



# Jewish Portland Tomorrow

Assessment and Next Steps  
5/29/2014

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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 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.

## SECTION 1: INTRODUCTION AND METHODOLOGY

### INTRODUCTION

Portland's recent demographic study suggested that the Jewish community has increased significantly both in terms of population and geographic dispersement. Portland is no longer a community of under 10,000 Jews living in one area. While the community may look strong in terms of sheer numbers, the reported perception and reality is that the majority of these Jews are not engaged. Furthermore, an increase in community engagement efforts is hampered by the fact that, as the community's donor base shrinks due to aging and changing donor trends, sustained funding of initiatives and the existing infrastructure is, and will become increasingly more challenging. Recognizing the dynamics facing Portland's Jewish community, a small ad-hoc group of committed donors from across the communal spectrum convened for approximately five months and proposed a framework that would significantly change how the community's organizations engage with the Jewish community - the Jewish Portland Tomorrow framework, which was introduced as "Jewish NEWCO".

The Jewish Portland Tomorrow framework (henceforth referred to as JPT) was 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, and even the Federation itself.<sup>1</sup> This model of merged and consolidated organizations is not foreign to Portland's Jewish community,<sup>2</sup> and is a growing trend nationally. In its initial iterations the JPT framework proposed providing services in five functional areas by consolidating several of the existing agencies under one umbrella organization. As one organization, the JPT model would serve as the hub for the community's future growth, centralizing cultural, social service, educational, and recreational activities, together with the philanthropic efforts required to sustain Jewish community life.

This proposed framework met with considerable resistance from many segments of the community. While some saw it as a fully-baked entity that was to be imposed, and others as a great conversation starter, the reactions have been strong and spread across the continuum. Many see a consolidated model as a necessary change, while others interpret it as an assault on the agencies' independence and the antithesis of what Jewish Portland needs. In either case a critical, yet difficult community conversation has been initiated. In response to a desire for a critical analysis and broad-based discussions, The Jewish Federation of Greater Portland engaged with Dynamic Change Solutions to evaluate and assess the model and determine

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<sup>1</sup> See Addendum A (JPT Marc's Remarks, January 3, 2014)

<sup>2</sup> The MJCC and PJA appear to be doing this successfully, as did the PJA's antecedent organizations.

whether the framework has merit and communal acceptance can be realized. To achieve these objectives, the following functions were performed:

- Vetting the concept in a variety of forums, including interviews and focus groups
- 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
- Document Review
- Case Studies

These tasks were conducted over a period of approximately eight weeks resulting in this report. These findings provide the foundation for how the JPT Committee's initial work can be utilized to create a strong sense of urgency and vision so that Jewish life can be enhanced in manners that truly impact the lives of Portland's diverse Jewish citizens.

## METHODOLOGY

In order to fully assess and analyze the viability and feasibility of the Jewish Portland Tomorrow framework, Dynamic Change Solution utilized both qualitative and quantitative techniques.

### QUALITATIVE RESEARCH

During the feedback assessment phase, Dynamic Change Solutions interviewed over 124 people<sup>3</sup> and conducted a dozen focus groups with a special emphasis on groups comprised of agency representatives.<sup>4</sup> Attempts were made to ensure representation across a broad demographic, age, and connectedness spectrum. This phase included:

- Interviews with Federation-funded partner agency Executive Directors and Presidents (two meetings with each)
- Targeted focus groups (i.e. Rabbis, Agency Board members, JPT Committee members, Federation Board, Federation staff, non-affiliate organizations, young adults)
- Mixed focus groups composed of synagogue, agency and federation representatives
- Key Stakeholder interviews and focus groups
- General community focus groups
- Focus group convened at Portland's Moishe House and a young leader's home

<sup>3</sup> Addendum B (List of interviewees)

<sup>4</sup> Addendum C (Copies of Interview Questionnaires)

These interviews and focus groups, many of which were composed almost entirely of agency recruited individuals, captured a broad representation of views, ideas and attitudes.<sup>5</sup> Common themes were then identified and analyzed for consistency and trends. Those ideas and statements that had common representation, were included as part of the findings report.

In addition, associated research was conducted by reviewing the agencies' marketing materials and information packets as well as the community's recent demographic study.<sup>6</sup> This material not only provided a sense of how the agencies market and brand themselves, but the programs and activities that are provided. In addition, multiple months of the Oregon Jewish Life and The Oregonian were reviewed. Research studies such as *A Portrait of Jewish Americans* (Pew Research Center), *Giving USA 2013: The Annual Report on Philanthropy in America*, and *The 2012 Study of High Net Worth Philanthropy* were utilized for this assessment, as well as additional relevant materials.<sup>7</sup>

Four case studies were also developed that examined different consolidated models involving similar organizations to those that exist in Portland. These include the following:

- Orange County, CA (Federation and JFS)
- East Bay, CA (Federation and Jewish Community Foundation)
- Austin, TX (Federation, JCC, JFS)
- Akron, Ohio (Federation, JCC, JFS, Day School {Synagogues})

While each of these communities has unique qualities that differentiate them from Portland's Jewish community – including size, demographics and growth vs. decline, each also went through different processes to create their models. Each model demonstrates that there is no one size that fits all, and that there are multiple configurations (including structure, funding, governance) that Portland can learn from as it looks towards its future.

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## QUANTITATIVE RESEARCH

As part of the fiscal and structural analysis phase of the project, twelve organizations (see following page for list) were asked to submit comprehensive data including FY11-13 budgets, profit and loss statements, three years of annual giving data on their Top 50 donors (classified

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<sup>5</sup> In order to better understand the reactions to JPT, we did not open the focus groups to the entire community however, a special effort was made by the Federation to ensure a broad spectrum of views, including inviting anyone who had approached the Federation with negative views about JPT.

<sup>6</sup> Organization, agency and institution are used interchangeably in this report. Unless otherwise noted, when referencing these entities, the document is speaking about the ten allocated agencies, the JFGP and the OJCF.

<sup>7</sup> Addendum D (Select list of external resource materials)

by giving categories)<sup>8</sup>, and information on clients/users, board structure, development, facilities and staffing.<sup>9</sup> IRS 990s were also reviewed. In addition, Dynamic Change Solutions received three years of agency Board lists provided by the JFGP. This data was aggregated and analyzed to examine JPT’s foundational principles and feasibility from several angles. The agencies were promised complete anonymity with the data they supplied, unless such data was already publicly available. To seek greater clarity, many of the analyses were conducted across all the organizations, as well as by segmenting them by revenue size (over \$1 million and under \$1 million in operating revenues).

Over \$1MM	<\$1MM
B’nai B’rith Camp (BB Camp) Robison Jewish Health Center (CSP) Jewish Family & Child Service (JFCS) Jewish Federation of Greater Portland (JFGP) Mittleman Jewish Community Center (MJCC) Portland Jewish Academy (PJA)	Maimonnides Jewish Day School (MJDS) Florence Melton Adult Mini School (Melton) Oregon Jewish Community Foundation (OCJF) Oregon Jewish Museum (OJM) University of Oregon Hillel (UO Hillel) Greater Portland Hillel (PDX Hillel)

Due to the compressed timeline which required the agencies to submit data very quickly, the ability to develop appropriate tools to obtain financial information in a consistent manner was limited. Furthermore, because of an identified lack of trust from many of the agencies to the initial process and the assessment, concerns about sharing information led in several cases to delays and incomplete and/or inconsistent data<sup>10</sup>. As such, financial data had to be accepted as accurate and could not be validated.

Due to these inconsistencies, many of the analyses evaluate data from different budget lines or form entries that fall within the same general genre but may not be an exact comparison. Recognizing both the limitations as well as the willingness of many to provide a tremendous amount of information, there is a high level of confidence that the data as reported presents an accurate enough picture to draw conclusions. In those cases where data was not supplied, or where there are factors that the reader needs to be aware of, these will be highlighted.

The report’s initial findings were presented on March 17, 2014 to four different groups: JPT Committee, Agency Presidents, Agency Executive Directors and the JFGP Board of Directors. Based on comments and questions, revisions and clarifications were made for the purposes of this report. A draft report was presented to a joint meeting of the JPT Committee and the JFGP

<sup>8</sup> The assessment did not collect or analyze comprehensive capital fundraising data, nor was any fundraising data collected from synagogues.

<sup>9</sup> See Addendum E (Data forms).

<sup>10</sup> In several cases agencies reported different numbers than were reported in the forms or in their IRS 990s.

Board on March 27, 2014 for review and comment. A final draft version was distributed to the agencies for discussions with JPT Committee and Federation leadership in April and May.

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## OPERATING ASSUMPTIONS

The methodology and analysis were framed by a set of five key operating assumptions:

1. *The client was Portland's Jewish community (although the fee was paid by the JFGP).*

Based on the goal of looking at this analysis as a way to help the larger community, as well as the lack of trust from the agencies and others in the community, it was essential to treat and respect every entity (e.g., the Portland Jewish Community) as the client.<sup>11</sup>

2. *Many of the issues confronting Portland are reflective of trends identified in established research (e.g., Pew, Giving USA, The 2012 Study of High Net Worth Philanthropy).*

As will be clearly indicated below, many of the most serious challenges confronting Portland's Jewish community, such as philanthropic trends, communal connectedness, social integration and Jewish identity, are not unique to this geographic area. In order to better assess strategies and develop recommendations, the community is best served to not only look at developing its own visionary responses, but to examine representative and best practices from other communities that have achieved some modicum of success associated with addressing these challenges.

3. *Portland has unique qualities that impact communal strategies.*

Although #2 above suggests that Portland may have much in common with other cities and Jewish communities, it would be a profound understatement to imply that Portland is NOT unique. In the lexicon of metropolitan uniqueness, Portland stands out.<sup>12</sup>

4. *70% of change efforts fail or do not achieve their objectives.*

The JPT framework envisions a major change to how the community's organizations operate. Change efforts of this scale can succeed (see below Case Studies); however, in the for-profit and not-for-profit worlds the landscape is littered with failed change efforts. Research indicates that 60-70% of all change efforts fail or do not achieve their objectives. This is not an excuse to avoid change, but rather a starting point to emphasize the importance of going about change in a strategic and thoughtful manner.

