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Long Range Planning Committee, 1985-1988.

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UAHC Long Range Planning Committee  
Draft Goals Statement

A VISION OF OUR FUTURE

As we look to the year 2000 and beyond, we do so with a vision of what we wish to become. Rooted in Jewish history, while cognizant of our role as the primary guarantors of a dynamic Jewish future that is responsive to social reality and human aspirations, the Union of American Hebrew Congregations herewith affirms its long range plan for giving substance to our dreams.

ENVISIONING THE IDEAL RELIGIOUS REFORM JEW

We begin with the individual Reform Jew, those men, women, and young people whose Jewish identity and active participation in our community will shape its essence. By the year 2000 and beyond, we will foster the emergence of a community of religious Reform Jews, literate, proud, self-confident, assertive and activist:

I.  
GOD

- \* Jews who share an awareness of God's presence in their lives, a sense of the sacred, the holy, the spiritual, as expressed through a sense of covenant ( B'rit ) between God and the Jewish people

II.  
REFORM  
JUDAISM

- \* Jews who affirm their Jewish identity and commitment most meaningfully through Reform Judaism, link themselves through Reform Judaism to the Jewish people in word and deed, and therefore build, strengthen, support, and participate in the life of the synagogue as the central institution of Jewish communal life

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III.  
STUDY

- \* Jews who study Torah, Jewish history, values, and ethical teachings, as means to the greater end of observance of those mitzvot consistent with our evolutionary history and the conscience of the individual

IV.  
PRAYER

- \* Jews who value and practice individual and communal prayer ( tefilah ) on a regular basis.

V.  
TIKKUN  
OLAM

- \* Jews who take personal responsibility for making our world better ( tikkun olam ) through individual and communal religious action -- the pursuit of justice, peace, equality, freedom; the advocacy of individual dignity and the value of human life; and acting upon their concern for the environment

VI.  
JEWISH  
VALUES

- \* Jews who reflect Jewish ethical and moral values in their business, family, and personal lives and who consistently advocate those same values on the national and international level

VII.  
JEWISH  
SERVICE

- \* Jews who embrace service to the Jewish people and Reform Judaism, whether lay or professional, as a personal responsibility

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VIII.

ISRAEL AND \*  
THE DIASPORA

Jews who though active in Diaspora life also affirm their historic bond to the land of Israel, recognize the unparalleled Jewish challenge and opportunity of the State of Israel, and work to strengthen the hands of fellow Jews seeking to build a pluralistic Jewish society in Israel based upon our highest Jewish values

IX.

JEWISH \*  
CELEBRATION

Jews for whom home and public Jewish celebrations and observances are central to the regular rhythm of their daily lives

X.

A WORLD \*  
FAMILY  
OF JEWS

Jews who actively seek the welfare of fellow Jews throughout the world, welcome them into the family of liberal Judaism, and envision a worldwide partnership of liberal, progressive, and Reform Jews



MINUTES

LONG RANGE PLANNING COMMITTEE

Dr. Robert Hess, Chairman

MEETING ONE

Atlanta, Georgia

November 20-21, 1988

ATTENDANCE: Dr. Robert Hess, Rabbi Jack Bemporad, Rabbi Howard Bogot, Donald Day, Stanley Loeb, Dr. Michael Meyer, Martin Robins, Michael Rukin, Geraldine Voit, Rabbi Leslie Gutterman, Dolores Wilkenfeld, Arthur Grant, Robert Koppel, Rabbi Alexander Schindler, Rabbi Daniel Syme, Rabbi Michael Zedek.

Sunday, November 20

The Chairman, Dr. Robert Hess, Called the meeting to order at 4:20 PM. Rabbi Howard Bogot delivered the D'var Torah.

Members of the group then introduced themselves in terms of their Jewish involvements and experience in long range planning.

Rabbi Alexander Schindler recalled the history of UAHC long range planning. This is the fourth such group. Each of the prior groups selected its own agenda without a specific charge. The role of this Committee is strategic planning, the development of specific goals and objectives for the future, the ascertaining of Board of Trustees assent, and the coordination of phases of implementation.

Dr. Hess emphasized that our process will be very different from those of the past, that we were about to begin a long range plan, and that we have no urgency for action.

After dinner, Dr. Hess led a discussion of strategic planning in the public, academic and private sectors.

1. Martin Robins described strategic planning in the public sector, specifically in terms of his personal experience in New Jersey with the Transportation Authority.

1. Development of Mission Statement
2. Situation Analysis - Environment - Discussion of funding, resources available.
3. Assessment of "Stakeholders" - Who needs to be involved, have needs addressed.
4. Identification of Threats - Such as builders.
5. Identification of Opportunities - How to establish network of supporters among stakeholders.
6. Goals
7. Objectives
8. Strategies

Mr. Robins pointed out that the UAHC is an extremely complex entity in terms of the relationships of stakeholders. Therefore, threats and opportunities are difficult to identify.

2. Dr. Hess described strategic planning in an academic environment. College enrollment today is exploding, expanding into all socio-economic, ethnic, racial and religious groups. Men and women now are roughly equal in their percentage of the population, majoring in professional realms as opposed to liberal arts. This stands in stark contrast to conditions in the 1920's and 1930's.

These and a number of other examples pointed to a dramatic change in the internal demographics of the college population.

In a like manner, Dr. Hess described the evolution of Brooklyn College, its many demographic changes from the 1960's through the 1980's, and the ways in which a strategic plan was implemented to shape the future.

Dr. Hess declared that the UAHC must assess its current and future demographics as part of developing a strategic plan.

Steps involved will include:

1. Understanding environment and opportunities.
2. Setting goals.
3. Developing options.
4. Making decisions based on history, strengths and opportunities.
5. Implementation and assessment of attainment.

Dr. Hess alluded to a section from the Machzor, which refers to God as a potter and humanity as clay. In a sense, the UAHC is like clay, its leaders like potters.

Our strategic plan will have three major steps:

1. Rational determination of where we are.
2. Vision of where we want to be.
3. Development of detailed design of where we want to be, and how to get there:
  - a. Action Plan
  - b. Specific Steps
  - c. Specific Assignments
  - d. Deadlines

Above all, ours will be a long-range plan, not merely 1-5 years.

The Brooklyn College Plan had five goals, objectives, schedules, deadlines and written reports, whose philosophy and structure now permeates the institution.

3. Michael Rukin described strategic planning as related to the



two-year Boston Federation experience:

1. Goal was to create a shared vision and sense of mission for the future.
2. Then compare with existing structures and history.
3. Federation study had task forces:
  - a. Governance
  - b. Agency conflict
  - c. Allocations.
4. Now in stage of implementation.
5. Dispelling myths was crucial.

Mr. Rukin urged that we pay careful attention to demography, population mobility, other factors usually ignored.

The meeting adjourned for the evening at 9:00 PM. In closing this session, Dr. Hess emphasized that change is dynamic. Changes occur at different times. Furthermore, all issues need not be addressed. That, too, is a strategic decision.

Monday, November 21

The meeting was called to order at 9:20 AM.

Rabbi Schindler suggested that many groups had to be consulted if the resulting product is to gain the support of the Movement as a whole:

1. UAHC officers, Executive Committee and Board.
2. Commissions and Departments.
3. UAHC staff as a whole.

He asked when the goals and objectives would be ready to be launched.

Dr. Hess ventured a projection of 1991.



Dr. Michael Meyer and Martin Robins suggested a more intensive initial process, with a ten to fifteen year vision.

Michael Rukin asked for a definition of the entity for whom we were defining a long-range plan--the UAHC alone, or the Reform Movement as a whole.

Rabbi Schindler urged that we develop a plan for the UAHC as defined as the Reform Jewish Community. If the plan is compelling, it will permeate all institutions of Reform.

Rabbi Gutterman urged careful attention to process and "ownership" by as many people as possible.

Donald Day stated his belief that the CCAR and HUC-JIR must have a role in this process if it is to touch the Movement as a whole. Further, he asked that we develop a Mission Statement, and study demographic data and sociological projections prior to developing goals and objectives.

Rabbi Bemporad underscored the importance of identifying stakeholders, but asked whether identification of values precedes strategies or vice-versa. Further, he asked for data on long range plans from other religious denominations, as well as a specification of the information we need to decide.

Other questions raised included:

1. Generating a vision before generating a plan,
2. How do we involve those not on the Committee in planning and ownership.

After an extensive discussion of process, Dr. Hess offered two possible goals, relating to spirituality and Jewish unity, as models for the sort of vision that would hold regardless of sociology.

Arthur Grant urged a second meeting prior to the Board Meeting in an informal setting, with "homework" of written and justified goals, shared

in writing, a la the "Delphi Method."

