



United Synagogue of Conservative Judaism

VeAsu Li Mikdash* :
An Updated Strategic Plan for the
New United Synagogue of Conservative
Judaism

3 Year Update by

Rabbi Steven C. Wernick, CEO

Jerry Herman, COO

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Rapaport House
820 Second Avenue
New York, NY 10017
646-519-9300
TDD: 212-260-7442
Fax: 212-353-9439
Web Site: www.uscj.org

The Shirley & Jacob Fuchsberg Jerusalem Center
of The United Synagogue of Conservative Judaism
P.O. Box 7456 Jerusalem 94265 Israel

* “And let them make me a sanctuary...” (Exodus 25:8)

Committee Members

Howie Sniderman, Chair; Edmonton, Alberta, Canada

Dr. Jacob Finkelstein; Rochester, New York

Michael Greenberg; Woodmere, New York

Jerry Herman, USCJ COO

Scott Kaplan; Atlanta, Georgia

Temma Kingsley; Forest Hills, New York

Dr. Vivian Saper; Palo Alto, California

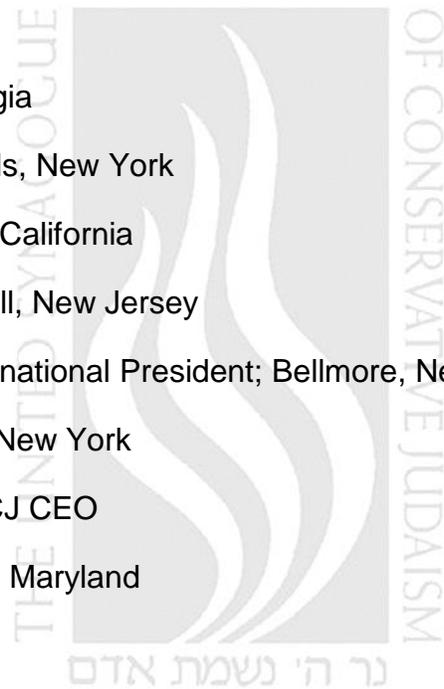
Naomi Schimmer; Cherry Hill, New Jersey

Richard Skolnik, USCJ International President; Bellmore, New York

Marty Werber; Great Neck, New York

Rabbi Steven Wernick, USCJ CEO

Dr. Marilyn Wind; Bethesda, Maryland



Contents

Transmittal Letter	Page 3
Introduction	Page 4
Executive Summary	Page 6
Strategic Plan	Page 11
Next Steps	Page 23
Appendix: The Case for a New United Synagogue (March 2011)	Page 24



Transmittal Letter

Dear Friends,

Regular and ongoing evaluation and re-assessment of goals is the hallmark of progress. The adoption of our Strategic Plan (VeAsu Li Mikdash) in March 2011 put USCJ squarely on track to focus on renewing, re-energizing and re-visioning its core mission functions in the lead up to the celebration of its centennial. Not “Back to the Future” but very much “Forward into the Future” was, and remains, the vision and mission.

Three years into the implementation of our Strategic Plan it is appropriate and prudent to complete a review and update. We have learned much and accomplished much while working toward the goals set for ourselves. At this juncture, we recognize and see the need to clearly state the priority areas that we will pursue in the coming months and years.

The goal of our Strategic Plan Review Committee has been to gather and assess the information needed to prepare an update to USCJ’s Strategic Plan. We are all indebted to the many members of USCJ’s professional staff and of our Board of Directors who have provided insight, analysis and a thoroughly collaborative atmosphere for the review, reflection, and synthesis of this update to the Strategic Plan.

I wish to pay particular tribute to my fellow members of the Strategic Plan Review Committee and to USCJ’s President Richard Skolnik, CEO Rabbi Steven Wernick and COO Jerry Herman for the many long hours of focused deliberation, discussion and just plain hard work. We are proud of what has been accomplished by USCJ in the three years since adoption and implementation of the goals and priorities established by our Strategic Plan. We are excited about the future for USCJ, as we now focus on our updated goals and priorities.

B’shalom,

Howie Sniderman
Chair – USCJ Strategic Plan Review Committee 2014

Introduction

Three years ago, a group of committed Jewish leaders drew up a blueprint for the transformation of United Synagogue.