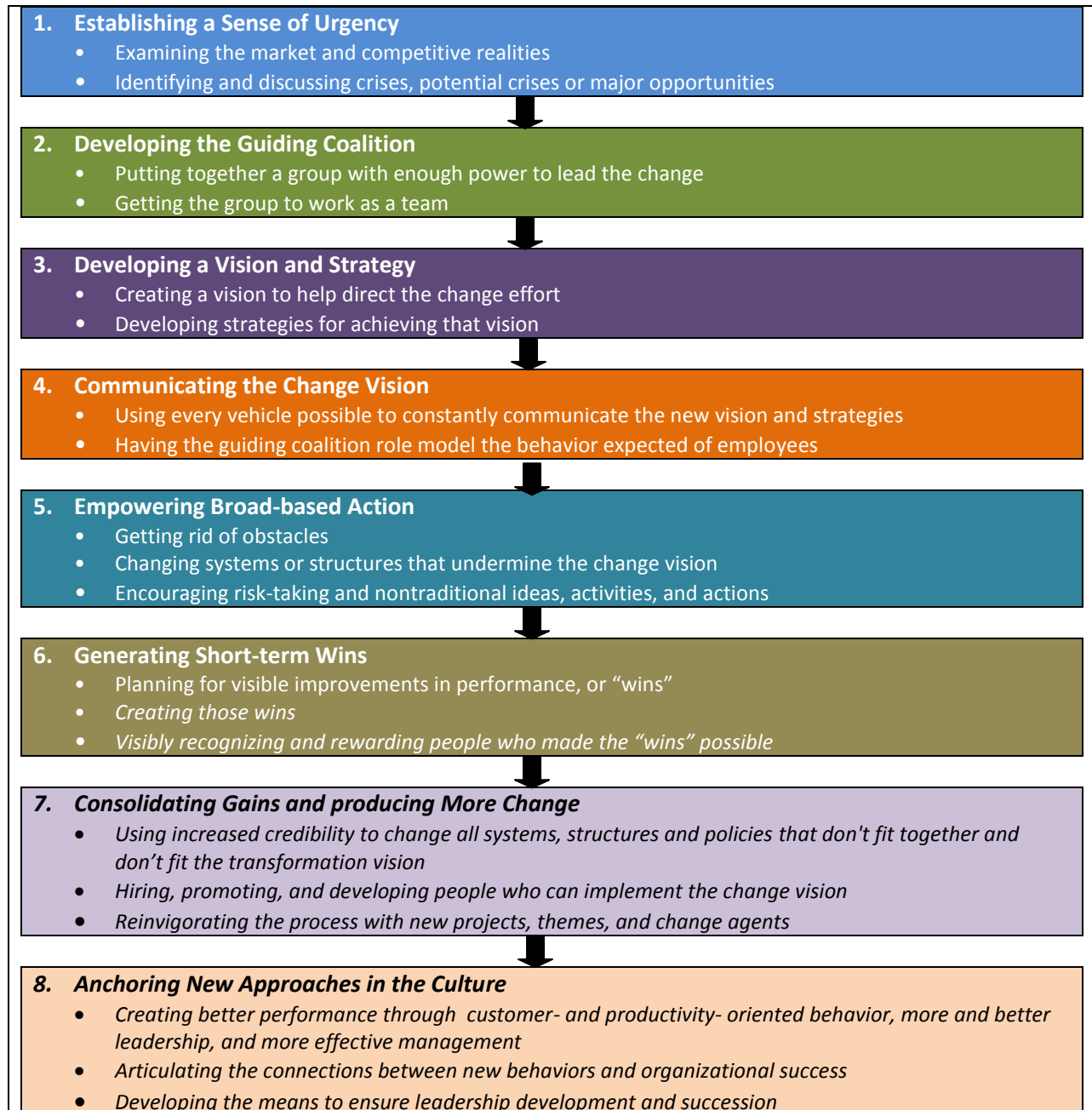
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<sup>11</sup> Additional agency interviews were added to obtain a better understanding of each organization, its mission, challenges and opportunities. This enabled a more focused second meeting concerning the organization's reaction to, and perspectives on the JPT framework.

<sup>12</sup> While this statement is not quantified by any empirical evidence, there is general acceptance of this perception.

5. *Change efforts that succeed, follow consistent, and research-proven strategies.*

Successful change requires building a foundation before proceeding to the next level.<sup>13</sup> Each phase rests upon the proper inputs and outputs of the last phase although some overlap between phases can exist. The change foundation on which Dynamic Change Solutions models its work is the “Eight Stage Process of Creating Major Change.”<sup>14</sup>



<sup>13</sup> Initially Dynamic Change Solutions proposed to facilitate a series of board workshops on effective collaboration and change. This was eliminated due to concerns that these programs would be perceived by some to challenge the integrity of the assessment.

<sup>14</sup> Leading Change, Dr. John P. Kotter, Harvard Business Review Press, 1996

## SECTION 2: ASSESSMENT FINDINGS

### PERCEPTIONS OF THE PORTLAND JEWISH COMMUNITY

While every community has unique qualities, there are almost always some that truly set one community apart from the next. In Portland's case, and in particular the Jewish community, three primary characterizations were identified that shape the organized community and how it relates to its citizens. All three can paint a picture of Portland, but when viewed through a Jewish lens, they provide important perspectives that need to be taken into account when developing institutional and communal strategies.

#### 1. *"Off the Grid"*

Studies on migration and psychology have suggested that people who move from one community to another (with the exception of those who move for a specific job or relationship), have a different psychology than those who remain in their home communities. These individuals, it is argued, are less bound to tradition and the concept of community. Studies in Jewish communal mobility affirm that:

"When Jews leave their place of origin and end up somewhere else, density matters more. In general, they are less likely to remain Jewish if their final destination has relatively few other Jews, and they are more likely to remain Jewish if their ending point has relatively more Jews. In other words, mobility has the potential to unmoor Jews from their religious identity, and that process can be exacerbated if relatively few other Jews are nearby or countered if relatively many other Jews are in the area."<sup>15</sup>

This dynamic is enhanced by those who move west, as well as those who choose in particular to move to Portland from long established Jewish communities on the East Coast and Midwest. Whereas for one who moves west to a city like Los Angeles, San Francisco or Seattle, the move brings with it a larger Jewish community as well as a larger urban setting, moving to Portland is indicative of a very different kind of place. Jews who move to Portland may either truly be psychologically more disinclined to connect with community and/or just less interested. While historically, Jewish communal disconnectedness may have been mitigated by a world in which doors were closed to Jews, thus "forcing" a connection to Jewish community (rather than social isolation), this dynamic is no longer at play. We know from studies that even within cities with high (Jewish) migrant rates, those inclined to connect will chose to live in parts of the city that generally have a higher concentration of

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<sup>15</sup> Moving: The Impact of Geographic Mobility on Jewish Community, Jewish Federations of North America, November 2009

Jewish services than those less inclined. For Portland, a city that still “has” a generally perceived Jewish geographic area, Jewish mobility to other parts of the city affirm this “off the grid” concept.

## 2. *“Hyper-specialization”*

Throughout the interviews and focus groups, the message was conveyed that Portland is not a “big-box” city, but rather a city of “boutique” offerings. In multiple groups the idea was posited that for Portlanders, specialization is the normative practice whether it comes to food and drink (e.g., food carts, microbreweries), activities or where one shops.

The impact on the Jewish community is that many of those interviewed see the critical importance of the community’s entities offering hyper-specialized services. Conversely, and curiously, many of those representing some of the largest Jewish communal entities saw themselves as being reflective of such specialization and the very antithesis of “big-box”, while those looking in often saw these very same entities as the epitome of “big-box”.

## 3. *“Geographic and Demographic Diversity”*

There is universal agreement within Portland’s institutional Jewish community that the number of Jews in the city has increased significantly beyond the historic 10,000, and that Jews are now living in areas that Jews didn’t historically congregate and live in. This, plus the growing numbers of young people, is indicative of a community unsettled from its historic foundational moors and seeking a new communal equilibrium.

Compounding these factors are the dichotomous challenges associated with being both a growing and declining community. Whatever the actual number of Jews is in Portland,<sup>16</sup> the reality exists that, while the total Jewish population is larger, the population of connected, engaged and “affiliated” Jews as a percentage of the whole is declining. Regrettably, this may have little to do with what Portland’s Jewish community offers and more to do with national identification and mobility trends (i.e., communities such as Las Vegas, Phoenix, Atlanta that experience significant Jewish growth over a relatively short period). That Portland’s growth is also composed of a large number of younger people (vs. retirement relocates) exacerbates the Pew related dynamics.

These three characterizations were identified or affirmed through comments expressed in the focus groups and interviews. As part of each meeting, participants were asked to use one word to describe Portland. The following is a representation of their responses. The focus group participants and interviewees were consistent in the positive and negative adjectives they used

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<sup>16</sup> The number of Jews reported in the community’s demographic study has not gained widespread acceptance.

to describe the Portland community (as well as a preference to articulate negative terms more often than positive). These terms paint a very descriptive picture of Portland’s Jewish community.

POSITIVE DESCRIPTORS	NEGATIVE DESCRIPTORS
diverse	siloed; disconnected; segmented; disjointed; scattered (geographically and organizations); fragmented
ready for reinvention	demographically challenged
liberal; slightly off mainstream	unaffiliated; unengaged; indifferent; secular/assimilated
expanding; growing	stuck in one place (geographically and in types of services/how to experience Jewish life); stagnant; lethargic
Vibrant	threatened by irrelevancy
Intelligent	sustained by non-Jewish members
committed; passionate	Apprehensive
Young	Young
	Competitive
	Confused

Figure 2

What stood out, and is of particular note for Portland’s Jewish community, was both the frequency in which certain descriptors were utilized and the implications of these descriptors with the dichotomies that grow out of them. For example, diversity should lead to the opportunity for increased offerings and engagement in different ways and at different levels; however, it can also lead to a feeling of being disjointed and scattered if the offerings aren’t presented in some sort of cohesive manner. Committed, passionate people can be a big asset, but only if they view the Jewish community as relevant; otherwise they focus their passion on other secular causes. These dichotomies impact all of the community’s Jewish institutions and their ability to serve, generate continued philanthropic support, and sustain their existing physical and organizational infrastructures<sup>17</sup>.

Out of these perceptions developed a picture that describes a Portland Jewish community that shares much with multiple communities throughout the United States, as well as a community that has unique qualities. To understand the Portland Jewish community and to develop strategies to impact this community requires the recognition, acknowledgement and acceptance of what is, and what is not, Jewish Portland.