Michael Rukin suggested the use of telecommunications as a vehicle for conferencing.

DR. HESS'S PROPOSALS:

1. That we try to have a report for the 1991 Biennial, interim or final.
2. That such a plan cover 1991-2016.
3. That the report have both short (5-10 years) and long term goals.

These three items received unanimous assent of the group.

4. The next meeting will be in a retreat setting, prior to the May Board meeting.
5. Materials from UAHC Departments and Commissions as to goals short-term will be accumulated and stored at some point in time. Dr. Hess suggested that we need not define the values out of which our goals flow, that they will be implicit in the goals we embrace.
6. Our next session will be a brainstorming session, and take place in an informal setting from Saturday evening through Monday afternoon. Each of us is to send February, March and April calendars to Robert at the UAHC at once.

GENERAL DISCUSSION

Rabbi Bogot suggested that we share thoughts with each other on substance or process in an informal manner. He found particular excitement in Dr. Hess' notion of Judaism having a values impact on humanity.

Rabbi Gutterman urged that we not fall into what he called "the

paralysis of analysis." We need, he said, basic documents with a briefly stated snapshot of the environment.

The group then began a brainstorming session on goals, including:

1. Jewish Survival
2. Doubling of numbers
3. Strengthening growth of Jewish people
4. Enhancing numbers of Reform Jews
5. Impart knowledge, tools with which to act as Reform Jews
6. To help "Am Yisrael" become a holy people
7. Enhance feeling of Kedusha in individual Jew.
8. Streamlining UAHC in structure
9. Strengthening congregations and relation to UAHC
10. Strengthening influence of a Liberal Judaism integral to Judaism
11. Deepen Jewish identity among young people
12. Prepare Jewishly literate leadership
13. Strengthen synagogue
14. Foster unity of Jewish people without sacrificing uniqueness of Reform
15. Define boundaries of Reform
16. Define expectations of Reform living
17. Assert leadership in larger community as Reform Jews
18. Seek to create Tikkun Olam in a manner that reflects a Reform philosophy
19. Aggressive stance of Reform as an "Or La-goyim."
20. Financial continuity



21. Bring together Jews whose identity is primarily ethnic with those who identify primarily in a religious context.
22. Reestablish synagogue as primary locus of educational, religious, and social Jewish program.
23. Establish centrality of Reform Judaism within Judaism as a whole.
24. Structure synagogue so as to better make Reform Jews.

The meeting adjourned at 12:30 PM.





OUTLINE

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- A. The Federation of Our Movement.
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- C. Some Conclusions.

II. Five General Goals to Pursue for Increasing The Emphasis on and Improving, the Provision and Delivery of Services to Congregations.

- A. Processes of Consultation.
- B. The National and Regional Professional Structures.
- C. Processes of Communication.
- D. Restructuring The Programming Process.
- E. Revising The UAHC Budgetary Process.

III. Four More Specific Goals.

A. The UAHC Should Use and Impart Its Expertise in Helping to Develop Lay and Professional Leadership within The Congregation.

1. Lay Leadership.

- (a) Identification and Recruitment.
- (b) Training and Retention.

2. Religious Leadership.

3. Other Professional Leadership.

B. The UAHC Should Create and Implement A Financial Development Program to Provide Financial Information and Guidance to Congregations.

C. The UAHC Should Create Mechanisms for The Gathering, Analysis and Dissemination of Demographic Data Designed to Support Future Planning Efforts at National, Regional and Congregational Levels.

D. The UAHC Should Hold a Retreat for Key Staff, Trustees, and Congregational Representatives (Lay and Professional) to Discuss These Goals, to Discuss The Recommendations and Suggestions for Their Implementation, and to Formulate An Action Plan.

IV. Suggested Areas for Future Examination by The Committee.

V. Conclusion.

Appendices



LONG RANGE PLANNING COMMITTEE (1985-1987)

Allan B. Goldman, Leo Baeck Temple, Los Angeles, California,  
Chairman

Judith S. Ball, Temple Beth Ami, Rockville, Maryland

Myra Bluebond-Langner, Congregation Rodeph Shalom,  
Philadelphia, Pennsylvania

Richard F. Cohn, Baltimore Hebrew Congregation, Baltimore,  
Maryland

Laurence Deitch, Temple Beth El, Birmingham, Michigan

James J. Friedman, Isaac M. Wise Temple, Cincinnati, Ohio

Mark Hochberg, Congregation B'nai Jeshurun, Short Hills, New  
Jersey

Roberta Katz, Temple Beth Am, Seattle, Washington

Daniel Kirsch, Temple Emeth, Teaneck, New Jersey

Richard Krelstein, Holy Blossom Temple, Toronto, Canada

Carl Lee, Temple Emanu-el, Dallas, Texas

Lawrence Linkon, Temple Solomon, Centralia, Illinois

Steven Moise, Congregation Albert, Albuquerque, New Mexico

Cynthia Muscatel, Temple De Hirsch Sinai, Seattle, Washington

Carol Nemo, The Temple, Atlanta, Georgia

Michael Price, Temple Beth Tikvah, Madison, Connecticut

Larry Rickel, Congregation B'nai Jeshurun, Short Hills, New  
Jersey

Martin Robins, Temple Emanu-el, Westfield, New Jersey

Russell Silverman, Temple Judea, Coral Gables, Florida

Roger Tilles, Temple Beth El, Great Neck, New York

Rabbi Lennard R. Thal, Los Angeles, California, Staff  
Director



## SUMMARY OF SHORT AND LONG RANGE GOALS

### RECOMMENDED BY THE COMMITTEE

The Long Range Planning Committee Recommends that the  
UAHC:

1. Establish on-going processes of consultation with all constituent congregations, using regional leadership (lay and professional) to ascertain the evolving program and service needs of the congregations and to assist the UAHC in imparting its programs, services and visions to the congregations.
2. Examine, and revise as needed, the UAHC professional structure, nationally and regionally.
3. Continue to study and revise the process by which the UAHC communicates with the congregations and their members.
4. Restructure the UAHC programming process to ensure that support for the development of a particular program is broadly based and the program responds to the changing demographics and needs of the North American Reform Jewish community.
5. Revise the UAHC budgetary process to align its resources with its strategic objectives.
6. Use and impart its expertise in helping to develop lay and professional leadership within the congregation.
7. Create and implement a financial development program to provide financial information and guidance to congregations.
8. Create mechanisms for the gathering, analysis and



dissemination of demographic data designed to support future planning efforts at national, regional and congregational levels.

9. Hold a retreat for key staff, trustees and congregational representatives (lay and professional) to discuss these goals, to discuss the recommendations and suggestions for their implementation, and to formulate an action plan.



## I

### Introduction

#### A. The Federation of Our Movement

Reform Judaism in North America is a complex religious federation that has many elements. Among these are 1,500,000 Reform Jews, more than 800 congregations that belong to the Union of American Hebrew Congregations, the Hebrew Union College - Jewish Institute of Religion, the Central Conference of American Rabbis, the American Conference of Cantors, and the UAHC organization itself (including affiliates such as NFTS, NFTB, NATE, NATA and ARZA).

This federation is geographically dispersed, and it serves a variety of regional cultures and congregations that represent a significant diversity in size, experience, maturity and approach to Reform Judaism. For our federation, the Reform Jewish Movement, to function effectively, a shared vision of the mission and methods of each of its components and a commitment of each component to listen to and communicate with the others must exist.

The UAHC faces a most challenging task. Among its objectives have been the development and delivery of programs and the satisfaction of congregational needs with services. Its programs and services impact all areas of the lives of the members of Reform congregations. Because of the strong leadership which has guided the UAHC during the past 40 years, the level of expectation in our congregations as to what they should be receiving from the UAHC in programs and services has

increased commensurately. In Appendix A we have quoted Article II of the UAHC Constitution which describes the "Objects" of the Union. In Appendix B we have listed various commissions, committees, task forces and other entities, as well as various UAHC programming departments and recent publications as examples of the breadth of activity in which the UAHC is engaged.





B. The Long Range Planning Committee.

The General Assembly at the Houston Biennial in November, 1983 resolved that the Long Range Planning Committee, which had previously reported to each Biennial, should be "established as a committee of the Union and its members appointed both by the Chairman of the Board and by the regions." This resolution had the unanimous approval of the committee and the professional staff of the UAHC, because of a desire that the work of the committee be communicated to and be responsive to the UAHC Board of Trustees as well as to the Biennial. Thereafter, the Chairman and President of the Union believed that it would be beneficial to our Movement and to the process of identification and development of new leaders at the regional and national levels if the members of the committee were young, committed Reform Jews who had been involved in their congregations or in NFTY but who had not been involved with the UAHC itself. The goal was that Jewish leaders in their 30's and 40's would bring an independent approach and offer a new perspective on UAHC strategic and long range planning as they looked at our past, examined our present, and made recommendations for our future.

