/optimize
 - Facebook
 - Instagram
 - Twitter
 - Website

- Better utilize social media to inform and introduce non-affiliated Jews to NS
- Create an easy to use checklist so all social media “talks” to each other when there is a post/update
- Identify fun/meaningful social events to provide the congregation with the opportunity to bring potential new members to
- Relaxed non-pressure environment to build new relationships/friendships

C. Social Engagement of All Members

1. The issue is how to cultivate relationships among members and create meaningful small groups within the Synagogue and how to show “value added” to all members desiring greater connection

2. Solutions:

- Provide more networking opportunities between generations (mentorships)
- Provide more networking opportunities for members who have similar career interests/experience
- Tribe
- Identify where meaningful relationships are built now and historically
- As stated above, find meaningful/social events where there is opportunity to create new relationships
 - o “Kosher” Wine Club with a special food pairing
 - o Job fair/career day for local/regional graduates
 - o Sport event/concert/theater group or club
 - o Concert/Dance/Prom/Gala dance or social at NS
 - o Heritage food cooking class or group
 - o Language groups within NS -> Russian/Yiddish/Hebrew/Ladino
 - o Most importantly, listen to what your current congregants are asking for
- Focus on being not just a center of religion but also heritage and history
- Create a shabbat cycle that highlights all the age demographics with active focus to get sign-ups for reading the prayer for peace or other prayer by that group (i.e., the Russian community should have a monthly/quarterly Shabbat service, same for young adults with either a focused kiddush lunch or after shabbat dinner)
- Create an on-boarding support group that brings specific demographics together for committee support, shabbat services, (relates to I above)
- Create a geographic car-sharing for services/education classes
- Create a grandparents/parents of B’nai Mitzvah families group to learn/lead a portion of the service.
- Baby naming/Bris support group for interfaith or conversion families
- Expand Mavens/Mensches to Members:
 - B’nai Mitzvah for adults to learn with current class
 - Adults reading Torah for individuals with a simcha (in honor of a birthday of a congregant)
 - Kids reading Torah for individuals with a simcha
 - Recruit adults through educational programs for seniors giving them a voice for their life

- stories that can be shared with the Congregation through the Aliyah program
- Talent show including young adults and older adults

D. Increasing Participation in Committee and Volunteer Roles for Members

1. The issue is that committee member recruitment is difficult and it is difficult for less engaged members to even discover volunteer opportunities or join a committee

2. Solution:

The Committee Structure and review process in place today does not have a specific way to showcase their activities, review the direction they are going and get input from the Board and from the Congregation as a whole. This year the CNS Board has been formalizing the Committee Mission statements and getting approval from the Board for these. Future direction of the Committees needs to be more transparent and interactive with the Kehillah and with the Board.

- Committees Create clear Mission Statement (tie back to Values) *This is on-going through the current Board, not including the tie-back to the Values*
- Members/Leaders of the Committees
- Committee Chairs with a direct tie to the CNS Board
 - At least 3 members of the Congregation at large
 - Committee Chairs/Committee membership? Should there be a limit??
 - Committee review at the Board meeting on a yearly basis
- Committee fair on a yearly basis open to entire congregation
- Volunteer coordinator/on-boarding feed new members to committees

E. Library

1. **Issue:** The issue is CNS has a wonderful asset in its Library and the resources available to members, but the asset is not widely understood or used

2. **Solution:**

We have a fabulous Library. We should be able to showcase the books we have. We should be able to support growth in either the kids library or the adult library. The Aliyah/clergy/other support groups should have a symbiotic relationship with the library to get congregants access to the texts, use the texts, and showcase the texts that we currently have.

- Showcase the Library through articles
- Highlight Holiday books->Highlight cook books
- Highlight fiction/research books
- Consider opening Library at end of Shabbat services for people who want to hang out in the Library, perhaps even consider coffee/tea service at higher traffic times; if need a staff person to handle check-out of books or other materials on Shabbat,

- consider hiring a non-Jewish part-time person to perform the check-out process (if permitted halachically)
- Create a book group in cooperation with Sisterhood/Men's Club/Aliyah/Parents of Aliyah/clergy and/or leadership: "Everybody Reads" - type of program

F. Leadership Training; "Leadership Lab"

1. Issue:

The issue is that CNS does not have a leadership training and development program and even Board members serve with uneven training

2. Solution:

This idea is to create a way for all of the Committees to work together to ensure the Synagogue is continuing to meet the needs of the Congregation and the needs of the Board and clergy. The Leadership Lab is a way for Committees to bring new leaders to the attention of current Board leadership by bringing in those who have new and interesting views. It would also be a way for the clergy to get help in running some programs. If they come into the Leadership Lab with an idea surrounding an upcoming holiday they can get buy-in and possible new ways of gaining volunteers and leadership support for their program.