- *Communal Transition*: Similar to many Jewish communities that have undergone tremendous growth, where there was once a small and distinct Jewish community,

<sup>17</sup> This statement, and these perceptions, also bare relevance to the community’s synagogues, even though they were not part of the JPT framework.

Portland now struggles with its past and future. While the past epitomized Jewish communal connectedness, there is now a community characterized more by outsiders than natives and more people not connected to the community than connected. Due to the strengths and connectedness of the “native” (and long time) residents, these individuals are closely linked together and support the community disproportionately to the whole. This group, which crosses multiple generational lines, is still adjusting to a community that once had just a few congregations and now finds congregations and Jews everywhere. As one interviewee stated: “*You used to be able to draw a circle and get 75% of the Portland Jewish community.*” Nevertheless, while these people long for the past, they also willingly look toward the future. The challenge for many, however, is that while they accept that the past does not have a veto, they strongly believe the past is entitled to a vote (which can, if not appropriately respected, sabotage the changes needed to improve the community in the future).

- *Open Doors:* Although it is a western community, with fewer social restrictions than found in eastern communities, Portland’s Jewish history was still built on the foundation that Jews went to the institutions that they built. That paradigm has now shifted and the legacy Jewish institutions – such as B’nai B’rith Camp, Cedar Sinai Park and the Mittleman Jewish Community Center – are now in competition with non-Jewish institutions and organizations (some of which Jews never would have gone to). Thus, the competitive landscape is far broader and more intense for the Jewish institutions.
- *Easy Entrée:* Portland is a community that prides itself on being warm, welcoming and a place where if someone wants to become engaged, or become a leader, s/he can do so just by stepping forward. There are few institutional or generational barriers in the way of engagement or involvement.
- *Egalitarianism:* Within Portland, and the Jewish community in particular, there is a general sentiment that every view has legitimacy and every voice an equal decision making say, whether one is a member, contributor, participant, or has no involvement whatsoever. The impact of this philosophy is that communal and organizational decisions can be filibustered or prolonged long enough for indecision to take hold, and communal lethargy and complacency to kill any new idea.

## KEY FINDINGS

- Population growth conceals the fact that the community is more appropriately reflective of a declining community with decreasing percentages of “affiliated” and “engaged” Jews.
- Portland’s Jewish community is at a historic crossroads. Between the impact of national trends, and the manner in which it currently conducts its business, its continued decline is predictable unless major changes are made.
- Portland’s unique qualities make its challenges that much harder to overcome. However, opportunities exist to overcome these issues and create strategies and a vision to dramatically enhance the lives of its Jewish population.

## PERCEPTIONS OF PORTLAND JEWISH COMMUNITY INSTITUTIONS

Jewish life in Portland is built around five interconnected, albeit usually separate, universes of influence. These are:

- Agencies (Federation supported)
- Synagogues
- Free standing organizations (e.g., Jewish Theatre Collective, Moishe House Portland, Portland Jewish Artists)
- National/pseudo-national (e.g., Oregon Area Jewish Committee)
- Individuals/individual networks (Individuals who connect to their Judaism and build their Jewish community around themselves).

Two major themes emerged in how these are perceived:

### *1. Collaboration, Co-Sponsorship and Turf*

One subject associated with collaboration that frequently arose was that of mergers. While significant resistance to mergers as a part of the JPT framework was conveyed in multiple interviews, it is curious to note that Portland’s Jewish community has a history of mergers. These included the merger of Hillel Academy (1961) and The Jewish Education Association

(1934) into The Portland Jewish Academy, as well as the recent MJCC/ PJA merger.<sup>18</sup> Currently, The Oregon Jewish Museum and the Oregon Holocaust Resource Center are finalizing a merger. The juxtaposition of successful mergers with resistance to potential future mergers appears to be more in reaction to the JPT methodology and concept.

In terms of collaboration between agencies, beyond the formal connections between PJA and MJCC and those with JFCS and Cedar Sinai Park, there were few reports of significant interaction among the organizations (beyond collective gatherings of the professionals). While some joint programming takes place, most often it is an expression of co-sponsorship rather than true collaboration. Little macro scale problem solving between the organizations was identified.

Even less interaction was identified as taking place between the agencies and the synagogues. In fact, what became clear through many of the discussions was that the Rabbis feel disenfranchised (and hostility) from agencies and the agencies see synagogues and rabbis as endemic of the problems that are confronting the community.

The net result of the dearth of actual collaboration, which is frustrating to community members (including agency and synagogue board members), is that there is a strong perception that “turf is a problem for them – but not us.” What was identified in the interviews, however, was that the “them” and the “us” were completely interchangeable. Everyone in the institutional universe (primarily synagogues and agencies) is equally guilty of turf protection.

Ultimately though, turf battles and how they are perceived, while important, should be the least of the agencies’ (and synagogues’) concern. Throughout the interview process the issue of program quality, or more importantly lack thereof, was articulated as a major concern that needs to be addressed.

## *2. Service Quality, Jewish Programming and Serving Non-Jews*

Disparate demographic voices opined on the lack of quality programming and services. In their view, the organizations offer “okay” to “good” services, but not “great”, and certainly far from the “best”. This perception, plus the sense that Portland’s agencies offer limited Jewish programming describe an institutional product that is not seen as vibrant, visionary,

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<sup>18</sup> Many of the interviewees saw the combined MJCC/PJA as a model that is working well (even though there is certainly not agreement that saving the MJCC was a good idea), and a valuable first step toward further consolidation.

exciting or descriptive of a dynamic Jewish community, least of all one that is able to implement opportunities that can truly enhance Jewish lives.

As concerning as the issue of mediocre quality Jewish programming and services is, was the profound and significant discontent expressed concerning serving of non-Jews as an economic underpinning for institutional survival. While many of the organizations articulate a cogent rationale for why they have expanded service to non-Jews, the message has not been understood or accepted in the larger community (even among many of their own supporters and board members).<sup>19</sup> While the organizations often expressed that this business construct enabled them to provide service to Jews, this mission vs. business framework did not resonate. Multiple voices, even from ardent supporters, questioned the need for continued communal support for organizations such as the MJCC, JFCS and Cedar Sinai Park. As one respondent suggested, *“why do we need to support an organization that rents itself out to a non-Jew to provide services to non-Jews?”*

These visceral expressions, plus questions about Federation’s continued relevancy as well as views expressing frustration around synagogues’ inability to engage, all suggest that there are tremendous opportunities for the community to think about how it could significantly improve the manner in which it goes about its business of creating a great Portland Jewish community.

#### KEY FINDINGS

- The organizations’ (agencies and synagogues) programs and services are viewed by those most connected as okay to good, and far from great. There is a real desire for excellence.
- Economic models built on serving non-Jews (even as a way to fund services for the Jewish population) is the cause of real discontent even by supporters of the organizations that utilize this business model.
- Portland’s Jewish communal universes do not have a history or culture of real collaboration, resulting in the absence of true community-wide problem solving. Confronted with the very real issues that need to be addressed this must be overcome for the community, and it’s organizations to thrive.

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<sup>19</sup> Only one organization was able to provide detailed data about the percentage of non-Jews served.

## PORTLAND JEWISH COMMUNAL ISSUES

Although the Jewish Portland Tomorrow framework received significant pushback after its release, throughout the assessment process there was almost universal agreement around the issues that motivated the JPT committee.

- 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 community members
- 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

In terms of assessing the JPT framework, although multiple concerns focused on the process and the framework's proposed structure, there is recognition that the Portland of today is different than the "old" Portland. Many of the long-standing community members and institutional leaders continue to long for the Portland they have always known, but they accept and recognize the need to build for today's community. Nevertheless, while they conceptually understand the need for change, they do not necessarily see many of the issues impacting the organizations they are most passionate about, and thus do not see their particular institutions needing to change. In their eyes, the staffs are committed and good people, the boards are composed of passionate and dedicated volunteers, quality services are delivered and budgets are ultimately balanced each year.

Younger Gen X and Millennial interviewees, on the other hand, were strong in the expression of the need for institutional change and were focused far more on delivering impactful services than maintaining legacy institutions.

### KEY FINDINGS

- There is widespread acknowledgement and agreement around the global issues confronting Portland's Jewish community.
- There is a strong disconnect between people feeling that, while the community or other organizations ("not mine") need to change, "their" particular organization is just fine. This must be **overcome** before the community can resolve its issues.

- Denial and complacency are the current default positions for most of the organizations' leadership.
- Younger generations have little, if any institutional loyalty and are focused more on services than organizations.

## RATIONALE FOR CHANGE

The review of agency data in several key areas helps affirm why there is a disconnect and tension between accepting the global challenges and their perceived lack of impact on individual organizations. The challenge of overcoming the resulting institutional complacency may be complex, but not impossible.

- Governance

One of the primary concerns expressed about the JPT framework was that by creating one board the community will lose the opportunity to engage large numbers of volunteers through governance. The data we analyzed suggests that Portland's Jewish community enjoys, in general, a diverse, albeit small, volunteer board system. Over the past five years, 272 unique individuals<sup>20</sup> have served on twelve boards, and 26 of these individuals have served on multiple boards, thus indicating that there is limited overlap on agency boards at any given time (Figure 3). In addition, 530 individuals currently serve on standing committees.<sup>21</sup>

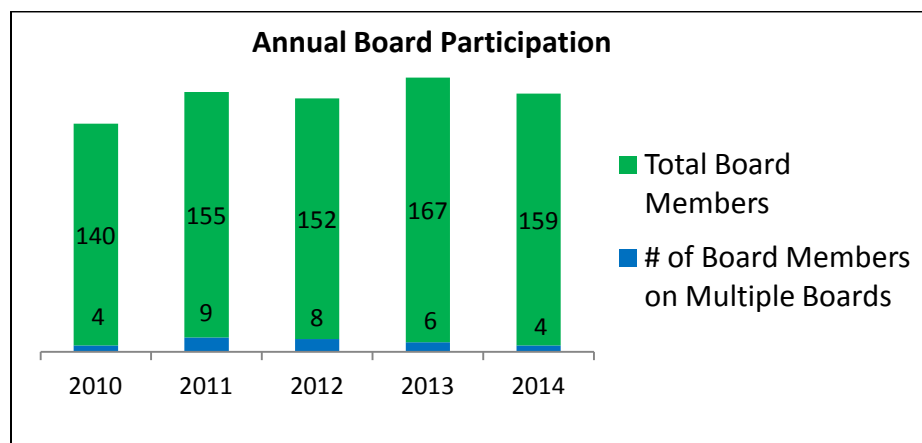


Figure 3

<sup>20</sup> The sum of 272 is greater because some people served on multiple boards for more than one year.