During 1984 the new Chairman of the committee (the only holdover from the previously constituted committee), in conjunction with Rabbi Lennard R. Thal, who became the new staff director of the committee, assembled names of potential committee members from a variety of sources, including national and regional UAHC staff, national and regional lay leaders, and some congregational rabbis and other professionals. Seventy-five



percent (75%) of those invited to join the committee accepted. Since April, 1985 the committee has met six times in two-day sessions in Washington, White Plains, Los Angeles, Dallas, New York City, and Atlanta. Attendance at virtually all of our meetings has been excellent. An important factor in what the committee believes has been its camaraderie and success is the full participation of the spouses of committee members; they are not listed on the back of the front cover but they participated most significantly in our examinations, in our oral and written analyses, in our deliberations, and in our decisions and recommendations.

The committee studied the operation of the UAHC; interviewed lay and professional leaders at the national and regional UAHC levels, at small, medium and large congregations, and at HUC-JIR; and examined representative UAHC programs, their development and their delivery. Members of the committee live all over North America, and our interviews have ranged from north to south, east to west, city to rural, urban to suburban, and vibrant to struggling congregations. We have listened to and questioned futurists, sociologists, demographers, planners and UAHC lay and professional programmers. Our mission has been to identify the fundamental issues which our Reform congregations and our Union must address.

C. Some Conclusions.

All aspects of UAHC and congregational programming and services should be examined in the light of a fundamental principle: the congregation is the central institution of Jewish life, and the purpose of the congregation is to be a house of worship, study and fellowship. Reform Jews want their congregations to be centers of spirituality, commitment, education, caring, warmth and love. The allocation of resources by the UAHC and the congregations must be determined in light of this principle, and "success" must be judged by how close our institutions come to achievement of this principle.

The UAHC, faced with an ever-changing environment, has been alert, creative and productive. The 1985 national Biennial agenda illustrates a concentration upon and profusion of programmatic initiatives in areas such as Outreach, Religious Action, Caring Community, Camps, Progressive Judaism in Israel, the New Educational Curriculum, Parenting Centers, College Youth, Response to Cults and Missionaries, Worship and Religious Commitment.

It is a great challenge to develop and provide programs and services to meet the needs of congregations which are geographically dispersed, increasing in number, and varied in interests, organizational maturity, administrative self-sufficiency and financial health. Through their dues our congregations provide the bulwark of financial support to the UAHC, and their members are potential benefactors of the various institutions of our Movement. These dues should finance UAHC



programs and services which are vital to the future success of the congregations themselves. Yet, in spite of the many successes which the UAHC programs have enjoyed, the fact is that not enough of our congregations view the delivery of the programs and services to them as successful. Many congregations and their members do not know what services they can and do obtain from the Union. Many congregations and their leaders who do know what services are provided, complain that when sought the services are either unavailable or not helpful. Either perception becomes reality for the perceiver, or perception and reality are one. Many of the goals recommended in this Report address this perception and this reality.

In order to strengthen our Movement and to forge a shared vision of its future, close consultation between the UAHC and its congregations and among the UAHC and the other constituent members of the federation is essential. The Union must be made aware of the specific needs of each congregation, and each congregation and its Rabbi must be made aware of the programs and services which the Union provides. Through this consultative relationship, current programs and creative new ones, as well as the many and varied UAHC services, must be examined and ranked in priority to determine what is most needed and what will be the most effective in serving the Movement's future needs. When subjected to this close, cooperative scrutiny, we may find that some elements of UAHC programs, services and operations (as presently constituted) do not meet the needs of the congregations, or met old needs that have



passed. As described in Paragraph II D of this Report, the committee strongly believes that all programs implemented on a national basis should contain a specific "sunset" review provision. Realignment of budget allocations to match resources with strategic objectives will provide funds for the high priority items, engender communal good will and satisfaction arising from a responsiveness to the needs, and help to foster the development of new funding sources.

Moreover, the UAHC must strengthen its ability to provide services to the congregations. It should institutionalize demographic studies of its actual and potential membership, concentrate professional staff attention on the delivery and communication of these services, expand the role and resources of the regional offices, and attract the best possible Regional Directors (the people on the point performing and supervising the critical delivery of program and service to the congregations) by investing an appropriate percentage of financial resources in the regional structure. Given the high standards which our congregations expect, great effort should be made to ensure the future appeal of the position of Regional Director, so that the Union leadership can be confident that openings will be attractive to well-qualified individuals.

Our committee firmly believes and wishes to convey that there is an urgency in addressing and accomplishing the short and long range goals which we have previously summarized and which we discuss in this Report. Although the goals are numbered, the committee has not prioritized them. We believe that

prioritization should be a joint effort of the UAHC Board of Trustees, and its lay and professional leadership, in conjunction with representatives from the congregations.

The demographic data confirms the present strength of our Movement in North America and the increased strength which future affiliation will bring. Achievement of our recommended goals will enable the UAHC, our congregations and our Reform Movement to serve our growing constituency actively and well.



## II

### Five General Goals to Pursue for Increasing The Emphasis on, and Improving, The Provision and Delivery of Services to Congregations

1. Establish ongoing processes of consultation with all constituent congregations, using regional leadership (lay and professional) to ascertain the evolving program and service needs of the congregations and to assist the UAHC in imparting its programs, services and visions to the congregations.
2. Examine, and revise as needed, the UAHC professional structure, nationally and regionally.
3. Continue to study and revise the process by which the UAHC communicates with the congregations and their members.
4. Restructure the UAHC programming process to ensure that support for the development of a particular program is broadly based and the program responds to the changing demographics and needs of the North American Reform Jewish community.
5. Revise the UAHC budgetary process to align its resources with its strategic objectives.



A. Processes of Consultation.

There are already a number of mechanisms in place, nationally and regionally, which should enable the Union to ascertain the congregations' needs and to deliver directly to the congregations those programs and services which meet these needs. After all, that is one of the principal purposes of the entire regional apparatus. Regional biennials, the congregational liaison program utilized by several regions, the Conference of Presidents of Large Congregations, and the Temple Administration Assistance Program of the UAHC's Department of Synagogue Management and the National Association of Temple Administrators (NATA) are among the many methods of conducting a continuing process of consultation.

Unfortunately, our examination has shown that though all of these and other methods are in effect, they are not currently working well enough to achieve the purpose of fully ascertaining the congregations' needs. Many factors may have contributed to the problem. The regular -- and, at times, too rapid -- turnover of congregational leadership not only reflects diverse expectations of what is needed from the UAHC, but also requires a massive and time-consuming effort of re-education by regional staff and lay leaders. Indeed, as is noted elsewhere in this report, the regional structure and priorities may need to be reconsidered to take this critically important goal into account more fully. More sophisticated and wideranging liaison work by regional lay leaders is a must. Further, regional leaders need to acknowledge not only the impact of everchanging congregational

leadership on the process of consultation but also the fact that many synagogue professionals may fail to give the UAHC appropriate credit for national or regional programs they have introduced in their congregations. The UAHC also must avoid, in its eagerness to be responsive, the creation of impressions and/or expectations that it can solve every congregational problem; at times, it can only provide encouragement, perspective and assistance in analyzing different strategies. In short, there are certain realities that may encumber the processes of consultation and relationship-building that should be acknowledged and then sensitively handled.

In its recent pioneering Future Planning Report, after an in-depth written and oral survey of its congregations, the Northeast Council of the UAHC concluded that one of the most frequent criticisms of the Union was "insufficient personal contact from Northeast Council leadership and staff" (and this in a region generally acknowledged to be one of the most effective within the UAHC). This regional finding mirrors a criticism which we found nationally. The UAHC must make a greater effort to convey to our congregations the close "connection" that exists. There is no adversarial "we-they" relationship, but a relationship in which Union and congregation are inextricably intertwined and in which the emphasis is on trust, listening, mutual support, and "win-win" situations. After all, the UAHC is designed to, and intends to reflect, the needs and desires of its constituents and is not intended to be an entity unto itself.



The retreat which we have strongly recommended as Goal 9 would be a broad national first step in addressing this and all of the other Goals which we have recommended. But it must be viewed as only the beginning. Without attempting to impose our suggestions on those who will be convening at a retreat, might not the following post-retreat scenario be helpful: Regional lay leaders could meet with (or at least converse by telephone with) leaders of each congregation of the region no less than every other month, to ascertain from the lay perspective what are the successes, problems and needs in each congregation. Regional Directors also could do this with professionals within each congregation on an even more frequent basis. Periodic reports -- using forms that Regional Directors would not perceive as unduly time-consuming -- summarizing the needs, problems, and successes as described by the congregations would then flow from the Regional Director to a national staff member. The national staff member would collate this information, identifying patterns, trends and trouble spots, and share a summary with appropriate national and regional staff. In fact, we view this process -- or something akin to it -- to be of such importance that we would further recommend that a high-ranking national staff member be in charge of congregational services and communications and that this person's principal activity be the continual implementation of such duties.