- All Committee chairs meet every 6 months to review missions and issues they are working on
- Committee chairs help support the clergy/staff on the annual holiday schedule
- Committee chairs bring in next generation of leaders to provide path for continued growth
- All Committee and Board members should receive leadership training and development in an annual basis

G. Virtual CNS

1. Issue:

The issue is there is a lot of upside opportunity to engage members via Zoom and other virtual media, but members need training to take full advantage of offerings

2. Solution:

- Virtual/on-line support
- Expand/provide Zoom links for Committee Chairs to run meetings in-person and remotely.
- Provide moveable boards with the technology to show larger groups so in-person gatherings can see everyone on the screen and those off-site can view the group
- Create links to off-site senior communities so they can gather together remotely as a community
- Expand the direct link access to all of the chapels in the building.
- Train more individuals for running the zoom services

- Provide training for those who don't have a lot of technological knowledge to give them access to on-line programs/services/classes/meeting

Spiritual and Education (SPE) Subcommittee detail

Introduction to Recommendations

Today and in the foreseeable future, synagogue life draws people because of the value of community, linked together with a sense of shared purpose. With all of our diversity as a community, a common theme emerges. Our best CNS is a place where people find connection, friendship, a sense of belonging, being seen and heard as valued members of the community.

In our synagogue community, people share with others their deepest sorrows, greatest joys, and everything in between. Through our traditions, we can find a sense of purpose that goes beyond career or material gain. Our best synagogue ultimately must be true to our name: a **Congregation** with a focus on connection among its members; a **Neveh** (*oasis*) where people can turn for fulfillment in a world that is increasingly isolating and aggravating, and truly a place of **Shalom** where members of our community can find a sense of peace and wholeness.

In carrying out the recommendations as a whole, there is a consistent call for emphasizing proactive efforts, rather than reactive troubleshooting. We aim to be a community that works *together* continually to advance our values.

Ultimately, every recommendation from the Education and Spiritual Task Force is rooted in the values of being our best community – putting member experience first, to ensure every person has the opportunity to feel welcomed, included, valued and supported in the community.

Members of Education and Spiritual Task Force

Mark Sherman, Chair

Jaimie Harper

Dann Horowitz

Toby Shulruff

Karen Twain

Leah Conley, LRP Support

SPECIFIC RECOMMENDATIONS OF THE SPIRITUAL & EDUCATION TASK FORCE

A. In all areas of programming and services, place a priority on helping members (and other participants) experience a sense of belonging and connection.

Special emphasis shall be placed on engagement and empowerment of members in promoting connection. When members are sought out and asked to share thoughts and ideas, the community benefits from wider involvement, and the members are increasingly invested in the success of the innovations they help to create. The norm for CNS should be engagement and empowerment of members, working with staff, to develop the community. Methods may include:

1. Organize staff roles to prioritize fostering member engagement and interconnection. Considerations may include a director-level position that focuses primarily on outreach and engagement of members in development of existing and emerging programs.
2. Establish a regular rotation of “community think tanks” involving members (including Board leaders), staff, and clergy to address areas of CNS life where we can become a stronger community, more fully living out our Vision, Mission and Values. Topics may include: use of technology to connect with services and programs; creating more opportunities for meeting and connecting among a broader range of CNS members. Deliberately diversify participation in task forces; include multiple generations; people with different areas of community involvement; varied lived experiences. Be attentive to scheduling challenges for participants, especially families and youth.
3. Allocate funding and staff time to invest in new ideas emerging from community “think tanks.” A transparent process for investing funds in innovation is especially important.
4. Recognize and appreciate community members who exemplify the values of community and connection. Formal and informal recognition programs demonstrate the values of the community, motivate engagement and sustain those who have dedicated themselves to the betterment of CNS. Ensure recognition is inclusive of all generations and backgrounds; involve diverse members in nominating those who should be recognized.
5. Continue to use empathy interviews as an essential staple of CNS activities; use the interviews both to inform ongoing planning, and also to find ways to engage diverse members. Successful implementation of the LRP should produce documentation of increasing sense of belonging and connection in our community members.
6. Give people a place to turn and be empowered when the community is not advancing its core values. Establish clear and simple protocols for action when members feel we can do better and can bring attention to opportunities for improvement in inclusion and connection.