<sup>21</sup> Some Standing Committee members may also serve on Boards.

The data (as seen in Figure 4 below) also suggest that across these organizations' boards, board members appear to rotate off boards in a normative manner.

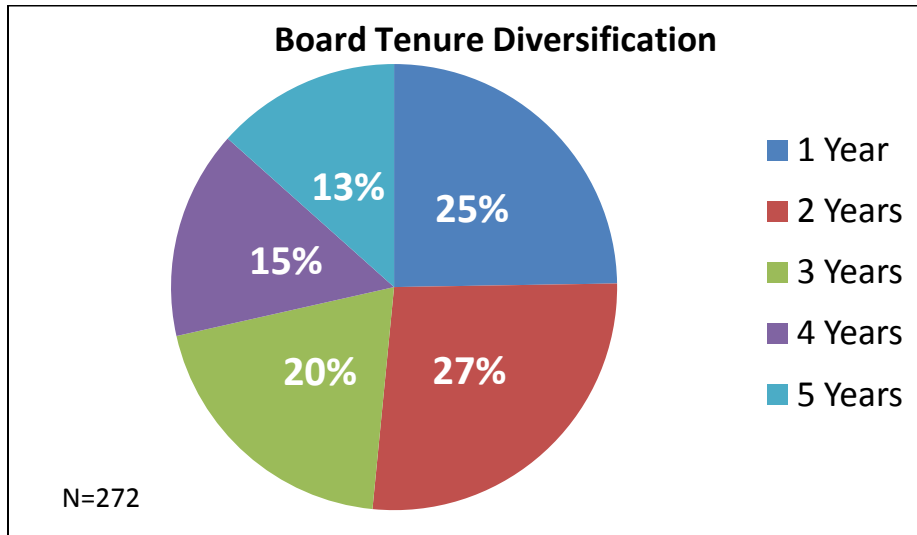


Figure 4

Thus, from an agency's perspective, they have well balanced boards that are composed of volunteers who serve, at any given time, primarily with them. In addition, from their perspective, they have operating standing committees, thereby well serving their governance needs. For those who oppose the JPT framework, this data affirms that while a super-board for a new JPT entity may seem both efficient and necessary, such a structure would greatly reduce the opportunity for people to engage at a leadership level. They believe that not only would such a board potentially lead to losing passionate leaders, but also it might be particularly alienating to younger community members who are less experienced and therefore less likely to receive one of the limited spots on the super-board.

Conversely, these same findings suggest a far different picture. Taken together, 272 people over five years does not represent a large number of volunteers. Even the level of Standing Committee engagement is not indicative of a robust system when one recognizes that 258 of the 530 individuals serving on standing committees come from only one organization. From a larger communal perspective, while a restructured board, may potentially limit some volunteer engagement on the board level, it does not foretell widespread governance loss due to the relatively small numbers of people actually involved. The case studies cited later shows that having one board need NOT limit volunteer engagement.<sup>22</sup>

<sup>22</sup> Several of the case studies indicate that volunteer engagement remained high even after consolidating boards.

- Budget Revenue

The analysis of agency revenues paints an equally multifaceted picture. While fundraising and other revenue streams remain a challenge for all organizations, the two charts below (Figures 5 and 6) show that, in spite of the larger communal issues, total agency operating income, aggregated across all the organizations appears to have grown.<sup>23</sup> Consequently, while many of the organizations may intellectually accept the global challenges, when it comes to their individual operations, most believe they annually generate enough revenue to mitigate significant decreases. This leaves them, essentially, whole in spite of what may be annual fluctuations.

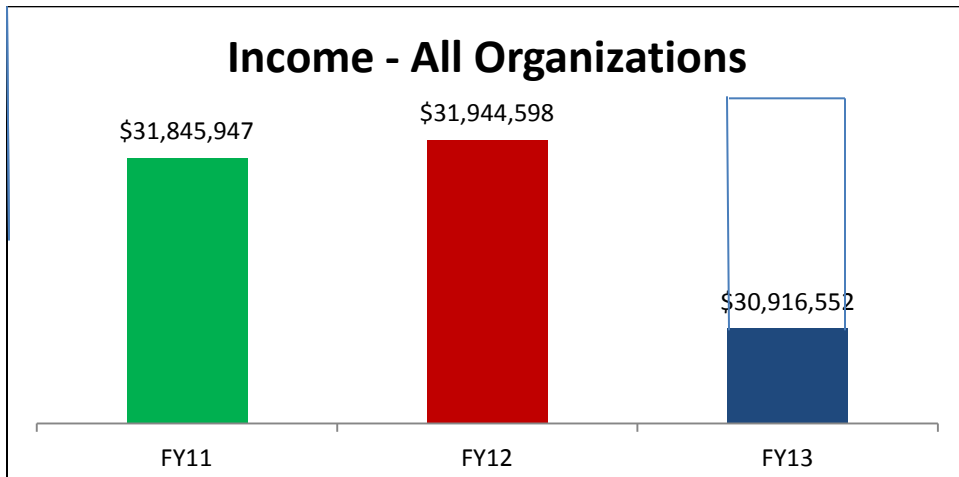


Figure 5

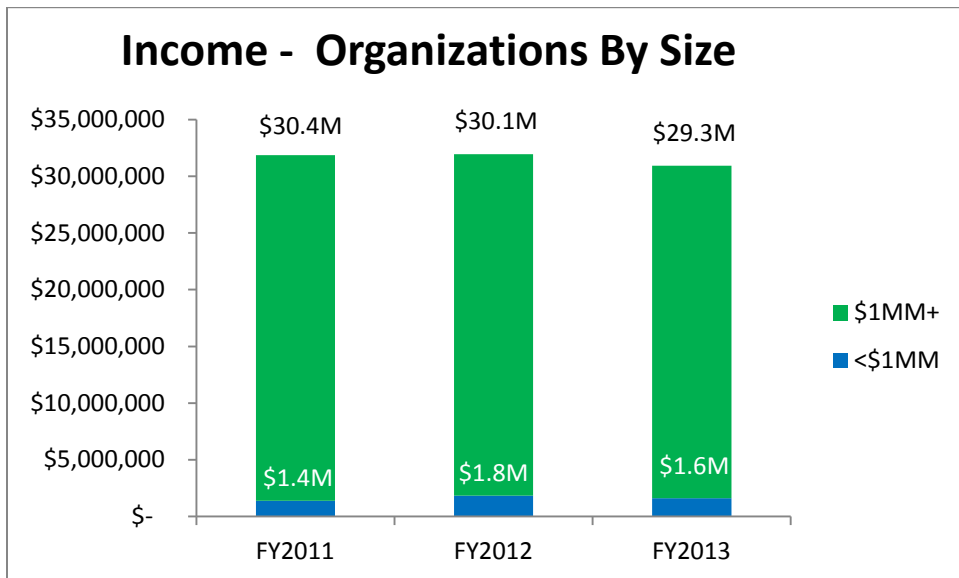


Figure 6

<sup>23</sup> Figures 5 and 6: FY 11 does not include OJCF; FY13 does not include BB Camp and PDX Hillel. The blue outline in Figure 5 indicates the total if FY12 revenues for these two organizations is included.

A closer review of this data however, depicts a slightly less encouraging picture. By hypothetically including FY12 revenues of the two organizations that did not report FY13 revenues (blue outline), the aggregated revenues still increased from the previous year, but by only \$300,000. Accordingly still growth, but far less. More importantly, we also found that of the ten organizations reporting FY13 information in this section, only six indicated increases, while four reporting decreases.

The manner in which one chooses to view these data help explain how the JPT Committee could come to its conclusions, as well as why there was initial resistance and lack of acceptance of the underlying issues. This also explains why complacency (and perhaps even denial of the real potential impact) is so widespread.

- Fundraising

Fundraising trends as presented in Figures 7 and 8 present an equally complex picture. On the one hand, the two charts present a picture of strong support from those board members who are one of the reporting agency's Top 50 donors, support from their Top 50 donors in general, and for several, solid financial support outside of the board. Conversely, these same charts suggest that some organizations may be overly dependent on top donors in terms of the high percentage of them on their boards. Considering that Board membership is such an integral element in donor engagement, this dependency can leave an organization constantly struggling to replace dollars, when board members transition off the board.

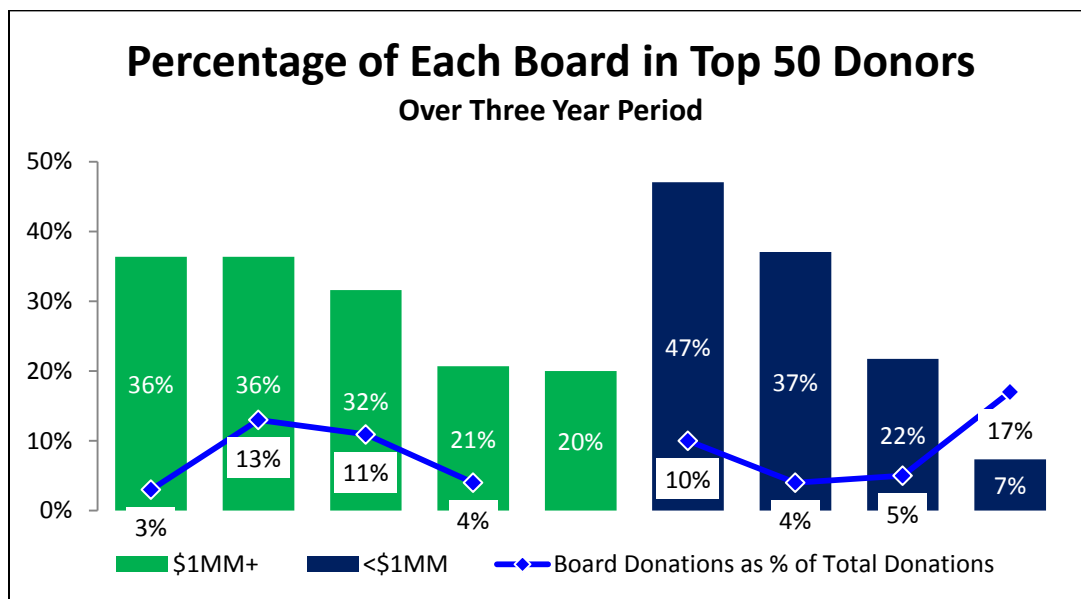


Figure 7

Surprisingly, the data also shows (Figure 8) that there is little duplication of top donors between organizations. This provides a clear understanding for the conflict between agencies both accepting the global communal issues, while also not seeing how these issues directly affect their organizations.<sup>24</sup>