B. The National and Regional Professional Structures.

The Union should periodically ask itself: are we presently organized to meet the everyday needs of the congregations and to communicate effectively with the congregations? In the preceding section we suggested a new, important national staff position. However, we want to emphasize that an important existing position, Director of Synagogue Management, and the department headed by that Director, require a great deal of attention.

The most critical need expressed by the congregations in the Northeast Council was a plea for "more and better advice on fundraising, expense management, and planning for future growth and maintenance." These same needs have been expressed by congregational leaders around North America and at meetings of representatives of the large congregations. It is imperative that the Union fulfill these needs, and that if necessary resources be re-directed to achieve this. Through its Department of Synagogue Management the UAHC, among many other things, has issued an excellent Manual for temple administrators, developed computer software for congregational administrative tasks, and compiled a library of architects and designers for congregations involved in major construction or renovation. Yet the perception is that the needs of the congregations are not being met and the reality is that the needs of our congregations today require a much broader array of management aids. The specific aids can quickly be identified through the consultative process we have previously suggested; the UAHC is ideally positioned and suited,

through its Department of Synagogue Management, to engage in the development and distribution of these aids. In addition, the Director of this Department should have the same prestige and status as other top members of the national staff.

As we have previously said, the Regional Director and the regional staff (along with regional lay leadership) should be acknowledged by all concerned as the principal component in the delivery of programs and services to our congregations. The Union must continue to recruit the most creative and energetic individuals for the regional and national staffs, and the compensation must be commensurate with the importance of the position. The regional staff must represent intelligence, credibility and responsiveness to the congregations, and must have the capability to build lasting bridges between the Union and the congregations and their rabbis. While each regional staff member has his or her own strengths, there is a perception that present performance may vary widely. There is also the reality that in recognition of the central role which the regions play, resources should be re-directed to the regions for the purpose of enhancing regional staffs and programming. At the same time, regional staff must know how to motivate, train, and deploy regional lay leaders in executing the program and service delivery expected of the region. The more that competent people can be enlisted in this effort, the more likely we are to succeed. (See Goal #6.)

Other suggestions regarding regional structure are:

1. All regional offices should employ the same basic



personnel with modifications based on the geographic size and population distribution and concentrations of the region. This will require budgetary allocations which properly fund the positions together with the support services which are entailed.

2. Create a new regional staff position specializing in general program development and congregational communication. This person would provide congregations with programming on topics of regional interest, and would coordinate frequent and scheduled meetings of congregational leaders to exchange ideas, problems and successes under UAHC auspices.

3. Implement this expansion of regional contact and service initially as a model program in one region, just as "The Times and The Seasons" program in Outreach was modelled and tested before it was publicized as generally available.

4. Appoint a national Regional Evaluation Committee which would evaluate each regional structure and how each region performs in effectively implementing the delivery of programs and services to the congregations. Similar committees could be established in each region. These committees would focus on expected outcomes, actual outcomes, and how well the structure accomplishes the objectives. The evaluation of personnel would be left to the appropriate national staff members.

5. Develop formal and consistent means of evaluating the effectiveness of Regional Directors. Care must be taken to anticipate and identify stagnation, exhaustion and "burn-out." Professional development programs ought to be recognized as potential antidotes to such problems.



6. Address the dilemma posed by the reality that too much already may be expected of regional directors but that many, most or all may need periodic or regular national responsibilities to remain fresh, challenged and interested in their work.

7. Encourage the establishment of subregional associations for mutual support and more effective communication of programming.

8. Establish a liaison system utilizing regional lay leadership making periodic calls on congregations to establish and maintain continuing dialogue between Region and Congregation, particularly in view of the ever-changing congregational leadership, as some regions have already done (see previous section).

9. All the Regional Directors and certain national staff should engage in a bi-monthly telephonic conference so that all are current on key regional and national developments, programs and problem areas.

10. Place more emphasis on public relations to accentuate and appropriately call to the attention of congregational leadership all that is being done well.

### C. Processes of Communication.

The UAHC recently has initiated procedures to study and revise the process by which it communicates with the congregations and their members. The Communications Committee has developed and sent to all Congregational Presidents a fund raising manual; it conducted a seminar in June, 1987 for the national staff, part of which was devoted to communicating to the staff comments the committee has received from the congregations; it had an ombudsman booth at the 1987 National Biennial; it has planned a series of brief bulletins to the congregations about the programs and services of the Union, and is developing other methods to educate our congregations about UAHC programs and services; and it has proposed that Congregational Presidents be invited to attend UAHC Board of Trustee meetings on a rotating basis. Our committee believes that each of these new efforts is worthwhile and important. Further, when resource people do visit the congregations, it should be emphasized that they have been sent by the UAHC so that those attending are clear about the source of assistance.

Our recommendation, that this study and revision of UAHC methods of communication continue, is designed to highlight the importance of this goal in building and maintaining the bridges and close connections between the UAHC and its congregations. The Northeast Council's Report found that among the most frequent criticisms of UAHC services were "too much mail" and "an inadequate explanation of what services the congregations were receiving." This again echoed the national findings of our



committee. A frequent comment made to us was that the Union should deliver less paper and more people -- that it should provide services, know how and inspiration by sending national and regional staff members into the field more frequently and in greater number, rather than emphasizing written materials which are under-read and under-utilized. Further, when resource people do visit the congregations, it should be emphasized that they have been sent by the UAHC so that those attending are clear about the source of assistance.

In discussing the processes of consultation in Section II A, we have suggested a procedure whereby important information about specific congregations can flow to the UAHC national staff through the regional directors, and we have suggested that a high-ranking staff member supervise congregational services and communications at the national level. These professional staff activities would supplement and complement lay leadership activities such as those conducted by the Communications Committee, the Chairman's Speakers Bureau, and regional lay leaders who could act as liaisons with the congregations. Three additional suggestions that should be considered are: (a) The development at both the national and regional offices of a weekly or twice a month mailing system, so that a congregation or household will receive all communications during that period in one packet of mail; (b) The designation by each congregation of the name and address of one member who would be the congregation's recipient of all UAHC national and regional mailings, who would be responsible for delivering the



communications to the appropriate lay and staff members of the congregation, who would give reports on UAHC programs and services at board meetings, and who would be acknowledged appropriately by the congregation and the Union for the service thereby rendered; and (c) The creation of procedures which would ensure improved communications by the congregations to the UAHC of the names and addresses of new congregational officers and board members.

Other suggestions regarding the communications process are:

1. There should be one Board member in every congregation designated as the "UAHC representative" for liaison and communications purposes. Each region and subregion should have periodic meetings of these UAHC representatives.

2. Establish a "hot-line" so that congregations give and obtain information to and from each other. Finances permitting, there could be regional hot-lines and national hot-lines for small, medium and large size congregations.

3. Although we recognize that two studies have occurred in the past 14 years, we believe that it is time once again to consider changing the UAHC's name. Many constituents no longer feel the need to belong to a "union" while many of our leaders would be reluctant to eliminate the one word which, for decades, has served as an informal but easily recognized "abbreviation" for the organization. In any case, it is time to reconsider the matter with an eye toward an alternative that would reflect that we are Reform and would indicate what we do.

4. Change the name of "Reform Judaism" magazine to include the name of our organization in big bold letters. It could be called "UAHC News" if we retain our current name. We should provide congregants who now ask "What's the UAHC?" with a constant response together with a visible means of identification.

5. Send a monthly, "camera ready" single page (front and back) newsletter to the congregations. It could be titled "What's Happening at the UAHC?" With only a slight increase in cost, congregations could send this to the printer with the other material that comprises the monthly "Bulletin," and the printer could fold this into the Bulletin. This should increase the Union's visibility to each congregant and thereby increase everyone's consciousness of being part of a Reform "Movement."

6. Develop a letter or brochure describing the UAHC, to be given to every new member upon joining a UAHC congregation.

7. Encourage congregations to display the UAHC logo on their letters and in their bulletins.



D. Restructuring The Programming Process.

In developing new programs and evaluating old ones, the UAHC always has attempted to address congregant and congregational needs, ever mindful that planning or programming efforts created in a vacuum are the antithesis of that goal. We have recommended in Section II A that through processes of consultation the UAHC expand the involvement of congregations in the identification of needs; such expanded involvement also should occur in the process of development of programs. This statement should not be construed as a suggestion that fewer programs should stem from the visionary and spiritual leadership with which the Union has been blessed for decades. Indeed, we recognize that it is the desire to be exposed firsthand to -- and to be associated with -- that visionary leadership that attracts many of our finest laity to serve as Trustees. In short, the Union is -- and must be -- more than simply an instrumentality of service delivery.