B. Education Programs and Services

1. At every level of synagogue programming – learning for children and adults, religious services and life cycle events – prioritize approaches that foster social connection and a sense of belonging. Examples for consideration include:
 - Create programming that engages parents in shared activities at drop-off times; create incentives to stay, instead of leaving the synagogue. Ideally, involve parents themselves in identifying and implementing shared activities. These activities are based on personal interests, and not necessarily traditional Jewish themes. The activities foster connection between parents in CNS programs.
 - Workout sessions (not necessarily Jewish theme)
 - Yoga
 - Hiking/running
 - Coffee
 - Learning/discussion
 - board games
 - Develop programs and ritual activities that support and honor transitions between different phases of our education programs from early childhood to mature adulthood. This may be a priority area for a “think tank” task force, per recommendation A-2.
 - During religious services, create opportunities for people to connect with each other. Possibilities include:
 - Small group discussions during d’var torah.
 - Oneg time after services; train and empower members to use this time to connect with others; help make connections with other members with shared interests.
 - Prior to services use staff or volunteer “matchmakers” to arrange for people to meet each other at shabbat services, sit together, chat before/after services.
 - Support existing community hubs like Tot Shabbat and Downstairs Minyan to continue doing what they do well to foster connection AND also find ways to help people in these different community hubs to connect with those in the larger community.
 - Use d’var torah period in services to recognize and listen to leaders in diverse areas of synagogue life: youth leaders, young families, older adults (mensches & mavens).

C. Technology

Build on Lessons Learned from Pandemic Period: Retain options for on-line, remote participation in addition to on-site, in-person involvement.

- For remote participation, prioritize community and connection by utilizing participatory platforms such as Zoom. While streaming may continue to be an option for those who prefer it, a community dedicated to building connections will tend to favor modes in which participants can see each other and communicate.
- For widest inclusion, provide tech support for those who need it; consider training and empowering people with tech skills to help others. Tech support may be a particularly good role for youth/young adults.
- Ensure tools (both hardware and software) are sufficient to provide a satisfying experience for remote participants in services.
- Explore options for asynchronous participation in synagogue programs.
- Create informal social connection on Zoom (or similar platform), not structured around a particular program, but more focused on connecting people with shared interests. These social forums will also help build comfort with the technology in making connections with other synagogue programs.
- Pay attention to special needs of those who are most likely to favor remote participation:
 - Older congregants
 - People who are ill or have mobility issues
 - Congregants who have moved away
 - Family members of congregants

Strengthen roles of ritual lay leadership in services

Participation of lay leaders in services is a sign of a healthy, engaged community. It is especially important that the community sees the clergy as recognizing and supporting ritual lay leadership. The more participatory, the closer we are to our synagogue vision.

- Increase staff investment that supports continuing development of ritual lay leaders: torah readers, gabbais, etc.
 - Regular training opportunities
 - Make lay leadership fun and meaningful.
 - Connect experienced leaders with new ones
 - Recognize and celebrate those who volunteer
 - Reduce silo effects between Downstairs Minyan and main service volunteers – one kehilla, with diverse options.
- Strengthen outreach to potential participants – invite and engage. Dedicate a staff role to this activity. Involving lay leaders is more than “filling slots.” Create a culture of engagement, encouragement and appreciation. Being proactive rather than reactive in recruiting lay leaders means putting a personal touch on the invitation and encouragement to be involved.

- In religious services, promote a culture of lay involvement and lay leader involvement. Prioritize clergy roles that facilitate and empower community connection in creating the service. When the service is happening from the congregation – not just from the bima – we are closer to our synagogue vision.
- Create a culture that welcomes children; create a balance of respect for different generations participating in services together.
- Utilize Ritual Committee as an effective forum for clergy and Board leaders together to listen to active participants in services.
- Allow for diversity of experience at synagogue – support and empower different forms of connection to the service (i.e. alternative use of music, study, social justice, meditation, noshing and schmoozing).

Invest in the creativity and responsiveness of our Education Programs. Learn from those successes to inform other areas of synagogue life. Acknowledge that vibrant youth and family programs are key to the future of our community, provided we retain involvement as children and youth transition to adulthood.