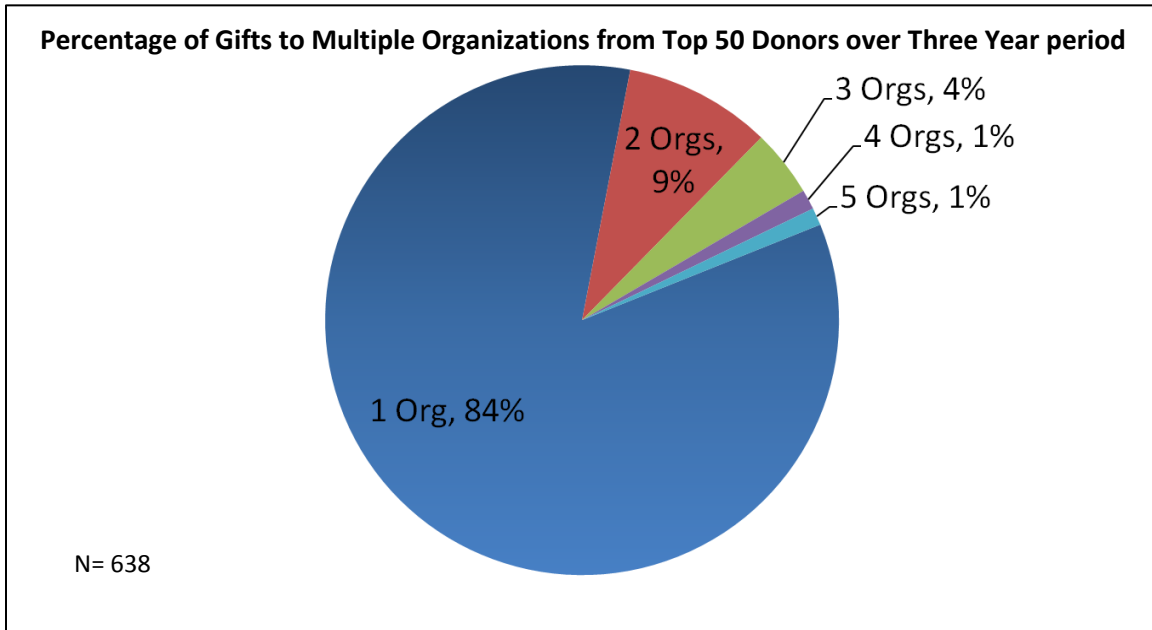


Figure 8

While the above chart may change slightly if we were able to combine giving units (individuals, spouses and foundations), the data clearly shows that for most of the organizations, they experience their top 50 donors as primarily “their donors” alone. In this scenario, larger communal issues and trends don’t correlate with their experiences. When we look deeper into the Top Donor data (below) however, we see a far more nuanced picture, and that the above chart is descriptive of a giving universe in which a majority (66% in 2013) of the top 50 donors give under \$5000 to that particular organization.

It is our assessment that many of the organizations don’t view the picture in this manner. They annually operate close to within budget, continually raise just enough funds and have a pool of volunteer leaders. The concept of donor fatigue, and losing donors, while widely recognized at a global level, simply is not resonating with any

<sup>24</sup> The Top 50 Donor data has certain limitations. Because donors were categorized by giving levels, YTY increases or decreases could not be analyzed. In addition, while attempts were made to combine gifts where appropriate (e.g., spouses), this was not always possible or appropriate. Similarly, gifts from foundations (even with the same names) and individuals were not combined due to potential consistency issues. There are indicators, however, that combining these gifts would not have significantly changed the findings.

urgency at the institutional level. As one interviewee emphasized: *“Ultimately, I don’t believe that the problems of the Jewish community have been portrayed accurately.”*

Just as importantly, when these same organizations look at the influence of their top donors, they see varying impact. For the largest of the organizations (\$1MM+) the impact, of at least their top five donors is measured (Figure 9) and not enough to create a sense of panic. For the <\$1MM organizations, however, the impact is potentially greater and the risk higher, if they regularly analyze their donor trends.

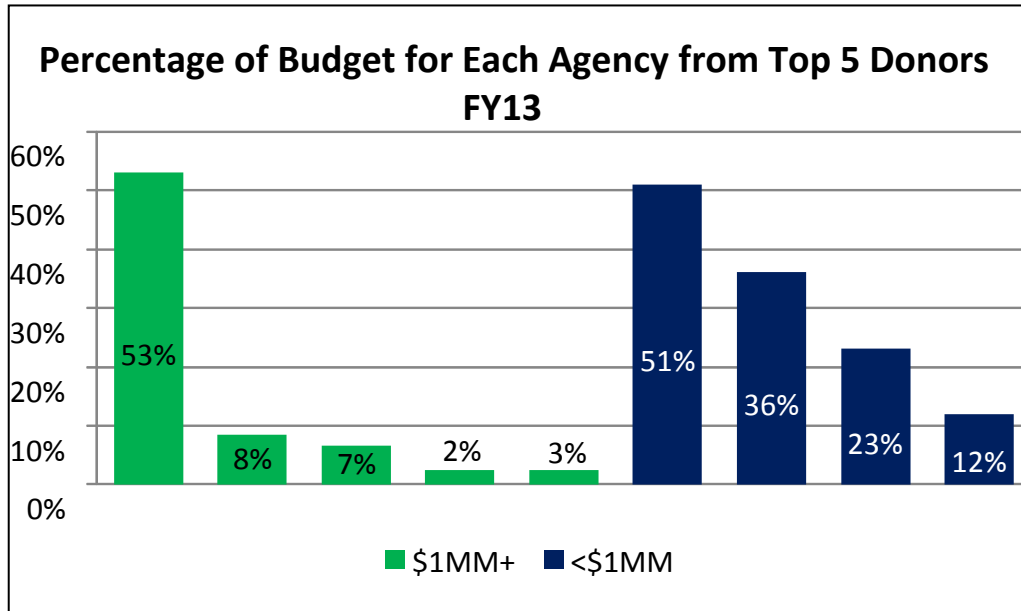


Figure 9

The following chart emphasizes this point, while also suggesting additional reasons that individual organizations may have rejected the JPT Committee’s premise. Figure 10 shows the diffusion of the aggregated Top 50 donors<sup>25</sup> in giving categories. From this data it is abundantly clear that, while the largest donors are the fewest in number (following traditional giving patterns), there is a preponderance of Top 50 donors giving under \$5000 (and even \$2500) but still making it into the Top 50 classification. This could well explain the strong sense of complacency that appears to permeate the community.

<sup>25</sup> Top 50 donor information was provided in giving ranges. In cases where spouses could be identified gifts were consolidated as one. In cases in which an individual may have given personally and then through a foundation, these were not consolidated for consistency reasons. As such, in some situations an individual may be counted as multiple gifts, but a review of the data appears to indicate this did not happen in a significant number of cases.

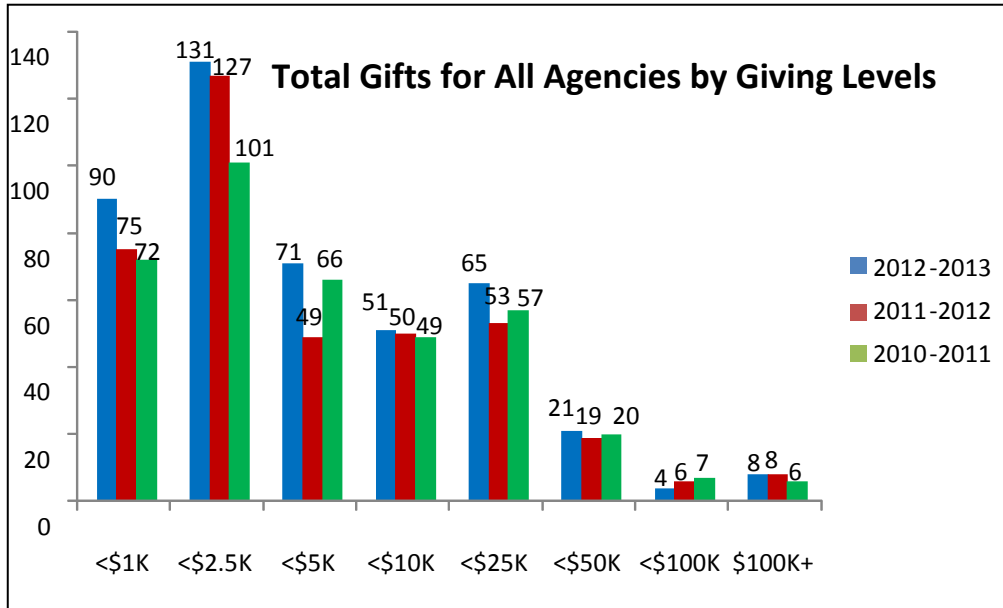


Figure 10

A closer examination of Figure 10 hints at further reasons why individual organizations may not be as concerned about donor fatigue and philanthropic trends as they should. Although donor churn rates could not be analyzed due to the manner in which the data was provided, philanthropic trends suggest that churn rates are highest on the lowest giving ends. On the positive side, while replacing any gift can be problematic, replacing a smaller Top 50 gift is significantly easier than replacing a lost five or six figure gift.

Figures 11 and 12 below further illustrate that, even though the risk of losing these lower gifts is higher for <\$1MM organizations, most could recover more quickly through budget changes or new donations due to a potential smaller gap. Nevertheless, we still should not discount the fact that the impact of losing any of these Top 50 donor gifts can be significant on any one agency, as well as the collective system.