Underpinning the effort were two core beliefs – first, that it is essential to sustain and nurture a vital religious center in North American Judaism, and second, that congregations remain the single most important institutions for doing so. With synagogues facing mounting challenges, it was clear that United Synagogue must once again become an effective, trusted partner for Conservative congregations striving to be places of meaning and purpose for North American Jews.

The resulting strategic plan, *VeAsu Li Mikdash* (“And let them make Me a sanctuary”), laid out a bold yet practical roadmap for United Synagogue to restructure itself so it could do just that.

Now, in 2014, we have revisited that roadmap – using the experience and learning of the last three years to set the smartest course for the future. The updated and revised plan we now present is the result of careful reflection on our work since 2011 and the answers to critical questions, including: Where have we had the most meaningful impact? What have proved to be our greatest strengths? Are we deploying our limited resources where they’re needed most and – crucially – in areas where we can make a real difference? Finally, which ideas and strategies made sense in 2011, but should be revised or even let go in 2014?

Using Experience to Inform the Future

Kehilla Strengthening and Leadership: The 2011 strategic plan rightly noted that one of the biggest challenges facing our congregations was a dwindling leadership pipeline. By the end of June, we will have helped more than 50 congregations identify and engage a cadre of 1,000 new leaders through our Sulam for Emerging Leaders program. We have also worked intensively with kehilla leaders on strategic planning – articulating a vision for their congregations, aligning their resources with that vision, and navigating the process of organizational change. More than 250 kehillot are now engaged in learning and/or action communities through our Sulam initiatives.

We know that the strength of our congregations – both spiritual and financial – depends on effective leaders working together with a clear vision, and our 2014 strategic plan calls for continuing our work in this area. Based on experience, we will also change the delivery and focus of some of these services. For instance, we will increase our capacity for baby boomer engagement, strategic planning, large congregations, collaborations and consolidations, and more. Our overarching goal is to be a partner to our kehillot in increasing their excellence in creating compelling Jewish community.

Young Children and Families: From our own learning and from the findings of the Pew Research Center’s “Portrait of Jewish Americans,” we know there are crucial age groups that we must engage to secure the future of a centrist Judaism in North America. Our work with thousands of young children and their families through a grant from the Harold Grinspoon Foundation (PJ Library) has shown the impact of helping synagogues engage this demographic, which includes many unaffiliated and interfaith families. Thanks to continued support from the Grinspoon Foundation, we will expand our work in this area and will launch new pilot projects specifically aimed at families and young children. We will also continue our extensive work

helping strengthen synagogue preschools by connecting our early childhood consultant to family engagement; increasing our overall capacity in this important area of engagement

Re-engaging Baby Boomers and Older Adults: We know that baby boomers and older adults are hungry for meaningful Jewish engagement. Our plan includes resources to help congregations understand the needs and potential of this underserved demographic.

Launching New Kehillot: Population patterns in North America have changed in the last decades, but our synagogue locations have not changed with them. While some areas can no longer sustain a formal kehilla, others have young adults, young families, and others who connect deeply with our vision of Jewish life. The Pew study emphasizes the dire need for us to better connect with younger Jews; we believe that seeding new kehillot is a powerful way to begin doing so. This updated Strategic Plan increases the priority level of this work and spells out three approaches to growing the impact of Conservative Judaism through young adult engagement.

Learning for Middle-Grade Children and Teens: We know the impact of Jewish learning on teens. Now the Pew study has shown that every year of learning beyond eight years has an *exponentially greater impact on teen Jewish engagement*. That's why we will continue our work of expanding the breadth and depth of our USY programs and the experiential learning they offer. In the past year, these programs have attracted significant philanthropic investment, and we will pursue further funding to allow us to increase the number of young people that we connect to Jewish life in North America and Israel. For middle grade children, we believe we can have the most impact by becoming transformation specialists in the area of congregational schools, as we have for kehilla leaders generally through Sulam. We will invest in educational leadership, vision, strategies, change management, and helping educational leaders integrate their work into the larger mission and vision of their congregation.