- Involve youth, young adults, parents of children in think tanks. Reach out and engage.
- Involve Education Program leaders in strong roles in think tanks and other creative responses to priorities.
- Promote informal education – integrate Jewish learning and social activities that promote connection among participants.
- Hire a youth director position to ensure staffing is sufficient for a strong youth program.
- Ensure ongoing empathy interviews include youth and young adults.

When we examine the newly adopted Vision, Mission and Values of CNS, and compare with responses to the survey and interviews, we see many areas of strength in our community. We also see much room for improvement.

Much can be gained by focusing on promoting positive leadership within the synagogue structure: Board leaders, clergy, staff directors. Scrutinize how authority within each of these domains can best advance inclusivity, belonging, and engagement of members. Build on identified strengths, and fill gaps in our effectiveness. Document progress and set dates for review to establish accountability for outcomes.

Chapter V: Implementation Strategy

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

- Business of the Synagogue (BUS)
- Social and Engagement (SOEN)
- Spiritual and Education (SPE)
- A fourth element, creating a Succession Plan for the Executive Director is incorporated in the recommendations found in the Business of the Synagogue (Appendix A)

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 if desired by the Board, and 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 the Fall of 2021. Meeting at least quarterly, the LRP Coordinating Committee will be responsible for coordinating, monitoring and reporting progress toward implementation.
- Vision Mission Values Rollout Committee is designed to roll out the adoption of the mission vision and values.
- 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."

Post COVID review. The committee additionally recommends that at a point in time post-COVID, the recommendations should be reviewed to validate if any new themes have emerged or changed. As much of this report was put together remotely and without the ability to experience the Synagogue on a daily basis in-person, a subsequent review would be useful to determine if there were any amplified recommendations based on the isolation and remoteness of the COVID season or if there are recommendations that should be doubled.

Appendix A

Recommendation of Business of the Synagogue Task Force of the Long Range Planning Committee

Regarding Ultimate Succession Planning for Executive Director Position

The Task Force met with Fred Rothstein to review his current job description, to discuss prospective qualifications for the next Executive Director and to determine the logistics of making the transition when the time comes. The Task Force looked at various governance models for executive directors at synagogues and Temples across North America, and concluded that the current model of our Executive Director serving as CEO of the Synagogue remains the best solution for CNS. With that preliminary conclusion, what follows is a statement of our recommendations to the Board and Kehilla for how to proceed when the time comes:

1. **Job Description for Next Executive Director.** Ideally, the Task Force recommends the job description remain essentially as it is (see attached) with these recommended changes: one, making it gender neutral; two, adding one addition to the responsibilities: Given the focus of the LRP Committee on relational Judaism as applied at CNS, the Task Force recommends that a new item be added to the job description making it clear that (a) the Executive Director is responsible for quarterbacking the efforts of clergy, staff, Board and other lay leaders to ensure regular communications with all members of the Kehilla, and (b) the Executive Director should make relationship-building and -deepening a key component of his/her personal day-to-day activities; three, making it clear that the Executive Director is responsible for creating and updating job descriptions for all non-clergy personnel and ensuring that the Board is apprised of any gaps in coverage or staffing needs not addressed by existing clergy or staff; and four, any updates for circumstances that may arise between the date of this document and the time when the search commences following Fred Rothstein's announcement of his intent to retire.

2. **Qualifications of Next Executive Director.** The Task Force recommends that the next Executive Director be a seasoned professional with significant expertise in each of the areas described in the job description as updated per recommendation #1. Ideally, the next Executive Director will have professional executive Jewish communal leadership experience, will have an educational background in business or Jewish communal service, and will have both a deep and abiding love for Conservative Judaism and have the skills necessary to interact with congregants at their most vulnerable times in life. The Task Force notes that CNS benefited tremendously from Fred Rothstein's social work background, from his Jewish communal educational background, and from his professional Jewish communal career prior to his appointment to the Executive Director role. Ideally, notwithstanding the likely higher salary requirements, the next Executive Director will have at least 8-10 years of increasing responsibility as a Jewish communal professional. While not a specific job requirement, it would be a real plus if the next Executive Director is savvy in social media and has relevant communications and marketing experience. Davening skills are also a plus given the aging nature of our Kehilla and the likelihood of all clergy being occupied from time to time when leading of shiva minyanim is required.

