



# Jewish Portland Tomorrow

Executive Summary  
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## EXECUTIVE SUMMARY

### BACKGROUND

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The Portland Jewish community is at a crossroads. It is growing in terms of sheer numbers, but the majority of these Jews are not engaged. At the same time, current and future community engagement efforts are hampered by the fact that funding support is declining due to a shrinking community donor base and changing donor trends. In an attempt to address these trends, and create a dynamic and vibrant Portland Jewish community, a group of significant community leaders from across the communal spectrum, came together and created the Jewish Portland Tomorrow framework (JPT) – a bold and ambitious strategy that reconsidered the Jewish organizational structure and created a functional approach to service delivery through a reconfiguration of existing Federation-funded agencies. Their efforts initiated a challenging community conversation and also, perhaps more importantly, raised an awareness of the real problems confronting Portland’s Jewish community, so that strategies could be initiated to grow and strengthen the community.

In response to a desire for a broader discussion and a critical analysis, The Jewish Federation of Greater Portland engaged with Dynamic Change Solutions to evaluate and assess the model and determine whether the framework has merit and communal acceptance can be realized. The assessment included vetting the concept in a variety of forums, including interviews and focus groups that included high numbers of agency supporters; fiscal and structural analysis of the model in order to factually determine whether the financial presumptions of the model are accurate and whether there is a financial incentive to implementing the JPT framework; and review of various pertinent documents and case studies from other communities.

### FINDINGS

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The qualitative research provided many insights into the perceptions of the Portland Jewish community. It is a community with increasing geographic and demographic diversity, a big transition from the Portland of the past. Many of the newer Portland residents have a propensity to stay “off the communal grid”; they are looking for hyper-specialized services; and, unlike in the past, non-Jewish institutions are now viewed as viable and serious competitors for services and programming.

Perceptions of Portland’s Jewish community institutional volunteers make it clear that there are opportunities for the community to think about how it could better go about its business in order to truly create a great Portland Jewish community. The service quality of the existing agency program offerings is viewed as okay to good, certainly not great. Synagogues are

perceived as problematic and the Federation as struggling with relevancy. On top of these issues, collaboration across the organizational landscape is hampered by turf protection.

The issues facing the Portland Jewish Community can be summed up as follows:

- The community's long-standing philanthropists are aging and/or relocating.
- The giving patterns and interests of philanthropists' children are changing.
- There is a large population of identified, but not institutionally connected Jews.
- There is a significant lack of engagement among newer and younger members of the community.
- Jews in Portland can go anywhere for most services or opportunities and do not require nor, for many, avail themselves of those offered by the Jewish community.
- There are perceived redundancies across agencies.
- Donors who give to multiple organizations are growing fatigued with multiple asks.

While these global concerns are acknowledged as real, there is a major tension in creating the rationale for change because most institutions do not see the immediate effects on their agencies. In spite of the very real financial threats to the organizations, in their daily reality, they see themselves as having functioning and unique boards; operating income is steady to growing; there is little duplication of top donors; and a significant number of their Top 50 donors don't give enough individually to make the loss of a particular gift cataclysmic. Many of the organizations annually make their budgets, continually raise just enough funds and have a pool of volunteer leaders. Therefore, for many of the agencies the clear urgency of the issue simply does not resonate. For any collaborative model to be considered in a serious manner, the correlation between the larger communal issues and agency specific impact, needs to be acknowledged and a dedicated effort made to help overcome this complacency.

The research also revealed significant hurdles that were created because of the process that was undertaken to date. JPT was not viewed as an open process, and it was rolled out in less than a strategic manner. Given the uneasy relationship of the agencies with the Federation, the JPT process led to beliefs that JPT is a top-down takeover, a Federation bailout, or an attempt by the Federation CEO at "building a kingdom". Clearly, the manner in which the JPT framework was rolled out created strong and passionate responses which impact not only future conversations but also the ability to implement any future framework.