Marketing, Communications and Branding: Over the last three years, we have made extraordinary progress in strengthening United Synagogue and in beginning to transform and strengthen Conservative kehillot and Conservative Judaism. But we have lacked the resources to tell our story. It's time to invest in marketing and communications – to share our successes and those of Conservative Judaism with our stakeholders, philanthropists, and the Jewish world.

USCJ Leadership: Finally, we must recreate a leadership pipeline for United Synagogue itself. The turnaround of our organization is at a point where we can once again attract the best and brightest Jewish leaders to our cause. Now we must redouble our efforts in doing so.

Looking Forward

Three years ago, the authors of USCJ's strategic plan wrote: "This is the moment of truth for USCJ. In many ways this plan is about seizing the moment." Today, we know that we did seize the moment. We put our organizational house in order. We made tremendous strides in becoming a trusted, effective partner to our kehillot.

But the work is not finished. Now, with our major restructuring behind us, we are in a position to look forward, and to use every tool in our arsenal to help reconnect North American Jews with the energy and passion of Conservative Jewish life.

Executive Summary

Note: Readers are advised to read *either* the Executive Summary *or* the Strategic Plan. All material in the Executive Summary is contained, word-for-word, within the text of the plan.



The Vision

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

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

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

The Mission

- To transform and strengthen our kehillot in a collective effort to create a mutually supportive community that will:
 - inspire meaningful prayer
 - sustain a culture of life-long Jewish learning
 - nurture religious and spiritual growth
 - foster the living of a purposeful Jewish lifestyle for the 21st century
 - promote excellence in kehillah leadership
- To ensure educational excellence true to the vision of Conservative Judaism for families, children and adults in our kehillot
- To engage the next generation of kehillah leadership.
- To encourage and build new kehillot.

The Language of “Kehilla”

The change in language from “synagogue” or “congregation” to “kehillah” is more than semantic. It reflects two concepts: First, it focuses on the *raison d’être* of a congregation or synagogue, i.e., that it is a sacred community. Second, it signals a welcome to those who resonate with the ideas of Conservative Judaism as expressed in the vision statement, but who do not necessarily belong to official Conservative congregations or feel comfortable with the “Conservative movement” label.

Recommendations

This plan update includes six strategies to maintain and grow the new United Synagogue of Conservative Judaism and its member kehillot:

- **Focus on core functions**
- **Create and launch a comprehensive approach to branding, marketing and communications**
- **Build new models of membership, participation, leadership and governance**
- **Expand and redeploy financial resources**
- **Increase Israel engagement experiences and implement the Fuchsberg Jerusalem Center Strategic Report**
- **Create and implement an integrated convention strategy**

I. Focus on core functions

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

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

2.0 The USCJ should embark on a significant effort to help kehillot, sacred communities, reinvent themselves for the 21st century.

3.0 USCJ's educational mission should have four components:

- Strengthening and transforming early childhood and family engagement (the entry point) and teen learning (the major drop-off point).
- For the middle grades, offering congregational school leaders “transformational” expertise – i.e. training in educational leadership, vision, strategies, change management, and integrating their work into the larger mission and vision of their congregation.
- Creating synergy among the components of the system. Different elements of the educational system should reinforce each other.

- Identifying and disseminating integrated educational models, especially models that integrate formal and experiential Jewish education for individual kehillot.

4.0 USCJ should create an Institute for Jewish Young Adult Engagement that seeds and nurtures new kehillot and engages the next generation of kehilla leadership.

II. Branding, communications and marketing

5.0 USCJ needs a new brand identity and name that aligns with the new vision and mission that reflects the new focus on kehillot and explains the valuable unique role of USCJ in Conservative Judaism and beyond.

6.0 USCJ needs a comprehensive communication plan that addresses internal and external stakeholders and public relations.

III. New models of leadership, governance and participation

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

Governance

8.0 USCJ should create a governance committee to address bylaws and operating standards and procedures issues as necessary.

Participation

9.0 USCJ should create a lay engagement system to accomplish the following functions: governance, committee expertise and task forces, local lay leadership engagement and local volunteer engagement so as to foster ongoing USCJ leadership. The commitment to vision, mission and the three core functions needs consistency across all geographic areas.