3. **Search Process.** Ideally, Fred Rothstein will provide the Board with at least one year's prior

notice of his intent to retire. We recommend that upon receipt of such notice, the Board convene a search committee to run the search process. We further recommend that the search committee include members with a deep understanding of how CNS functions and the importance of the Executive Director role. Ideally, the search committee will be comprised of 5-7 members with a diversity of ages, interests, past/present Board experience, etc with the committee ideally including at least one member of staff and one interested teen. The search committee should plan to start the search approximately 9 months prior to the date of Fred Rothstein's retirement, and should begin the process by registering the job with NAASE's search site and by posting the job on various Jewish job sites (ie., www.jewishjobs.com). The Board should provide the search committee with a budget for travel expenses and social events for the candidates during the search. The Executive Committee, clergy team and senior staff should all interview the top candidate(s) as determined by the search committee, and ideally the full Board and the congregation should be afforded the opportunity for social interaction with finalist(s) for the position. The top candidate(s) should also meet privately with Fred Rothstein. If the top candidate(s) are from out of town, at least one trip should include the candidate's spouse/significant other and there should be social activities for the spouse/significant other so they too get to know CNS. Given budget preparation in the Spring along with High Holiday and full fiscal year planning in April-July, the ideal timing for the new Executive Director to start will be during that time frame. In any event, the search committee should plan on a national search lasting 6-9 months.

4. Onboarding of New Executive Director. We recommend there be a 2-3 month overlap between Fred Rothstein and the new Executive Director. There is so much unwritten in the day-to-day job of the Executive Director and thus it is highly valuable to permit the overlap, even if Fred Rothstein is no longer in the office every day or all hours of the day. It's a fine balance as the new Executive Director must establish his/her own relationships and begin to feel empowered, but the reality is there will be much for Fred Rothstein to impart to the new Executive Director to ensure their success. It would be helpful, however, if the New Executive Director can have periodic access to Fred Rothstein even after the initial 2-3 month overlap given how difficult it will be for Fred Rothstein to download to the New Executive Director the history and issues of CNS. We further recommend that the New Executive Director meet on a one-on-one basis at least weekly with the Senior Rabbi and with the President in separate meetings during that 3-month break-in period and as often as feasible after that initial 3 months. Those relationships in the 3-legged stool (Senior Rabbi, President, Executive Director) are so important that this regular weekly cadence must be a priority in the early months of the new Executive Director's tenure. At some time shortly after the new Executive Director starts, the Synagogue should hold a special invocation ceremony with the entire Kehilla (perhaps a Friday night service and dinner) to welcome the new Executive Director and to cement in the minds of the Kehilla the high level of importance/responsibility the new Executive Director plays in the Synagogue and to honor the new Executive Director commensurately.

The Task Force expresses its gratitude to Fred Rothstein for all of his time and thoughts. We believe the Synagogue has been very fortunate to have such a capable, talented and mensch-defining executive in Fred Rothstein, and while outside the scope of the Task Force's mandate for this piece of our work, we recommend that the Board, clergy and staff fete Fred Rothstein appropriately upon his eventual retirement in a manner befitting the huge impact Fred Rothstein has had on CNS during his 20+ years as our Executive Director.

CONGREGATION NEVEH SHALOM

EXECUTIVE DIRECTOR

JOB DESCRIPTION

The Executive Director serves as the Chief Executive Officer of the Congregation, representing the officers and directors in administering the affairs of the Congregation. He works in partnership with the clergy and lay-leaders in recommending synagogue policies. The Executive Director assumes responsibility for loyalty to the purpose of his Congregation and promotes its services in carrying out the administrative policies established by the Congregation. Areas of responsibility and duties are many, broad and varied, but include the following:

General

1. Facilitates the effective implementation of the broad policies and direction established by the Board of Directors regarding the congregation's finances, facility use, membership, dues collection and program and policy administration
2. Works closely with the Board of Directors and Clergy to enhance the achievement of the congregation's mission
3. Assists members and clergy in life-cycle events and other religious needs of the Congregation, as appropriate
4. Utilize appropriate techniques, concepts and resources to the end that Congregation Neveh Shalom will better serve the needs of its members, the Jewish People and the community
5. Foster a warm and caring environment so that the synagogue is a place where congregants and staff feel welcome, respected, nurtured and appreciated
6. Extend goodwill and understanding to all individuals who interact with the synagogue in both official and unofficial capacities and embody to everyone the principles of Judaism upon which our congregation is built
7. Should be encouraged and provided the opportunity for professional growth
8. Serves as a Jewish role model within the congregation and community