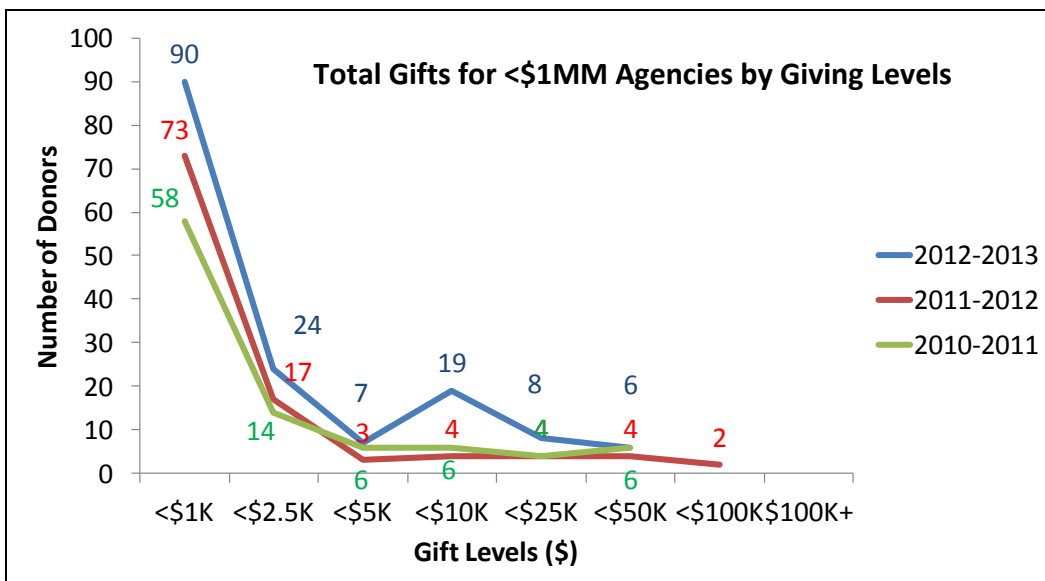


Figure 11

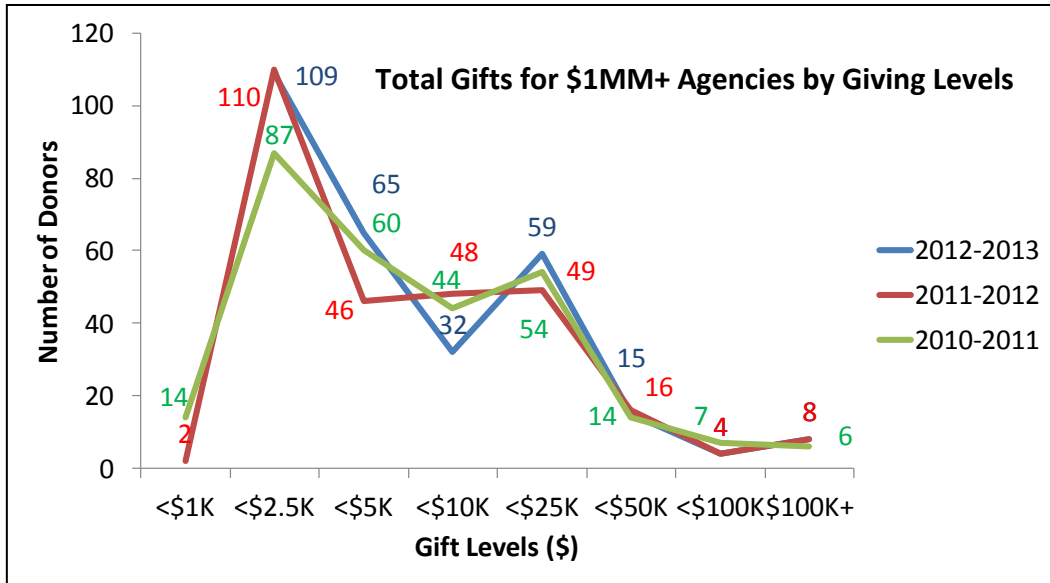


Figure 12

Figure 13 below, however, describes a far blunter picture that affirms the critical importance of the largest donors to each organization and the potential risks associated with dependency on them. For those organizations shown on the chart, a significant percentage of their total fundraising comes from just five donors each.<sup>26</sup> The loss or potential loss of these gifts should be cause for serious concern.

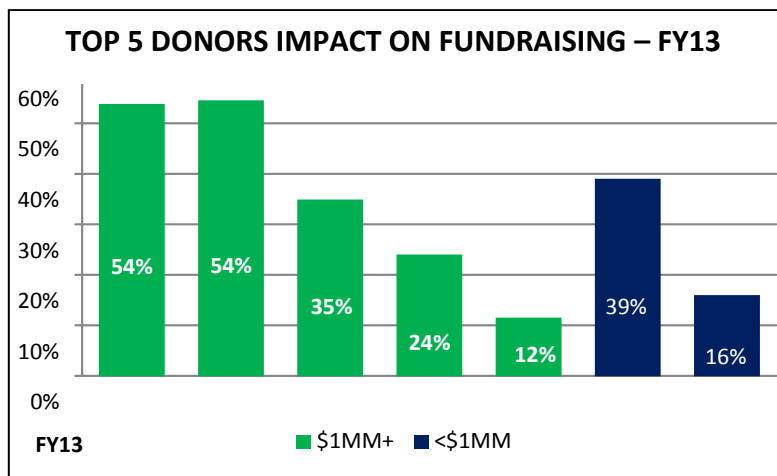
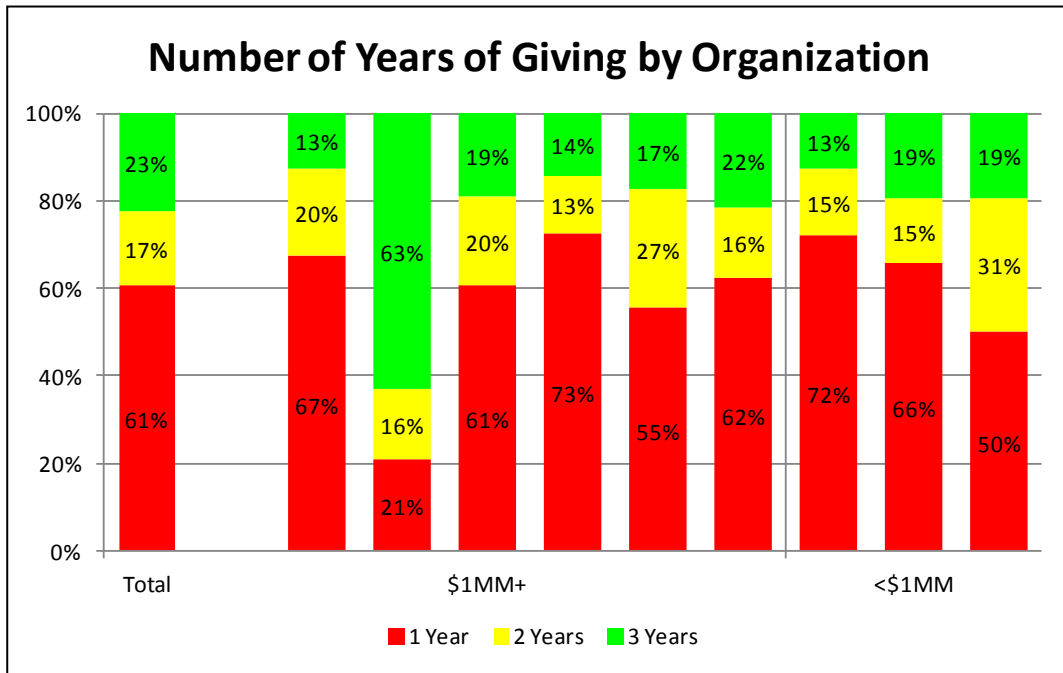


Figure 13

In addition to possible churn issues and high dependency on these top donors as a percentage of total fundraising, Figure 14 below appears to indicate that Top Donor retention may also be a serious issue. The data appears to suggest that organizations

<sup>26</sup> Three additional <\$1M provided data but their percentages were too small to show on chart. OJCF is not included due to their funding structure and MJDS is not included due to issues with form.

are experiencing considerable fluctuation even among their highest donors with few giving for multiple years.<sup>27</sup> This is not a healthy trend



**Figure 14**

Although the Top 50 donor trends describe a scenario that affirms that the agencies are experiencing many of the same donor trends that concerned the JPT Committee, it is once again easy to understand an agency’s denial and the sense of “it’s not impacting me”. The following charts (Figures 15 and 16) illustrate that while fluctuations exist in annual fundraising, most of the organizations have seen their fundraising rise and fall in fairly close spectrums over a three year period thus leading more to a sense of complacency than panic.<sup>28</sup>

<sup>27</sup> Due to the manner in which the data was captured it is possible that those donors who appear to have given for only one year could be repeat donors, but the basic issue remains.

<sup>28</sup> One organization in Figure 15 includes capital funds that were reported as operating income.