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

IV. Expand and redeploy financial resources

11.0 USCJ should focus revenue expansion on financial resource development (FRD).

- 12.0 USCJ should develop a planned giving and endowment program for itself and for member kehillot.**
- 13.0 USCJ should develop a plan to strategically monetize its real estate assets in New York and/or in Jerusalem to replenish certain cash reserves, lower its occupancy and other overhead costs and unlock the investment capital necessary to support the growth areas identified in this strategic plan.**
- 14.0 USCJ should review non-core function business areas for mission congruence and cost benefit to determine their future place in the organization.**
- 15.0 USCJ should change the dues formula, reduce dependency on kehillah dues as a percentage of USCJ's total revenues, and as resources become available create an incentive program, perhaps through a dues set aside or grant program, for communal collaborations and partnerships.**
- 16.0 USCJ should explore the possibility of developing new revenue centers, focusing on products and services above and beyond the membership package, that reduce USCJ's funding share of certain programs or create new revenue sources.**
- 17.0 USCJ should continue to invest and improve operational efficiencies and metrics for itself and for its network.**

V. Israel Engagement and the Fuchsberg Jerusalem Center

- 18.0 The Fuchsberg Jerusalem Center should continue to implement the recommendations of the blue ribbon commission and become a wholly owned subsidiary of USCJ.**
- 19.0 USCJ should expand its short term and long term Israel immersion experiences for teens, young adults, families and adults.**

VI. Create and implement an integrated convention strategy

- 20.0 USCJ should make its conventions a centerpiece for showcasing its key priorities and programs.**



A Vision and Mission for the New USCJ

The Vision

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

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Recommendations

This plan update includes six strategies to maintain and grow the new United Synagogue of Conservative Judaism:

- **Focus on core functions**
- **Create and launch a comprehensive approach to branding, marketing and communications**
- **Build new models of membership, participation, leadership and governance**
- **Expand and redeploy financial resources**
- **Increase Israel engagement experiences and implement the Fuchsberg Jerusalem Center Strategic Report**
- **Create and implement an integrated convention strategy**

I. Focus on core functions

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

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

2.0 **The USCJ should embark on a significant effort to help kehillot, sacred communities, reinvent themselves for the 21st century.**

USCJ's first priority is to partner with kehillot in their striving for excellence, encouraging them to challenge themselves in a continuous process of self-improvement. The goal of this effort is to build community – to cultivate effective change-oriented leadership, to provide engaging prayer, adult learning, and adult spiritual development, as well as meaningful programs. USCJ will provide kehillot with programmatic and managerial resources to help expand membership, increase participation, create a welcoming environment, cut costs, increase revenue and operate efficiently.

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

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

2.1.1 Using its Sulam leadership initiative and others, USCJ should expand and enrich its strengthening and transformation learning and action communities to create the most compelling Jewish kehillot of the 21st century.

2.1.2 Develop Management “Toolboxes” that allow kehillot to upgrade capabilities, better systematize their operations, take advantage of USCJ’s network of member kehillot, create opportunities for collaboration amongst kehillot and between USCJ and member kehillot; all in order to help stabilize and reduce the costs and the burden of the business side of kehillot (e.g., information services, marketing and communications, human resources, budgeting, revenue and cost management, financial resource development, facilities management, security, new technology, membership services, insurance, purchasing).

2.1.3 Connecting kehillot with program expertise (e.g., engaging baby boomers, young family engagement, interfaith engagement, etc.) and content expertise (e.g. prayer, adult learning, etc.).

2.1.4 Engaging Baby Boomers requires special priority and focus. We have approximately a five year window to capitalize on this important age cohort. Conservative Judaism skews to the 55+ age group which can be an asset if we leverage their interests in building the foundation of their communities for their grandchildren. As Rabbi Ed Feinstein has said, “We need to build the synagogues of our grandchildren’s dreams, not those of our grandparents.”

2.1.5 Provide “Transformational” expertise to the particular opportunities and problems associated with different types of kehillot (one size does not fit all), including addressing the differing needs of:

- small, medium, and large kehillot;
- growing, stable, and declining kehillot;
- kehillot working in collaboration with or merging with other kehillot; and
- kehillot located some distance from concentrated Jewish population centers.

2.1.6 Explore and implement centralized purchasing power and economies of scale programs that are offered to kehillot which save them money and time in all major expense areas of their operating budgets as feasible and available.