Management, Administration and Staff Leadership

1. Supervise and manage all administrative activities and functions
2. Recruit, train, supervise and dismiss (when necessary) synagogue staff, including professional department heads, office support and building maintenance personnel
3. Establish personnel guidelines and policies (subject to the approval of the Personnel Committee and Board of Directors)

4. Allocate personnel work loads, assignments and work flow among the various staff members to ensure the timely and effective completion of work tasks
5. Arrange and coordinate regular meetings of the professional staff to discuss ongoing issues of synagogue operations and management
6. Constructively mediate interpersonal conflicts between members of the staff and resolve disputes as amicably as possible
7. Promote the professional and vocational development of the staff and ensure that their knowledge remains current
8. Ensure that the proper systems are implemented to handle membership data, fiscal reporting, dues collections, publications, High Holy Day arrangements, yahrzeit information, and other materials that are necessary for the smooth operation of the synagogue
9. Evaluate and acquire computer hardware and software for the efficient accomplishment of administrative needs and to maintain more effective communication with the congregation's members
10. Maintain a calendar of synagogue activities and religious services that provides for their implementation
11. Provide oversight of the synagogue's buildings, grounds, cemeteries and building security needs
12. Supervise and coordinate all activities relating to the cemeteries of the congregation

Lay Leadership

1. Provide staff support, attend and participate in Executive Committee and Board of Directors meetings (without voting rights)
2. Provide training opportunities for Board and leadership development
3. Facilitate Board members' understanding of their roles and responsibilities
4. Serve as a resource to advise the Board, its officers and committees on various matters when such information and advice is solicited or needed
5. Serve as a resource to the Nominating Committee and provide input regarding the recruitment or retention of Board members
6. Interacts with individual members and groups of members to assist them in fulfilling their needs and desires as expressed through their affiliation with the congregation
7. Works to expand member involvement and develop new leadership
8. Assists synagogue-affiliated groups and their committees in planning and implementing their programs and policies

Fiscal Management

1. Supervises financial planning and management including the preparation and oversight of the synagogue budget
2. Serve as central coordinating individual for staff and lay leadership in development of operating budget process and plan
3. Supervises and recommends all purchasing through proper committees
4. Offer administrative support and direction for fundraising projects and development activities of the congregation
5. Serve as the professional staff resource for the Budget & Finance committee and the investment trust committee
6. Provide oversight for the activities of the Office (Business) Manager in all day-to-day aspects of the synagogue's fiscal affairs including cash management, accounts receivable and payable, payroll and preparation of regular financial statements

Appendix B

Long-Range Planning Committee Members 2020-2021

Nathan von Colditz, Co-Chair

Stephanie Arnheim, Co-Chair

Leah Conley, Staff Liaison

Alan Blank

Alex Menashe

Danit Rothstein

Dann Horowitz

Debbie Plawner

Gary Peck

Holly Eby

Jaimie Harper

Jennifer Kalenscher

Josh Wnuk

Karen Twain

Marissa Richardson

Mark Sherman

Toby Shulruff

Advisors

Fred Rothstein, Executive Director

Glen Coblens, President

Appendix C

Empathy Interview Questions:

1. Tell me about a time you felt connected to the CNS community.
2. Tell me about a time you did not feel connected to the CNS community.
3. Tell me about a time you did not get the support you needed spiritually at CNS.
4. Tell me about a time or place you felt like you could show up as your authentic self.

Recurring Themes from Empathy Interviews

Spiritual/Holiday & Life Cycle/Pastoral Care

Done well:

- Life cycle events make great memories/impressions
- Morning minyan, downstairs minyan, Tot Shabbat build connection and belonging through community participation
- Morning minyan was able to maintain feel of community on zoom during pandemic
- Experience of belonging at morning minyan (pre and post pandemic)
- Shoreshim and Tot Shabbat created life-long friendships
- Downstairs minyan as a home for my whole family (pre and post pandemic)
- B'nai Mitzvah experience connected me to the community
- Feeling connected at funerals
- Previous services that no longer exist built feeling of connection through participation including chik chok, Keva, and 8:15 Friday night service
- High Holidays built connection through seeing the whole community
- Level of lay led and youth participation is wonderful
- **Recommendation** – help congregants find a community for all the days of their life as they grow and age (Tot Shabbat to Downstairs Minyan)