Nonetheless, even in those instances where the UAHC commences program development based upon identification of needs that do not arise from discussions with the congregations (for example, programs in response to demographic information, programs relating to rights of Reform Jews in Israel, or programs relating to a variety of national and international issues in the arena of social action), we recommend that prior to finalization, the proposed program include input from the regional lay and professional leadership and from a representative cross-section of congregations. Successful implementation and financial



support of all programs are more likely when congregations are involved and invested in the development process. The commitment of individual congregants to our Movement should thereby increase greatly.

Moreover, during development and prior to finalization of a program, the UAHC must be assured that it will receive funding adequate for implementation. Inadequately funded programs will be frustrating, ineffective and under-utilized at best and "sit on the shelf" at worst. As an example, our research indicated that the new religious school curriculum would be more effective and in wider use if from the outset, or even now, more resources were allocated to training sessions in all regions and in all major metropolitan areas; to providing congregational role models on how the curriculum can be used; and to funding Educational Consultants in all regions to work with congregations in its implementation. The Union's justifiable pride in the new curriculum then could be shared by our entire constituency.

As often as it is feasible, we recommend that a model of the program that has been developed be tested, as the UAHC did in developing "The Times and The Seasons" program in Outreach. Test results should stimulate whatever revisions may be necessary and should provide substantive input into the national implementation phase of the program.

We have not made specific suggestions with respect to the priority of program issues we have identified. That task will be left to those who develop and implement the programs.

The committee believes, and cannot recommend too strongly, that all programs implemented on a national basis should contain a specific "sunset" review provision. The pre-sunset length of the program would be determined by the UAHC Board of Trustees, in consultation with the professional staff and with the committee that has developed the program, and the program could be renewed (for another pre-determined period of time) only after the Board has thoroughly reviewed it to determine whether it should be continued as is, be continued in a modified fashion, or be eliminated. Having said that, we acknowledge that the system of giving tenure to staff members after a number of years of effective service -- a system which we do not challenge -- may create some complications in implementing a sunset provision in the programming process. We suggest that this be examined carefully so that the idea underlying the sunset program concept be realized without jeopardizing personnel policies currently in place.

Other suggestions regarding the programming process are:

1. Programmatic or service-oriented suggestions which may not be feasible when presented should be "stored" and periodically retrieved and examined to see if the time is more appropriate for development.

2. If it is not feasible to develop a congregation-suggested program or service at the national level, but several congregations express the same request, then the UAHC should facilitate a meeting among these congregations.



3. During the process of UAHC development of a program or service which initially emanated from the expression of an idea or need by a congregation, prior to finalization there should be input from the regional lay and professional leadership and from a representative cross-section of the congregations.

4. Once a program is developed and implementation occurs, there must be a periodic assessment or evaluation. This would include reports on its acceptability, the ease or difficulty of implementation, and an analysis of its impact. The initial evaluation should be made by the lay and professional leadership in each region and delivered to the national staff. The appropriate national committee in conjunction with the national staff should study the evaluations and make revisions in the program where appropriate.

5. Inevitably programs become stale in their current form and require a fresh approach; in other cases programs may no longer be valid, appropriate or financially feasible. The Union should be able to identify these instances through this evaluation process. Withdrawal of programs that are no longer appropriate may release funding for programs then considered essential. Our "sunset"-of-programs recommendation will be another method of evaluation of programs and allocation of financial resources to those programs that are most needed, most meaningful and most relevant. Notwithstanding the above, we recognize that some new programs lend themselves somewhat better than others to the processes of consultation, testing and review. We are not suggesting the adoption of a process that is to be so



process that is to be so rigid, mechanistic or formulaic that we overlook the reality that a corporate model simply does not apply to every program undertaken by a religious institution. Our goal here is not to hinder the Union but to devise an approach that, most often, will be useful and tend to ensure the acceptance and success of its programs.

Finally, our discussions with sociologists and demographers, such as Professors Stephen Cohen and Bruce Phillips, point to areas where congregations should focus their programming, perhaps in non-traditional ways. Our investigation and analysis led to our conclusion that the following areas need immediate attention:

- (a) Single parent families.
- (b) Issues of intermarriage, which are not being addressed (e.g. attendance at religious school; non-Jews as Congregational leaders).
- (c) The aging of our community.
- (d) The prolonged "singlehood" of increasing numbers of Jews.
- (e) Problems of geographic distribution among our community.
- (f) Attracting the unaffiliated.
- (g) Increased focus on education.
- (h) Attracting youth.
- (i) The changing role of women.
- (j) The phenomenon of delayed child bearing.

E. Revising The UAHC Budgetary Process.

Our study has led us to conclude that the Union's annual budget is very lean and that it has been difficult for the Union to raise discretionary funds. Our conclusion coincides with a similar perception on this subject held by the lay and professional leadership of the UAHC. We have found that in the UAHC, as in most non-profit organizations where significant discretionary funds are not available, the tendency is to keep the budget allocation percentages roughly the same from year to year while seeking earmarked gifts to fund new program initiatives.

In other sections of this Report we have made recommendations which, if implemented, would have a significant effect on the Union's budget and the budgetary process. A prioritization of programs and services would necessitate the reallocation of budget allocations to align resources with strategic objectives. We believe that as the matching of congregational needs with UAHC program and services increases (through the consultation process, the strengthening of the regional professional structure, the enhancement of the communications process, the restructuring of the programming process, creation of new methods of leadership and financial development, etc.), the ability of the Union to raise discretionary funds will increase. In addition, implementation of "sunset" provisions (see previous section) with respect to programs and services could yield substantial funds for reallocation to meet more pressing needs.



Further, we anticipate that such steps will convey a very potent message to the congregations: that the UAHC is responsive to its constituents. We think that message can have a very positive impact on the attitude of congregational leadership relative to MUM. Even if the financial resources remained the same, implementation of our recommendations for a high-ranking national staff member in charge of congregational services and communications, enhanced compensation for the Director of Synagogue Management and the Regional Directors, increase in the size of the regional staff, development of demographic data gathering mechanisms, and implementation of some of our suggestions would necessitate a significant revision of the budget.

We recommend that in preparing the budget for fiscal 1988-89, the national staff, the Budget Committee and the Board of Trustees attempt an extensive experiment with the budget process, by:

1. Developing a set of strategic goals and objectives for the next five years in consultation with representatives of the regions and the congregations, with some consideration given to the Report of this Committee;
2. Asking each program officer to describe his or her budget request in a manner which identifies how that allocation satisfies the Union's goals and objectives;
3. Conducting an internal debate about the priority of various programs and services in meeting the Union's strategic goals and objectives; and

4. Insofar as it is possible (contractually or otherwise), reallocating budgeted resources to favor those programs and services that can be demonstrated as having priority in meeting the Union's goals and objectives.

These recommendations would obviously change if, prior to the commencement of the 1988-89 budget process, the Union were to develop its strategic goals and objectives and prioritize programs and services by a different method (for example, through retreats and/or the consultative process).

This Report reflects the Committee's optimism that implementation of the stated Goals will generate the non-discretionary and discretionary annual funds to effectuate all of the Union's programs and services. However, we should not overlook the necessity of building an Endowment for the UAHC. Several years ago the Union embarked upon a program to build a \$20,000,000 endowment through the solicitation of restricted and unrestricted gifts. Although considerable time and effort was devoted to that program and the Union utilized the services of a prominent fund-raising organization, the results fell far short of the goal. A substantial permanent endowment of unrestricted funds and a practice of continued giving for this purpose are matters to which the leadership of our Movement should give close attention. Restricted giving for earmarked programs (particularly those which are not assigned high priority in the consultative process) diverts organizational creativity from the central fund-raising efforts (Endowment, MUM, Fund for Reform Judaism), may direct the monies to programs that are not sufficiently



matured to use them effectively, and encourages the unfortunate and erroneous notion that sporadic giving shapes the agenda of the Union. From the interplay of mutual commitment between the Union and our congregations we should be able to shape an effective endowment program that will have the active participation of the local, regional and national leaders of our Movement. An endowment program, developed in accordance with the consultative process that we have previously described, should begin as soon as the Union has achieved success in implementing the goals addressed in this Report and enhanced its profile as an excellent provider of programs and services to our congregations.