2.2 USCJ should use a number of methods to strengthen and transform kehillot, including:

- Expert consultation
- Tested “turnkey” programs (reflecting best practice)
- Opportunities for kehillah professional and lay leaders to network in order to learn from each other (both in-person and web-based)
- Relevant information in user-friendly formats (including web-based resources)

Providing such a broad array of transformative services requires USCJ to develop new core competencies. As it is not feasible for USCJ to develop competency in so many different areas, we will need to reimagine and reorganize the Kehilla Relationship Manager delivery system and make extensive use of external resources.

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

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

3.0 USCJ's educational mission should have four components:

- Strengthening and transforming early childhood and family engagement (the entry point) and teen learning (the major drop-off point), with a particular emphasis on USY as well as unengaged teens
- For the middle grades, offering congregational school leaders ‘transformational’ expertise – i.e. training in educational leadership, vision, strategies, change management, and integrating their work into the larger mission and vision of their congregation.
- Creating synergy among the components of the system. Different elements of the educational system should reinforce each other.

- Identifying and disseminating integrated educational models, especially models that integrate formal and experiential Jewish education for individual kehillot.

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

- Expert consultation
- Tested “turnkey” programs (reflecting best practice)
- Opportunities for educators and education lay leaders to network in order to learn from each other (both in-person and web-based)
- Relevant information in user-friendly formats (including web-based resources)

3.2 USCJ, as reflected in “A New Paradigm for Jewish Learning Under Conservative Auspices”, should partner with institutions and organizations that have the specific expertise and responsibility for different dimensions of the educational enterprise identified with Conservative Judaism:

- Camping - The Ramah Commission
- Congregational education - Jewish Educators Assembly, Jewish Youth Directors Association
- Day school education - The Schechter Day School Network
- Research and training - The Davidson School at JTS and the Fingerhut School at American Jewish University

4.0 USCJ should create an Institute for Jewish Young Adult Engagement that seeds and nurtures new kehillot and engages the next generation of kehilla leadership.

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

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

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

- USCJ needs to use Jewish population research to identify areas of growth.
- 4.2 USCJ and Conservative congregations should nurture new and emerging independent kehillot, which tend to engage singles and young adults who are married without children. Supporting them today could help build Conservative kehillot tomorrow.
 - 4.3 USCJ should support both new and emerging kehillot with consultation, technical assistance and financial resources (e.g., ignition grants or the like).
 - 4.4 USCJ needs to engage young Jewish leaders -- both Conservative and post-denominational -- in a serious conversation about how USCJ can best respond to the search for Jewish community in their generation. In the words of a comment by a JTS-ordained rabbi in *Sh'ma*, "A multigenerational mix of Jewish leaders might challenge the unhelpful dichotomy between innovators and establishment, enduring institutions and inchoate new ventures, "insiders" and "outsiders." In our own ways, we might focus on the shared task of making Judaism relevant and meaningful in the future."¹
 - 4.5 It is recognized that a continuing Conservative Judaism presence on campus is vital to maintain the bridge between our high school students and the young adult post-college generation. It is not clear who should fund this effort and what the effort should look like. USCJ should continue to engage with college student leaders and leaders of Conservative Judaism and others to determine how we can best work in partnership to ensure that our presence on the college campus not only remains but grows and to talk to significant potential philanthropists for funding a results oriented and consequential effort on campus.

II. Branding, communications and marketing

5.0 USCJ needs a new brand identity and name that aligns with the new vision and mission that reflects the new focus on kehillot and explains the valuable unique role of USCJ in Conservative Judaism and beyond.

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

¹ Nussbaum, Rachel 'GenXers and Boomers: Humility and Tzimtzum'

6.0 USCJ needs a comprehensive communications plan that addresses internal and external stakeholders and public relations.

6.1 Transform and expand USCJ's marketing and communications channels into an integrated system of engaging, timely and consistent multi-media information that:

6.1.1 Enhances the perception of USCJ as a valuable trusted partner in strengthening kehillot and as an effective advocate for and leader of Conservative Judaism.

6.1.2 Tells the stories of success and dynamic change at USCJ, our kehillot and within the "center" of North American Jewry.