Missed:

- Many volunteers and staff involved in pastoral care without recognition, feeling of resentment grows
- Accessibility of older congregants to get to services (transportation issue) breaks down feelings of connection.
 - Many don't drive at night
 - Some have stopped driving all together
- Many families feel unwelcome in the main sanctuary due to the shushing of their children.
- Main service as too performative and less embracing of community as participatory
- Marginalized experience of interfaith families by clergy
- Main service bantering between senior rabbi and cantor not welcoming, feels exclusive
- Lack of presence of 20's, 30's, empty nesters, and widowers
- No opportunity to connecting with others during main service, longing for more opportunities of connection

- Importance of inclusion of all participants during services in main sanctuary

Staff/Clergy

Done well:

Rabbi Stampfer – life-long connection

Connection through synagogue built through relationship with key clergy and education staff

Missed:

- Clergy not attending morning minyan (even occasionally)
- Inconsistent messaging from clergy to members feels like leadership is missing
- Female congregants report that Rabbi Kosak seems more focused on connection with male congregants
- Clergy unable or unwilling to do appropriate pastoral care, congregants feeling lack of connection
- Felt supported by staff and not clergy
- Help clergy feel supported to feel they have the bandwidth to help others
- Multiple experiences with clergy that show lack of understanding of congregants perspective (felt rude and out of touch)
- Lack of leadership
 - No responsive communication during political/national issues
 - Shul has lack of follow through when a plan is made; issue of implementation
 - Feels like there is no transparency around decision making process in synagogue
 - Board & Exec Committee need to do better job supervising & evaluating clergy

Connection/Belonging/Community

Done well:

- Havurahs have created some great life-long friendships
- CNS feels like extended family (especially for those without family living in PDX)
- Lay led and clergy led experiences
- Hebrew School creates great experiences for kids and families
- Feels connection so many times in learning, celebration and praying

Missed:

- Interfaith families not feeling welcome
- There is a need to systemize and recognize the effort required to achieve the huge number of human touch points by non-clergy, staff, and volunteers
- Older members feel less of a connection than when kids were younger and in school
- Feeling lost in the system of a large congregation
- Cliques deterring belonging and connection
- Lack of timely responsive communication around nationally concerning issues
- Lack of social justice work opportunities (Tikkun Olam)

- Large organization feels disconnected and unseen
- Feeling like money talks (income related to feeling welcome)
- Men's Club feels unwelcoming and cliquish
- Need to create connections with like-minded groups (single parents, empty nesters). Groups on the fringes beyond traditional family units.

Education

Done well:

- Foundation School – lots of connection for families
- Shoreshim, Tot Shabbat great programs
- USY (when active) is great for the kids
- Working in the synagogue in an educational role makes me feel connected
- Family connection felt through Camp Schechter
- Strong connection through education built through CNS (Foundation School & Aliyah)

Missed:

- Challenge for some transitioning from PJA to CNS
- Lack of connection between Foundation School and CNS
- Disconnect between formal and informal education (Aliyah and USY)

Pandemic

Done well:

- Morning minyan on Zoom during Covid well received
- Downstairs minyan on Zoom during Covid very participatory
- Online services

Missed:

- Easy to fall away from CNS because of the crisis (for child and family)
- Gathering before and after services are missed. Zoom is not the same.

Other

Missed:

- Feels like there is no transparency around how decisions are made in the synagogue
- Administrative billing is a turn off (pre new solution rollout)
- "Why do I want to give money when they only call me to get money?"

Appendix D

Congregational Survey Results

A survey was sent out to the whole congregation to assess congregants' general level of satisfaction/dissatisfaction, identify needs and concerns, and determine their attitudes about a variety of issues including future growth, community-building and communication. Although designed as a tool for long range-planning, the survey has also revealed important information of interest to the clergy, professional staff, and Board of Directors, since it has been 10 years since congregants' opinions have been sought in such a comprehensive manner. We received 316 responses to our questions. A wide variety of views were shared and overall the response was very positive. The responses and findings were used to create many of our recommendations.