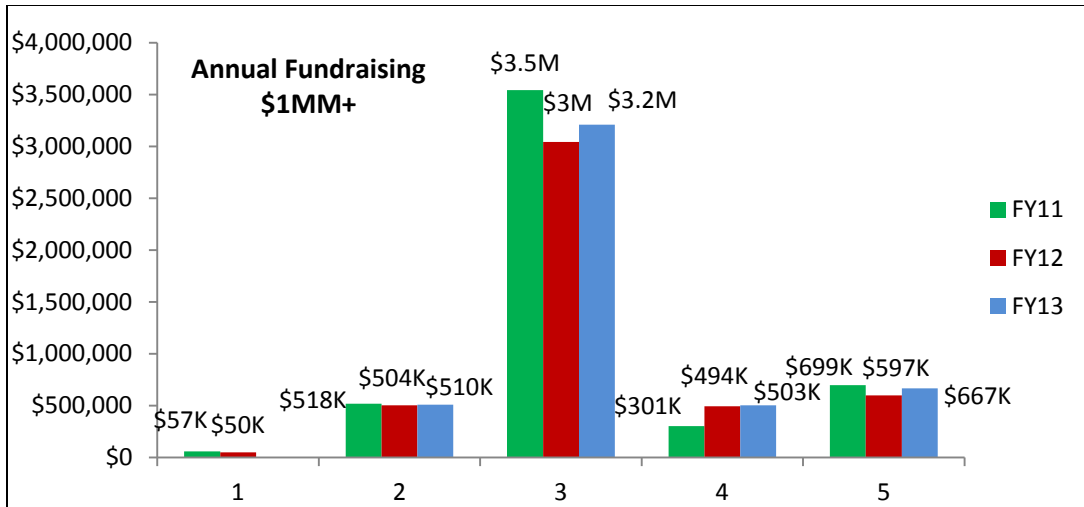


Figure 15

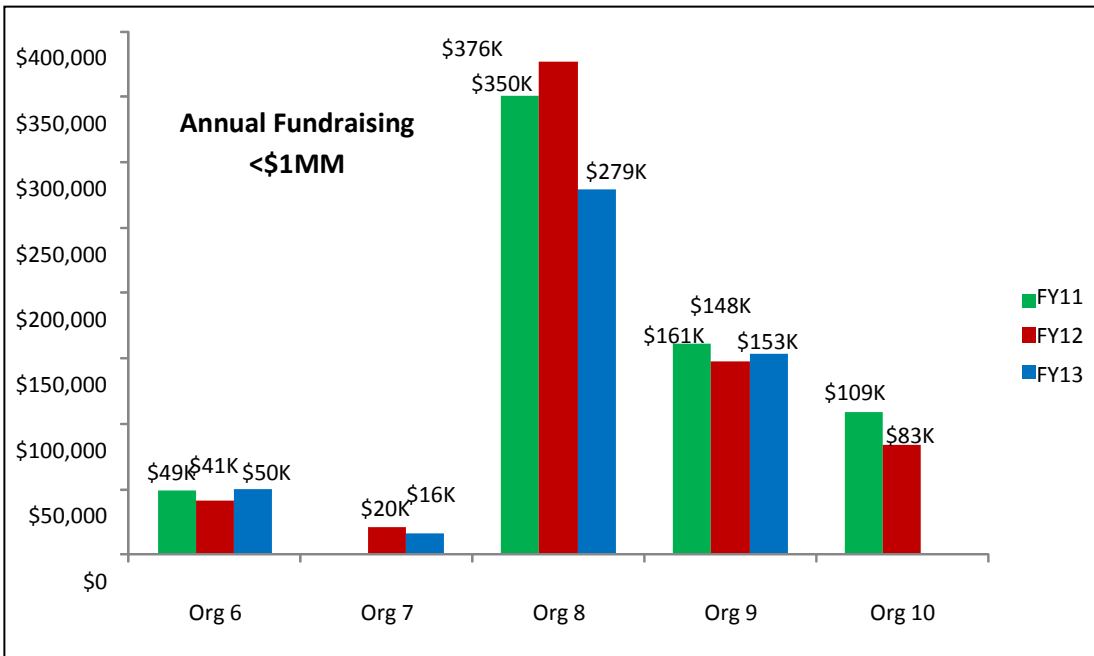


Figure 16

The above analysis demonstrates quite clearly a rationale (not excuse) for the strong disconnect with the issues raised by the JPT Committee. Putting aside the issues associated with the rollout and framework (which will be addressed below), the above data clearly suggests that for many of the agencies, the clear urgency of the issue did not resonate. As far as many, if not most, organizations were concerned, while there are clearly operational struggles that impact their performance, a review of their governance, budgets and fundraising presented a picture that could clearly obfuscate the larger communal challenge and perpetuate a sense of complacency.

While it would be easy to suggest that some of the agencies are in denial, this would be an oversimplification. The agencies in general recognize their challenges, but they do not see them as indicative of the larger communal issues. They acknowledge that the larger communal issues exist, but they do not see them impacting their organizations. Accordingly, they do not feel the urgency to react. 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 built into an urgency campaign.

#### KEY FINDINGS

- The data explains why agencies don't necessarily see how the global issues impact them, and conversely why these issues are, and will continue to negatively impact their operations.
- The community does not have a robust governance system in terms of total numbers, thus models that consolidate boards should not have a negative effect.
- Fundraising remains relatively flat across the communal spectrum. The large number of smaller Top 50 donors (under \$5,000) is cause for concern, as well as the potential loss of Top Donor gifts above \$5,000.
- The community's organizations appear to be complacent around these issues, even bordering on denial. This restricts their ability to confront their problems and develop broad-based impactful strategies.
- The organizations do not recognize (or accept) the urgency of the impact of these issues on them and the community.
- Before significant changes can be addressed, communal denial and complacency **MUST** be overcome.

#### JEWISH PORTLAND TOMORROW PROCESS

Our research revealed that much of the negative reaction has as much to do with the process that was undertaken as with the proposed model. Widespread feelings of mistrust, anger and resentment from the agencies and their supporters for not having been actively involved and given a voice from the onset of the project were shared in overwhelming numbers. These reactions have led to several beliefs about the JPT framework:

- Top-down takeover

The agencies and many of their supporters expressed that only one agency (Federation) was driving – and excluding them from - the process. They felt it was an immediate jump to a top-down, corporate solution. Though there is agreement that Portland has significant challenges, the agencies feel that the committee began with the perspective that they are doing a *“lousy job”* while they believe they are doing a good job. As one interviewee stated, *“the committee should have started by celebrating the good (e.g., donors are supporting them and clients are happy) and fixing the broken”*. This view, however was rejected by a significant number of interviewees who strongly expressed the opposite. These advocates see the system as so broken that it is in need of drastic change and fixing.

Multiple interviewees believe the Federation has a mandate to impose this, and they are nervous about their organizations or the organization they care about disappearing in what feels like a hostile takeover. If a model were developed to address the issues, they would want to see it built around consensus, not being imposed.

- “Bail-out”

Many interviewees believe that JPT is a response to the Federation’s problems and an effort to save that agency. These people believe that Federation is searching for relevancy and that JPT is their answer for how to create it. One interviewee expressed this feeling when she said, *“It feels like a vaccine solution – you vaccinate all the kids because one of them [gets sick].”*

- “Kingdom Building”

A surprising number of interviewees registered a strong indication that the primary purpose of the new framework was the Federation’s CEO desire to “build his kingdom”. Often these comments came across in a manner that sounded far more like a personal attack than from the perspective of management style. Interestingly, for a significant number of these same interviewees, there was a level of respect for the CEO as both a visionary, passionate leader and change agent. Juxtaposed to these attitudes were those who stated unequivocally: *“We hired this CEO to be the change agent we need.”*

Additional issues that registered strong reactions were also identified. These included:

- Interviewees expressed that the process appeared secretive and should have started with broader conversations to identify the problems in the community and collaborative forums to identify potential solutions. Others however felt that the only way to fix the abovementioned broken system was for a small group to create a “strawman” framework for consideration. In their view, a consensus driven process would do

nothing but generate talk but no action.<sup>29</sup> Nevertheless, although the process was perceived as less effective because it went against the norms of the community polity and involved no (or limited) outside discussions or collective buy-in process, it has generated a needed communal conversation.

- “Jewish NEWCO” conveyed a corporate structure, which was interpreted by many as a clash of cultures (corporate takeover vs. social sector collaboration).
- Donors threatened that if agencies did not get on board with the change to “Jewish NEWCO” the donor(s) would no longer contribute to them.

Coupled with these, was the lack of internal message alignment within the Federation. According to one interviewee who was deeply involved with the Federation allocation process: *“Allocations has intentionally tried to separate itself from JPT so we are a safe space for agencies because we don’t want them to feel threatened by what is potentially taking place.”* Despite this attempt, though, the above sentiments only affirmed many of the Federation-funded agencies own anxieties and hostilities that have developed in response to their annual allocations and the allocation changes that had been made over the past several years.

Interestingly, these reactions don’t necessarily correlate with the facts surrounding the Federation’s allocations history over the past five years. Although absolute dollars have decreased (and in some cases disappeared entirely), a review of allocation percentages affirms that to a larger extent the Federation has attempted to protect, as much as possible, the stability of local allocations.

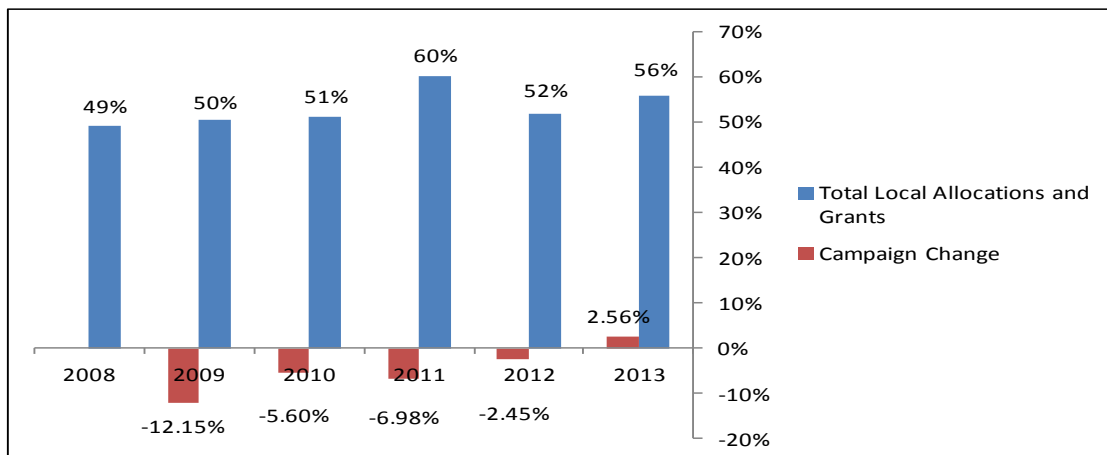
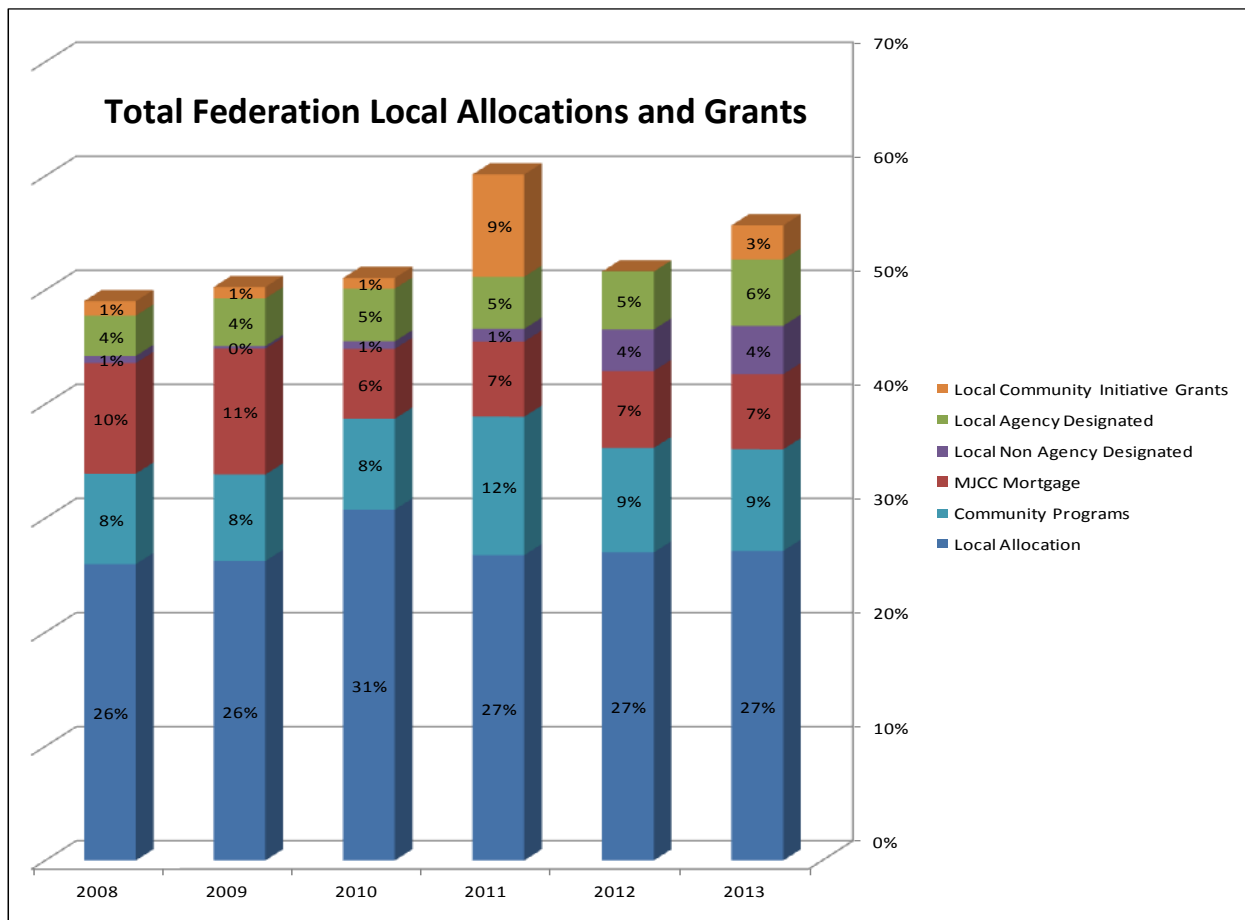