6.1.3 Serves kehillot by supplying timely, useful and relevant information and resources.

6.1.4 Uses digital communication to create a more networked organization.

6.1.5 Allows for marketing (segment outreach) and state of the art program materials.

6.1.6 Promotes and engages conversation about our vision of Judaism.

6.1.7 Reflects the excellence of the new USCJ.

6.2 Make CJ Magazine and CJ Online the place for conversations among Conservative Jews.

6.3 Add value to kehillot by providing marketing toolkits and social/media/tech/website training and support.

III. New models of leadership, governance and participation

Leadership

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

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

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

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

- 7.1 The majority of the leaders of the new USCJ should be drawn from a pool of philanthropic investors, who are capable of, and motivated to, make significant investments in the new USCJ.
- 7.2 A second group of leaders should be thought leaders – people who have the intellectual stature to influence the course of North American Judaism, especially the course of Conservative Judaism.
- 7.3 A third group of leaders should be organizational leaders – people who have a demonstrated track record of judgment and wisdom in the Jewish organizational world, including, but not limited to United Synagogue.
- 7.4 Board members should commit to a significant annual contribution to USCJ consistent with the giving standards of other major Jewish organizations in North America either through a direct personal contribution or by engaging others to contribute.²

Governance

8.0 USCJ should create a governance committee to address bylaws and operating standards and procedures issues as necessary.

Participation

9.0 USCJ should create a lay engagement system to accomplish the following functions: governance, committee expertise and task forces, local lay leadership engagement and local volunteer engagement so as to foster ongoing USCJ leadership. The commitment to vision, mission and the three core functions needs consistency across all geographic areas.

- 9.1 Board of directors and advisory committees work with CEO and COO in the fulfillment of fiduciary, including governance, responsibilities to USCJ.

² The Strategic Planning Commission discussed an annual \$10,000 gift, on a “give or get” basis, as an appropriate expectation.

- 9.2 Local lay leaders work with USCJ Treasurer, dues leaders, Senior Kehilla Relationship Manager (KRM) and others, as appropriate, on variance process and dues collection.
- 9.3 Standing committees should be populated by lay leaders with expertise in their function area and work with professional staff in the successful implementation, evaluation and development of that function.
- 9.4 From time to time the president and or CEO may create an ad-hoc lay leader task force to address specific issues or opportunities.
- 9.5 Local lay leaders should perform honorific duties on behalf of USCJ, representing USCJ at local ceremonies, celebrations and etc. This function is coordinated with Senior KRMs.
- 9.6 In consultation with the District Chair and Council, local lay leaders should engage as the primary connectors (kehilla ambassadors) to those kehillot identified by KRMs as benefitting most from lay to lay relationships. The Kehilla Ambassadors will coordinate with the Senior KRMs.
- 9.7 Lay leaders should be engaged through local cooperative projects that bring kehillot together around particular social justice issues. These could include partnerships with other organizations such as the JCPA, Mazon, Hazon, disability, etc.
- 9.8 A staff member should be assigned as an engagement coordinator to manage the volunteer pipeline and cultivation of lay leaders amongst USCJ's various departments and systems as well as from amongst those engaged pursuant to sections 9.4 and 9.7 above.

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

- 10.1 USCJ needs to be a single organization with a clear continent-wide identity. It should create an effective balance between the district perspective - which reflects important cultural differences among the major areas of North America - and the continental perspective. Within this framework, it is appropriate for some products and services to be continent-wide and others to be specific to a district.
- 10.2 Each district may undertake programs that meet the specific needs and opportunities in particular areas of its district. The focus should be on programming that is at a larger scale than any one kehilla can mount or

afford (e.g., with a star teacher, scholar in residence, or artist) and furthers the focus on core functions of USCJ.

IV. Expand and redeploy financial resources

Over the next two to three years USCJ needs to:

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

11.0 USCJ should focus revenue expansion on financial resource development (FRD).

11.1 The key to expanding FRD is the development of a Board that includes significant philanthropic leadership.

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

11.3 The largest kehillot and their rabbis need to be actively involved in recruiting philanthropic leaders for the Board and in connecting USCJ with potential major philanthropic investors.