Questions & Responses

CNS is a meaningful part of my/my family's life

Strongly Agree: 37.94%
Agree: 50.48%
Disagree: 8.04%
Strongly Disagree: 2.25%
N/A: 1.29%
Total # responded: 311

CNS helps me/my family to feel connected to Judaism

Strongly Agree: 38.78%
Agree: 52.88%
Disagree: 5.45%
Strongly Disagree: 1.92%
N/A: 0.96%
Total # responded: 312

CNS helps me/my family to feel connected to the Portland Jewish Community

Strongly Agree: 28.16%
Agree: 53.07%
Disagree: 13.27%
Strongly Disagree: 2.27%
N/A: 3.24%
Total # responded: 309

CNS helps me/my family feel connected to the Conservative Jewish Movement

Strongly Agree: 19.80%
Agree: 52.81%
Disagree: 15.84%

Strongly Disagree: 2.97%
N/A: 8.58%
Total # responded: 303

I feel welcome at CNS

Strongly Agree: 46.65%
Agree: 45.05%
Disagree: 5.43%
Strongly Disagree: 2.88%
N/A: 0%
Total # responded: 313

CNS meets my/my family's religious needs

Strongly Agree: 31.29%
Agree: 52.90%
Disagree: 10.97%
Strongly Disagree: 2.58%
N/A: 2.26%
Total # responded: 310

The clergy are accessible and responsive to my needs and concerns

Strongly Agree: 45.85%
Agree: 40.20%
Disagree: 4.32%
Strongly Disagree: 2.66%
N/A: 6.98%
Total # responded: 301

The professional staff is accessible and responsive to my needs and concerns

Strongly Agree: 44.37%
Agree: 45.03%
Disagree: 4.64%
Strongly Disagree: 0.66%
N/A: 5.30%
Total # responded: 302

The office staff is courteous and responsive to my needs and concerns

Strongly Agree: 53.42%
Agree: 40.07%
Disagree: 2.28%
Strongly Disagree: 0.65%
N/A: 3.58%
Total # responded: 307

CNS provides/has provided an adequate Jewish education for my children

Strongly Agree: 31.29%
Agree: 27.89%
Disagree: 8.50%
Strongly Disagree: 2.04%
N/A: 30.27%
Total # responded: 294

CNS provides an important source of social interaction & friendships for me/my family

Strongly Agree: 25.59%
Agree: 42.76%
Disagree: 18.18%
Strongly Disagree: 7.07%
N/A: 6.40%
Total # responded: 297

There are many opportunities for me/my family to participate in synagogue life

Strongly Agree: 29.33%
Agree: 53.33%
Disagree: 9.33%
Strongly Disagree: 4.00%
N/A: 4.00%

Total # responded: 300

In your opinion, what groups in the congregational family could benefit from additional programs and activities

Top 5 groups:
Seniors (65+) 35.7%
Adults (35-64) 27.31%
Empty-nesters 24.37%
Young adults (18-34) 22.69%
Interfaith Couples 22.27%
238 responses with 79 skipped answering this question

Bottom 4 categories: Divorced, Young Families, Russian-Americans and Preschool Children

APPENDIX E REFERENCES

ARTICLES

How USY 'killed' membership (and why It had It coming)

Eliminating membership enables USY to develop a system to define success and engagement on our terms

https://ejewishphilanthropy.com/how-usy-killed-membership-and-why-it-had-it-coming/?fbclid=IwAR3MRE6DF9REleg3TPq1t0l_FyVIh1pY5U6Aq3SIHkTT56WyJfDBxdLGt1U

Jewish Americans in 2020

U.S. Jews are culturally engaged, increasingly diverse, politically polarized and worried about anti-Semitism

<https://www.pewforum.org/2021/05/11/jewish-americans-in-2020/>

2021 Pew Study - Update on American Jewry - "The "Nones" Still Win

Synagogue Innovation in the Age of Corona and Beyond

<https://ejewishphilanthropy.com/synagogue-innovation-in-the-age-of-corona-and-beyond/>

How the Lessons of Covid Will Shape the Synagogue of Tomorrow

A rabbi asks his congregation what the future holds. Their answers provide a blueprint for innovation.

<https://jewishweek.timesofisrael.com/how-the-lessons-of-covid-will-shape-the-synagogue-of-tomorrow/>

THE SYNAGOGUE EXECUTIVE DIRECTOR: A CHANGING ROLE FOR CHANGING TIMES

[THE SYNAGOGUE EXECUTIVE DIRECTOR: A CHANGING ROLE FOR CHANGING TIMES](#)

BOOKS

Next Generation Judaism by Rabbi Mike Uram

Relational Judaism Handbook by Dr. Wolfson, Rabbi Nicole Auerbach and Rabbi Lydia Medwin