In the meantime and as part of the budget priority-setting process that we have recommended, we also recommend that the Union's lay and professional leadership study the amount of time and money devoted to the Reform Jewish Appeal, Fund for Reform Judaism and restricted gifts programs. If the study determines that the time and money spent each year are commensurate with the income from a particular program, that program should continue. If the study finds no commensurate relationship between efforts and results, consideration should be given to modifying or terminating the program. If the study determines that a modified or new program could generate significant additional income, then the study should recommend its adoption and methods for its implementation. In sum, we envision a working Budget Committee that meets more than once a year, with subcommittees that consider the multitude of areas that must be addressed.

### III

#### Four More Specific Goals

6. Use and impart UAHC expertise in helping to develop lay and professional leadership within the congregation.

7. Create and implement a financial development program to provide financial information and guidance to congregations.

8. Create mechanisms for the gathering, analysis and dissemination of demographic data to support future planning efforts at both regional and congregational levels.

9. Hold a retreat for key staff, trustees and congregational representatives (lay and professional) to discuss these goals, to discuss the recommendations and suggestions for their implementation, and to formulate an action plan.

A. The UAHC Should Use and Impart Its Expertise in Helping to Develop Lay and Professional Leadership within The Congregation.

This goal, and the goals which follow relating to financial development, demographic gathering and analysis, and a retreat all relate to providing and delivering services to the congregations. However, these goals relate to more specific services than those we have previously discussed in this report, and we believe that such specificity requires separate treatment.

In order for congregations to fulfill their mission, they must have good leadership -- leaders who are knowledgeable, caring and committed Reform Jews. Our research has established



that the identification, recruitment, training and retention of such leaders, lay and professional, is one of the greatest long-range challenges facing our Movement.

1. Lay Leadership

Rarely do our congregations conduct effective leadership development programs for lay members. Many organizations, Jewish and secular, compete for the time and energy of potential leaders. In every Jewish community that we examined, Federations and other secular Jewish organizations are winning this competition. With the UAHC's help our congregations must develop programs to identify, inspire, train and retain dedicated lay leaders. Moreover, our lay leaders should emphasize their congregation and UAHC affiliations when they participate in Federation and other Jewish organizational activities, and they should underscore the role of the congregation as the central institution of Jewish life.

(a) Identification and Recruitment.

Congregations must develop criteria for identifying potential leaders. As one congregational president asked: "Who do we look for -- those with administrative skills, religious knowledge, money, or money-raising aptitude?" Methods must be developed to change a reactive selection process into a proactive identification process. Although the UAHC has a Leadership Development Committee, publishes some materials on the subject, and encourages Regional Directors and regional lay leaders to consult with congregations, it is clear from our discussions with the congregations that much more must be done.

It is essential that the Union develop detailed programs to assist the congregations in formulating their identification criteria.

The same is true for recruitment. Having identified the potential future leadership, the congregation must be armed with information, methods and strategies to enable it to win the recruitment competition. Should congregational officers and professionals convene periodic recruitment meetings of identified candidates, or establish a congregational Young Leadership Cabinet? How might incumbent leaders effectively convey the satisfaction they have had? Should we make every effort to "glamorize" temple leadership positions through "missions" (imitating the Federations), publicizing the "success stories" (focusing on the rewards inherent in the work or the possibilities of regional and national positions), and ensuring that there will be opportunities to assume real responsibility and authority?

Here the Union's help, on a national and regional level, can be of paramount importance. Nationally, with its finger on the pulse of over 800 congregations, it has the ability to accumulate data as to which methods and strategies are successful and which are not. It can publish these successes and failures as models of what to do and what not to do. It can draw on the expertise of its Leadership Development Committee and develop new methods and strategies (again perhaps testing these first as models) to meet the economic, social and other demographic trends. Regionally, the Regional Director and the



regional lay leadership can achieve on a more modest scale what we envision the UAHC achieving nationally. These individuals should know what has succeeded and failed in congregations in their region, and of course they will be the prime source of delivery to the congregations of the advice and expertise generated from the national office. It is instructive that the UAHC Leadership Development program geared to training and retention (referred to in the next section) was the concept of a regional president and was initially developed as a program in that region.

(b) Training and Retention.

An effective training program, one that is publicized widely within the congregation, can reap large dividends. It will attract those with leadership potential and it will help retain identified and/or active leaders. We cannot emphasize too much that potential board members must know the criteria for their selection and what will be expected of them before they are asked to serve. Board members must learn various aspects of the congregation's operations and either subscribe to the congregation's mission or assist in redefining it.

Many Regional Directors encourage congregations to invite them to conduct leadership training seminars for their Board in evening, all-day or even weekend retreat sessions. Another excellent step has been the formulation and implementation of the UAHC Leadership Development Program. Those involved in the program have developed a manual for those congregations that either have not benefited from the in-person

seminars conducted by trained facilitators under that program or wish to continue and expand their in-house training after participating in the program. These efforts should not only continue but should grow. UAHC lay and professional leadership should journey into the field in increasing numbers to educate and inspire congregational boards and other leadership groups. In examining its structure and redirecting its resources we recommend that the Union seriously consider creating a full-time national staff position for a person trained in organizational development who addresses (among other things) the issues of identification, recruitment, training and retention of congregational leaders.

Further, once identified and trained, the leaders must be retained. Some will continue out of a sense of obligation. Preferably, they will stay because they feel that they are doing something of value, that the worth of their contributions of ideas, time, energy and money is being reaffirmed regularly by the rabbi, the president and anyone else in a position to give credible "strokes." This also means that the leaders' educational and spiritual needs must be addressed during their period of service. The rabbi should see this as an area of high priority and allocate appropriate time and programming toward the "care and feeding" of the congregation's lay leadership.

Moreover, identification and development of UAHC Regional lay leaders should not be overlooked. This process should be much more formalized than it is today; the UAHC Leadership Development Committee, in conjunction with



representatives of the regions and the Regional Directors, should prepare guidelines and define the qualifications. In addition to individuals identified by regional officers and the Regional Director, close contact should take place with each congregation to obtain its recommendations taking care not to lure people away from the congregation prematurely. Training seminars should be conducted. Just as a focal point of the formation of our committee was the identification, recruitment, training and retention of news leaders, we strongly recommend that a similar new leadership group be formed in each region.

Our congregations want and need leaders who are not only good business people, not only sound managers, and not only caring and sensitive individuals, but also knowledgeable Jews who are committed to Judaism and leading an actively Jewish life. In some geographic areas the rabbi is the only Jewish educator; in other areas there is a plethora of Jewish education available. In this Report we have recommended that representatives of HUC-JIR and the CCAR be added to this committee, so that areas of long range planning for our Movement which we have not addressed can be addressed together, in a harmonious concerted effort, by representatives of our three major institutions. We commend the HUC-JIR for undertaking a massive review of its curriculum, and we hope that the concerns expressed by our congregations will be addressed. Our congregants are eager to forge stronger direct links with HUC-JIR; they believe there is a direct correlation between congregational health and such a relationship; and they look to HUC-JIR as a source of intellectual ferment, a center for

the propounding and testing of ideas, and a potential producer of tangible programs for the congregations. In this regard, we encourage our congregations to avail themselves of the opportunity to utilize HUC-JIR faculty for retreats and other programs of Jewish education and leadership training, and we encourage the College to expand and publicize the availability of its faculty for these purposes.





## 2. Religious Leadership.

One of the mandates to the HUC-JIR Task Force on Rabbinic Curriculum which was appointed in November, 1985, was to undertake a thorough study in light of the many changes in the Rabbinic School student body (women students, changing religious orientation, etc.), the changes in the lay constituency, and the changes caused by an ever more sophisticated Reform Jewish community. Hopefully, whatever new curriculum arises from the task force's study, it will help to insure that our future rabbis are receiving in-depth training in areas of counselling and problem solving where congregants look to their Rabbis for help - for example, the youth and elderly, single parents, divorce and death. Our committee is confident that attention is being paid (and should be paid) to the numbers of people who are attracted to rabbinic and cantorial careers, and to whom they are. Our congregations are concerned that all of the institutions of our Movement (including the UAHC) address important issues such as the question of how to attract our best and our brightest. This is especially important when no occupation or position appears closed to aspiring Jewish men and women while rabbinic and cantorial salaries do not necessarily compete favorably with other occupations. Moreover, it would be important for a joint task force or commission to undertake a careful review, analysis and a long term projection of the effects of the increased percentage of women in the Reform rabbinate and cantorate.

Other suggestions of the Committee are:

(a) An intensive effort by the congregations and the UAHC, in conjunction with the College/Institute, in recruiting students for the College. This would include promotional and support activities.