11.4 Particular emphasis needs to be given to connecting with the thousands of USY/USCJ program alumni as critical long term capital and human resources.

11.5 To achieve replicability and sustainability for many of its programs, where possible and appropriate, USCJ's philanthropic resources should be leveraged with local partners or other scholarship/donor sources.

11.6 To achieve most of its new program initiatives outlined in this Updated Strategic Plan, new philanthropy raised by USCJ will be required.

12.0 USCJ should develop a planned giving and endowment program for itself and for member kehillot.

13.0 USCJ should develop a plan to strategically monetize its real estate assets in New York and/or in Jerusalem to replenish certain cash

reserves and unlock the investment capital necessary to support the growth areas identified in this strategic plan.

14.0 USCJ should review non-core function business areas for mission congruence and cost benefit to determine their future place in the organization.

15.0 USCJ should change the dues formula, reduce dependency on kehilla dues as a percentage of USCJ's total revenues and as resources become available, and create an incentive program, perhaps through a dues grant or set aside program, for communal collaborations and partnerships.

16.0 USCJ should explore the possibility of developing new revenue centers, focusing on products and services above and beyond the membership package, that reduce USCJ's funding share of certain programs or create new revenue sources.

17.0 USCJ should continue to invest and improve operational efficiencies and metrics.

V. Israel Engagement and the Fuchsberg Jerusalem Center

18.0 The Fuchsberg Jerusalem Center should continue to implement the recommendations of the blue ribbon commission and become a wholly owned subsidiary of USCJ.

19.0 USCJ should expand its short term and long term Israel immersion experiences for teens, young adults, families and adults.

VI. Create and implement an integrated convention strategy

20.0 USCJ should make its conventions a centerpiece for showcasing its priorities and programs.

20.1 Conventions should be integrated into the overall operational and programmatic structure of USCJ.

20.2 Conventions should be designed and implemented as opportunities for sharing, networking and expertise for strategies and functions listed above.

20.3 Conventions should be international in scope and include a "broad tent" of all who are concerned about the vital religious center of Judaism for which Conservative Judaism is the anchor.

NEXT STEPS

1. USCJ Executive Committee discusses and approves strategic plan update. **February.**
2. Strategic plan update is incorporated into three year business and monetization plan. **February.**
3. USCJ Board of Directors discusses and approves strategic update, three year business and monetization plans. **March.**
4. FY2015 Budget will incorporate priorities in the Strategic and Business Plans for which resources are already available or committed. **March - June.**
5. With the Strategic and Business Plans in place, Senior Staff and Executive Committee will create a new three year implementation plan which includes prioritization as funds become available. **Summer 2014.**



Appendix: The Case for a New United Synagogue of Conservative Judaism (March 2011)

Two critical considerations undergird the case for a new USCJ: the necessity of a vital Conservative Jewish movement in American Judaism and the importance of having inspiring and well-functioning Conservative congregations;

Conservative Judaism

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

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

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

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

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

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

The absolute number of Conservative Jews in North America, and their “market share” of the congregationally affiliated Jewish population, has been declining since the 1960’s. The reasons are multiple. First, the number of non-Orthodox younger adult Jews - adults age 25-44 – is shrinking relative to those 55-74 in the American Jewish population. So too, the number of in-married young couples is shrinking, with commensurate growth in non-married and intermarried. Second, Conservative Jews

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

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

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

Conservative Congregations

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

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

Concerns for the future of Conservative congregations have been palpable and growing over the last decade. In a 2006 USCJ-sponsored survey of congregational leaders, almost all their volunteered comments expressed concerns and anxieties, while few were upbeat. Their concerns centered around four M's: Members, Money, Movement, and Meaning.

In a study conducted in mid-2010, as many as one quarter of Conservative congregational leaders report their congregations in serious financial difficulty; and another quarter report some difficulty.³ In contrast, five years ago, only 8% were in

³ FACT Study, 2010; computations performed by UAI.

serious financial difficulty. In 2010, only 9% of adult members of Conservative congregations are under 40. Only 13% of Conservative leaders report that their congregations experience “a lot” of rotation in leadership roles. Only 24% of Conservative leaders strongly agree that their congregation celebrates their denominational heritage.

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

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

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

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

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

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