Finally, the assessment revealed issues with the JPT model itself. One of the biggest tensions uncovered was confusion about the real purpose of JPT. While many agreed that its purpose is or should be about enhancing Jewish life in Portland, it seems that thus far it has primarily been presented as an opportunity for efficiencies. While there is obviously interest in cost savings,

the real excitement lies in how these savings can be reallocated to create a strong, vibrant and dynamic Jewish Portland. Even this vision of a vibrant Jewish Portland, though, lacks clarity.

## NEXT STEPS

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The structure around JPT can be one of functional consolidation or it can be more about shared services. There are widespread opinions as to exactly what the “right” form is for the model, and multiple ideas about what agencies should be included in an actualized JPT model. In addition to trying to resolve the issue of who would be in and who would be out, various and competing views arose centered around whether the next steps should be continued and broad-based communal discussions, small step shared services, or imposing a model. Broad-based communal conversations are an important element in any effective change process; however, these can also delay decision making until whatever momentum that existed is lost and complacency for the status quo returns. Small-step shared services would help to overcome many of the trust issues and create closer inter-organizational working partnership, but there is concern that these would ultimately become an end in and of themselves and would only affirm that the whole JPT process was more about cost efficiencies than a vision for enhancing Jewish life. Imposing a model is not really viable and would not achieve any measure of success.

The urgency for the need to change and the vision of what Jewish Portland can be can easily become lost in the debates around the detail of form rather than function. Clearly opportunities for functional consolidation and cooperation exist. There are self-identified redundancies and efficiencies in executive positions, finance functions (including synagogues), facilities utilization, event planning and human relations, as well as opportunities to work together for enhancements in facility related collaboration, finance, programming, collaborative fundraising, leadership development and development positions. The challenge will be balancing experimentation through small steps with not losing the big and bold vision of enhancing Jewish life.

The major challenges ahead can be summarized as follows:

- The agencies (plus ideally synagogues and non-affiliated partners) need to recognize that the global challenges absolutely impact them and that these efforts are not focused only on the greater good of the community but also, them.
- All of the organizations must accept that they are susceptible to the issues, and no one organization can address them on their own.
- Form must follow function, so that detailed structural discussions do not hijack the momentum and, rather than empowering big thinking, trap the community into micro-managing and minimizing change.

Portland's Jewish community truly has the opportunity to enhance Jewish life. Through the initial work of the JPT Committee, and a strong coalition of new willing partners, exciting opportunities and impact can be imagined when:

- A new and dynamic vision is created and embraced.
- Portland's Jewish community offers the **BEST** and **GREAT** services and programs.
- The community works together to figure out how best to deliver these services and programs and puts aside questions of where they are housed and who will deliver them.

Whether the primary intention of the Jewish Portland Tomorrow Committee was to create a full model or start a conversation is no longer relevant. Even if resistance for how this came about frames the past and current perceptions, there is general support for the idea of institutions sharing services and a sincere openness to functional consolidation to enhance Jewish lives. The resistance and confusion can be overcome and significant changes can take place, including a major institutional system change, if:

- A guiding coalition of key stakeholders is partnered with to generate the solution.
- A strong case for why this is needed now is developed and articulated (urgency).
- A detailed vision for what Portland's Jewish community can be, and the impact it can have on enhancing Jewish life, is developed and shared through broader involvement.

To achieve success Portland's Jewish community will be well served to create a deliberate process, involving external expertise (outside consulting facilitation) built on a broad-based effort. Such efforts, we know from change management, do not need to start broad-based, but can and should start with the few who have the communal and political gravitas and organizational girth to empower action, making sure though to constantly expand the circle. This report details the recommended next steps.

To achieve the collective buy-in required for the kinds of changes needed, a message of urgency and one of vibrancy must be created. It is clear that there is not enough communal support **today** to implement the full JPT framework, but enhancing Jewish life and building a great Portland Jewish community **can** be realized. The process will not happen quickly, nor will it be without distractions and detours. Following a carefully laid out strategy is just the first step. Providing the needed time, which can take six-eighteen months for the first four - six stages, is essential for success, as is following the appropriate steps. Portland's Jewish future can be great, but only if it acknowledges and accepts that real change is necessary for each and every one of its organizations.