(b) The development of a coordination mechanism among lay and rabbinic congregational leadership, HUC-JIR, CCAR and UAHC to allow for a dimension of training which is guided by the expressed needs of congregants -- the "consumers" of rabbinic and cantorial services.

(c) After additional research into the profile of our new rabbis and cantors, it is possible that a formalized apprenticeship program, beyond the present program of student service to congregations with graduates working in congregations under the continuing supervision of the College, would be beneficial.

(d) The increased use of "role model" rabbis and cantors sponsored by the College, the CCAR, the ACC and the Union to travel and visit congregations, on a formalized basis, might be especially helpful in the recruitment of better and greater numbers of candidates for the rabbinate and the cantorate. Past experience suggests that rabbis and cantors are often motivated to consider their vocations as a result of inspirational role models in their formative years.



### 3. Other Professional Leadership.

The development and recruitment of competent personnel, particularly executive directors and educators, is of comparable importance to the development of first rate lay and religious leaders. The advanced degree programs offered by HUC-JIR in Jewish Communal Service and Education are excellent, but what percentage of our executive directors have graduated from the JCS program? The Union in conjunction with the College should develop more short-form programs for executive directors and those educators who have not graduated from the College's advanced degree programs, which will help to develop their skills. For example, administrators daily face problems involving computers, finance, and dealing with congregants and the lay and religious leadership; the more skilled they are in these matters the more effective they will be. The Union should encourage the congregations to send staff members to these programs.

The smaller congregations are usually unable to afford all four of the professionals to whom we typically refer (Rabbi, Cantor, Executive Director, and Educational Director). We recommend that the UAHC, in a cooperative effort with the larger congregations, develop an apprenticeship program, whereby, for example, a person who serves as an assistant director in the large congregation might become the director of a small congregation. Under UAHC leadership, groups of small congregations could join in the utilization of a shared director. Moreover, we recommend the universal use of programs that have been a success

in some regions, where role model professionals donate their time and energy to helping small congregations who cannot afford such staff positions, and where professionals meet periodically under UAHC or professional association auspices to share their knowledge, their successes and their problems.

Whether or not professionals have advanced degrees from the College, the UAHC in conjunction with the College and with the professional associations should develop more programs of continuing education. These programs will be of particular importance to small congregations located in more remote areas where professionals have less opportunity to share ideas with their peers.





B. The UAHC Should Create and Implement A Financial Development Program to Provide Financial Information and Guidance to Congregations.

Demographic data suggests that the Reform movement will grow substantially through the remainder of this century. The New Congregations Committee is "aggressively seeking new congregational members" and doing so effectively. New congregations forming on their own or with the assistance of the UAHC usually face the task of budgeting for their needs without the necessary experience. They initially struggle to gain membership and rent facilities for worship services and religious school. As their membership increases, they usually yearn for their own building. The path from creation to construction can be fraught with financial pitfalls, especially since most new congregations do not have benefactors who can quickly solve financial problems. Drawing architectural plans, negotiating with contractors, supervising construction, selecting furnishings, arranging for financing, raising funds, funding the debt, providing building maintenance and repair -- so many steps that may escape the attention or exceed the talent of the congregants. These concerns also are relevant to older congregations that need larger facilities or major renovation to existing structures. Although the UAHC has addressed many of these subjects and has prepared booklets and manuals which deal with them, either the existence and availability of this information is not known to our congregations or the information does not meet many of their current needs.

Moreover, our congregations (young and old) are subject to the vagaries of demographic change and to swings in the economy. The UAHC is well situated to plan for these developments, and to develop strategies for the congregations to follow when adverse change or disaster strikes. For example, while the UAHC conducts programs at national and regional biennials on the creation of endowments, it should go beyond this. The UAHC should develop congregational endowment plans, based on programs that have been proven successful, test models of those programs, and distribute copies of the successful models as guidelines for study and action.

Whether the financial assistance involves providing information and guidance to new congregations, to those that have progressed to the point of contemplating construction and mortgage financing, to financially troubled congregations, or to ensure the financial future by establishing endowment funds, a financial development program would be perceived by the congregations as a very useful service. We need to remember that the strength and vitality of our Movement and all of its institutions is in direct proportion to the financial strength as well as the spiritual health of our congregations.

We suggest the following regarding the identification of problems, identification of successful programs, and development of financial assistance:

1. Designate a national staff person to provide support at all levels of implementation. The volume of work



would determine whether this could be done by an existing staff member.

2. Establish contact persons in each region responsible for gathering information on existing programs and facilities. The work of these lay leaders should be coordinated through the regional office. These individuals would study such matters as existing endowment funds and how they function as well as the membership, budgeting and building plan status of congregations both new and existing.

3. Identify congregants in each region who can assist in the areas of endowment fund development, fund raising, building and construction financing, bulk purchases of materials and supplies, and financial planning.

4. Study the possibility of shared adult education programs and, in some instances, shared religious schools.

5. Develop case studies and "how-to" manuals, broad enough to be helpful as guidelines, based on the information gathered. These studies and manuals should have the input and agreement of the persons identified in Items 2 and 3 above.

6. Procedures should be developed to enable regions to identify congregations in need of financial guidance. Through the annual MUM reports the UAHC staff should be able to identify most of the congregations experiencing financial difficulty.

7. The contact persons should work with the congregations identified as needing financial assistance, while new individuals would be oriented annually by national and regional staff to perform these tasks.

C. The UAHC Should Create Mechanisms for The Gathering, Analysis and Dissemination of Demographic Data Designed to Support Future Planning Efforts at National, Regional and Congregational Levels.

According to population studies, the Jewish population in the United States is in a constant state of flux with some major urban areas exhibiting substantial growth while other areas are struggling to maintain their populations. However, the trend is upward! Not only is the overall national Jewish population trend on the rise, but the younger population, the so-called fourth generation, is affiliating with Reform congregations at a much greater rate than did their parents or grandparents. The numbers of Jews affiliated with UAHC congregations should grow significantly during the next fifteen years.

The ability of the UAHC to respond to these population shifts will be one of its greatest challenges. Not only will there be an increasing number of congregations desiring to affiliate, but programs will be required for congregations in areas where the population is apt to decline significantly. Many of these situations can be identified in their formative stages only if there is a mechanism for the gathering, analysis and dissemination of demographic studies and their data. If the information is available, the UAHC and the congregations will be able to develop and implement the appropriate programs and services to address these trends.

The data from studies of the metropolitan areas of Atlanta, Denver, Phoenix, Boca Raton, Washington, D.C., Miami



and Los Angeles indicate a growing Jewish population. Where the average age of the Jewish population exceeds 40, there is no growth or negative growth (except for retirement areas with heavy in-migration). Milwaukee and St. Louis, with 45% and 47% of their population exceeding age 40, show no growth. Miami Beach, long an area of retirement in-migration, is experiencing a rapid decline in Jewish population as its retirement in-migration diminishes. Cleveland (48%), Minneapolis (45%), New York City (49%) and Rochester (49%) are other areas likely to experience little or no growth. Conversely, Denver (36%), Phoenix (37%), San Diego (40%) and Washington, D.C. (35%) are experiencing substantial Jewish population growth.

Study after study has shown a strong direct relationship between the age or generation of the population and identification and affiliation with Reform Judaism. In Washington, D.C. 40.78% of those Jews age 18-44 identify themselves as Reform, while only 32.41% of those age 45 and over so identify themselves. Of those affiliating, the numbers are 44.18% and 30.61% respectively. In Milwaukee, 54.5% of those age 18-39 identify themselves as Reform while 49.8% of those age 40 and over so identify themselves. Whereas 73.5% of all fourth generation Jews identify themselves as Reform, the numbers for first, second and third generations are 37.3%, 41.8% and 50.4% respectively. In Denver, the four generations identifying as Reform are 17.2%, 33.8%, 39.3% and 43.4%. In Miami identification as Reform by generation increases from 12.4% to 35.9% to 48.6%. It is imperative that we create the mechanisms

to enable us to determine demographics with more accuracy and to plan effectively for greater numbers of Jews choosing to identify with our Movement.

We suggest that the following steps be taken:

1. Work with other major Jewish organizations and at least one major university in the development of an on-going demographic study of the North American Jewish population. This effort should result in the formulation of common study questions and methodologies to serve as the base for any demographic study by any of the groups (UAHC, Federations, etc.). The effort should also result in the analysis of the data gathered from the individual studies, generally conducted by Federations, and the issuance of a report of the results of such analysis. The analysis would be available to all major Jewish organizations, and the project should be jointly funded through a major university which would ensure its impartiality.

2. Appoint a committee (e.g., a "Research Committee") to assemble, analyze, and report on the studies emanating from the joint demographic effort. Analysis criteria should include generational trends, population movements, age cohorts, identification patterns, and sub-area growth.

3. Analyze membership information submitted with the MUM report for significant increases or declines. Notify the regional offices of declines so that they can assess the reasons, and communicate them to the appropriate UAHC staff and committees.



4. The responsible UAHC staff member should communicate and discuss actual or potential membership changes and their impact with the Research Committee and with the Regional Director and the congregations in the affected area.

5. The Regional Directors should submit annual reports on the progress of this "impact" planning and success or failure of the implemented solutions. The Research Committee should review the progress made and, in conjunction with UAHC staff and the Regional Director, make appropriate adjustments.

The most difficult step will be the coordination of demographic studies through a major university with all major Jewish organizations involved and committed to the effort. We believe that Brandeis University might be prepared to serve and to function as an integral part of such a coordinated effort. The UAHC already has an active Research Committee, and that Committee could be the spearhead of the establishment at Brandeis of an on-going demographic study of the North American Jewish Population.

D. The UAHC Should Hold A Retreat for Key Staff, Trustees and Congregational Representatives (Lay and Professional) to Discuss These Goals, to Discuss The Recommendations and Suggestions for Their Implementation, and to Formulate An Action Plan.

In this Report we have identified and discussed nine goals, made a number of specific recommendations, and made a variety of suggestions. However, no matter how strong our recommendation or suggestion or how we may have appeared to prioritize the matters which we have discussed, we cannot stress too much our position that our Committee's Report should not preempt the consultative process. It is for the UAHC Board of Trustees, in conjunction with and in consultation with the national and regional lay and professional leadership and with representatives from a cross-section of our congregations, to determine exactly what the Union's goals and objectives should be and how they should be implemented. Ideally, our Committee has been the catalyst for the hard work which will ensue.

The Retreat which we have recommended should be the beginning of the consultative process; hopefully it will lead to a mutual definition of the exact goals and objectives and to the development of an action plan.



#### IV

#### Suggested Areas for Future Examination

#### by The Committee

The Committee hopes that it has generated a momentum which will lead to a meaningful analysis and beneficial resolution of problems and possibilities which we confront as a Movement. In this Report we have considered a few matters which we believe to be of great importance to the future of Reform Judaism. Other matters which we recommend for consideration by another long range planning committee include:

1. Enhancement of the relationship among all of the institutions of our Movement which must strive for a shared vision of what our Movement should be. In order to address this goal, we recommend that this Committee presently composed of UAHC and congregational representatives be augmented by representatives of other institutions such as HUC-JIR, CCAR and the ACC, and the relationship of the UAHC and the congregations with these institutions and of these institutions with each other be examined for strategic and long range planning purposes. This is especially relevant today, when the College is undertaking a curriculum review, and when the maintenance of the College remains one of the stated objects of the Union.

2. Examination of the relationship of our congregations and our North American institutions with the State of Israel and with the world-wide institutions of Liberal Judaism. The UAHC sponsors many programs in Israel and supports the World Union for Progressive Judaism and its programs. The questions

would include: What are we doing? What are the other institutions doing? What is being done well and what should be changed? How do the various institutions and various programs which they sponsor relate to each other, and how should they relate to one another? What should be done and what can we do to enhance the status of Reform Judaism in Israel? The examination which we envision would clearly perform the objects of the Union "to strengthen, as an integral part of K'lal Yisrael, the solidarity of the Jewish people in all lands; to foster the development of Liberal Judaism throughout the world under the auspices of the World Union for Progressive Judaism; and to enrich and strengthen the State of Israel as a vibrant exemplar of eternal Jewish values."

3. Exploration of the future relationship between Reform Judaism and other non-Orthodox movements.
4. Examination of the changing role of women.
5. Response to the decline of volunteerism.
6. Addressing the impact of rising costs on Congregational affiliation.

One very important topic which is now being addressed by a joint task force and which we believe should not be addressed by a long range planning committee relates to religious commitment. More than in the past there appears to be a quest by many Reform Jews for enhanced spiritual awareness and identity, for increased education about our rich Reform religious heritage, and for religious practices consistent with the principle of informed choice. Through education, publicity, speeches and



other means, the UAHC and its congregations should emphasize publicly -- and raise our own congregants' consciousness about -- those principles of religious faith, spirituality, tradition and ethical behavior which lie at the heart of Reform Judaism. We commend the UAHC for having initiated the Joint Task Force on Religious Commitment and we wish the new Joint Commission on Religious Living and its members great success.

One final thought: we North American Reform Jews must not lose sight of the fact that the UAHC gives us a national and international presence which we could not possibly achieve as individual congregants or congregations. While some congregations do develop exceptional programs, for the most part our congregations lack the personnel and financial resources to create complete programs and we must rely on our national Union with its national resources. The UAHC should be able to respond to national demographic trends, while the congregations usually react to local trends. Most importantly, a united voice from the UAHC can respond to matters of national or international concern much more effectively than can one congregant or one congregation. Although we have not otherwise addressed this key role which the UAHC plays in our Movement and in our lives (a role which the UAHC Constitution mandates that it play by requiring the Union "to foster other activities for the perpetuation and advancement of Judaism"), we believe that it is a vital role and that the national and international activities of our lay and professional leadership should continue with the same force and vigor that has been exercised in the past.

Conclusion

Our Torah service concludes so eloquently:

"Behold, I have given you a good doctrine; do not forsake it. It is a tree of life to those who hold it fast, and all who cling to it find happiness. Its ways are ways of pleasantness, and all its paths are peace."

Through sound planning, forward thinking and decisive action, we can ensure the future of a vibrant Reform Judaism into the twenty-first century and beyond. Given the unparalleled personal and religious freedom which we enjoy, let us make this happen!





## APPENDIX A

Article II of the Constitution of the UAHC provides as follows:

"The objects of the Union are:

a) To encourage and aid the organization and development of Jewish congregations.

b) To promote Jewish education and to enrich and intensify Jewish life.

c) To maintain the Hebrew Union College-Jewish Institute of Religion.

d) To strengthen, as an integral part of K'lal Yisrael, the solidarity of the Jewish people in all lands; to foster the development of Liberal Judaism throughout the world under the auspices of the World Union for Progressive Judaism; to enrich and strengthen the State of Israel as a vibrant exemplar of eternal Jewish values.

e) To foster other activities for the perpetuation and advancement of Judaism."

## APPENDIX B

### 1. Commissions, Task Forces and Committees

Commission on Jewish Education  
Commission on Reform Jewish Outreach  
Commission on Synagogue Music  
Commission on Synagogue Management  
Commission on Rabbinic-Congregational Relations  
Commission on Social Action of Reform Judaism  
Commission on Religious Living  
Task Force on Soviet Jewry  
Task Force on the Disabled  
Task Force on the Jewish Family  
Task Force on Youth Suicide  
Joint Research  
Jewish Corps of Service  
Religious Action Center of Reform Judaism  
Ethics  
Long Range Planning  
Leadership Development  
New Congregations  
Small Congregations  
Small Congregations Trust  
Communications  
Interreligious Affairs  
Cults and Missionaries  
Caring Community  
AIDS  
Maintenance of Union Membership  
UAHC Fund for Reform Judaism  
Reform Jewish Appeal  
Camp Institutes  
College  
North American Federation of Temple Youth  
Budget  
Dues Policy Review  
Management  
Endowment and Trust Fund  
Biennial Program  
Resolutions  
Time and Place  
Transcontinental Music  
T.V. and Film Institute  
Rabbinic Placement  
Cantorial Placement  
Educators Placement  
Administrators Placement  
Rabbinic Pension Board



## 2. UAHC Programming Departments

Education: Curriculum, teacher education, consultation, publications, TV & Film Institute, Transcontinental Music

Outreach: Jews by choice, non-Jewish partners in a mixed marriage, Jewish education for children of mixed marriages

Worship: Research and Theology, worship models, music

Religious Action: Social Action Commission, Religious Action Center, interreligious affairs

Communications: Reform Judaism, Keeping Posted, Press, public relations

Synagogue Administration: aid to congregations, computers, research and data banks, architectural plans for synagogues

Special Services: Rabbinic Pension Board, Joint Commission on Rabbinic-Congregational Relations, Various Placement Commissions

Youth Activities: NFTY, Camps, Overseas Programs, College Programs

## 3. Recent Publication Areas

Adult Education  
Congregational Community Building  
Caring Community  
Fundraisers  
Holiday Celebrations  
Shabbat  
Senior Programming  
Synagogue and the Community  
Temple Board Activities  
ARZA  
Finances for Medium Size Congregations  
Day Schools  
Jewish Parenting Centers  
Social Action  
Synagogues and the Disabled  
Youth