Figure 17

<sup>29</sup> The manner in which the initial process took place, did reflect a critical component of effective change - “assembling a group with enough power to lead the change effort”.



**Figure 18**

As Figures 17 and 18 above indicate, while the annual campaign has dropped four of the last five years, the percentage of dollars going directly to the local agencies as part of their “core” allocation has remained somewhat constant (average of 27.5%). Further, when additional allocated funds to the agencies are included, the percentage rises to approximately 54%. Thus, while absolute dollars to specific organizations may have decreased (or been cut entirely), the allocations committee appears to have worked to lessen the impact of campaign decreases on the agencies. This has not stopped, though, uneasy feelings, expressed as mistrust and resentment. These attitudes however, are not unique to Portland. They are, in many ways, reflective of the historic tension that exists in most communities between the Federation allocations as “right” vs. “grant” (which is one of each agencies largest single revenue source).

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 the proposed framework (even with “*the meat on the bones*”). While many felt extremely negative about the process, this did not stop them from being open to restarting the dialogue. Conversely, many saw the process that took place as critical and necessary for the community’s

future. Not only did it provide a strong voice for those who provide significant financial support for the community, but it also ignited the very passions needed to overcome complacency and fix the very real problems on the community's horizon. Portland's Jewish community is at a critical junction. For those who were angry and "hurt" by the process, they can focus on what took place, or they can recognize that an opportunity now exists to confront and collectively resolve the community's tremendous issues.

#### KEY FINDINGS

- The Jewish Portland Tomorrow process generated strong reactions that complicate potential next steps but still initiated a critical and imperative communal conversation.
- The Federation's allocation process may have inadvertently added to communal complacency by minimizing the impact of the loss of gifts (which were due to major donor deaths).
- Passions (both positive and negative) were ignited through the Jewish Portland Tomorrow process. These passions can now be mobilized to recognize the urgency of what is needed and create a bold and exciting vision for the future.

#### JEWISH PORTLAND TOMORROW FRAMEWORK

##### REACTIONS TO THE PROPOSED MODEL

Interviewees expressed that the JPT framework was presented as both a model that the community needs to or will implement and/or a big idea for discussion. The absence of clarity, coupled with what many (opposition and supporters alike) felt was a model without the details, created heightened reactions. Some agencies and constituents expressed that they could not rally around an idea that did not include a detailed business plan, nor were they able to see themselves rallying around a name ("Jewish NEWCO") that did not convey something exciting or good for the community – even if it was only a working title. They felt the process lacked thoroughness, not just in terms of the details but even in determining the structure itself, feeling that this idea may be good for some organizations but that the "all or nothing" approach lacked proper discretion. While there is no agreement whatsoever for exactly how JPT should be structured or which agencies would be in or out, there is a willingness by those who can move beyond the "trust issues" to continue exploring the ideas of functional consolidation and shared services.

While many of the reactions to JPT were driven primarily by the process itself, our findings also revealed many insights into what people and organizations think about the need for and structure of the model. These thoughts can largely be summed up through the exploration of several inherent tensions:

- No agreed upon sense of urgency  
As has been expressed above, in light of the manner in which local agencies view their daily and annual existence, a significant disconnect occurred with the rationale for the Jewish Portland Tomorrow framework. Clearly, while the committee understood the urgency of the matter, the remainder of the community did not feel the same urgency. As a result, many who heard or saw the presentations did not internalize the essential urgency needed to adopt, embrace and drive significant changes.
- Efficiency vs. enhanced Jewish life  
There is a pervasive feeling that there has been blurred messaging around the idea of JPT. Interviewees, including many of the JPT committee, were mixed as to whether JPT's purpose was about cost reductions through efficiencies or about enhancing Jewish life in Portland (and using the cost savings from developed efficiencies to fund these efforts). While a review of the materials and conversations indicated, even for proponents of efficiencies, a clear and unequivocal belief (with some exceptions) that JPT was ultimately about enhancing Jewish life, this was not "heard". What was ultimately driving the change was lost in both the manner in which the idea was discussed and the potential predisposition of those not supporting it to hear the message through a very negative lens.

As one interviewee pointed out *"Non-profits do not exist to be efficient; they exist to serve needs."* It was clearly expressed by interviewees that, while efficiency is undoubtedly a motivating factor in any sort of restructuring, most people are largely less concerned with whether or not there will be savings and more interested in what the impact of these savings will be. This is where much of the messaging appeared to get lost. Although JPT, to most of the committee, was not primarily about cost-cutting, but rather about raising and spending dollars more efficiently to best serve the community, the message that was interpreted by many was that it was solely about reducing costs, eliminating redundancies and creating a smaller institutional footprint.<sup>30</sup>

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<sup>30</sup> While many look at mergers and consolidation as a way to reduce costs and realize efficiencies, it is important to note, that rarely in the social sector (vs. the nonprofit sector) are significant savings ever realized.

- Vision

Even those interviewees who understood that the primary motivator of the JPT framework was enhanced Jewish life, felt that a clear and concise vision of what the community could look like (not structurally) was never stated or, if stated, not heard or understood. While there is concern and trepidation about the larger issues confronting the community (but not necessarily “my” organization), we also identified strong support and enthusiasm (albeit undefined) for the idea of a strong, vibrant and dynamic Jewish Portland that enhances people’s lives.

Within the community of those interviewed, though, there was not a unified vision of either what an “enhanced Jewish life” looks like, or more importantly, who should be the recipient of the services dedicated to enhancing their lives. Tension was expressed between a model that focuses primarily on strengthening the community and one whose primary goal is to broaden it. Many people reacted in favor of one focus or the other, but there was not agreement. The challenge for JPT with this dichotomy was that the model did not indicate a preference, nor did it articulate how this dichotomy would be addressed if JPT was implemented.<sup>31</sup>

The other challenge when thinking about the strengthening vs. broadening issue was the concern that in creating an organization that is designed to reach a broader crowd, it could actually reduce diversity by putting everything under one umbrella and thereby eliminating the uniqueness that can be achieved by stand-alone institutions.<sup>32</sup> Whether a broad-based coalition of the willing express a strong preference for one or the other, at its core, and at the forefront of any new model, needs to be a message of hope and impact. This is what can, and will help mobilize support.

- Hyper-specialization – “Big-Box” vs. Boutique

Associated, with tension between broad vs. focused engagement is the awareness of Portland as a city is that it is not about “big”, but rather small and specialized. Therefore, within the idea of Portland being about small, boutique and hyper-specialized, the JPT on the surface was perceived as not culturally fitting the community. There is concern that it feels impersonal. Conversely, JPT advocates, who have a clear picture of the framework, see it as the epitome of hyper-specialization of services rather than “big-box”.

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<sup>31</sup> The broad-based collaborative design of a communal vision will address many of these concerns. This vision, however can only take place after the community recognizes the urgency of the issues confronting its existence.

<sup>32</sup> See footnote 22

Paralleling this disconnect is the need to recognize that the younger demographic does not see engagement through institutional lenses, but rather, specifically through hyper-specialized activities. They are more self-focused and used to being able to get everything literally at their fingertips. Institutional (“big-box”) loyalty is not part of their psychological lexicon. As such, they have come to expect things to come to them as opposed to having to seek out. The current JPT model, while perhaps structured as a hub and spoke system, came across to many as the epitome of a Jewish “big-box” enterprise. It is not perceived as a model that can accommodate a desire for a more boutique and specialized feel.

- Centralization vs. Collaboration

Most interviewees agreed that working together has positive institutional and communal benefits. As we mentioned, there is a general openness to some form of change, collaboration and new models. The combined MJCC/PJA model is a model that is working so people see that there is some value to consolidation<sup>33</sup>. However, for those primarily connected to the agencies, they were still concerned about total centralization and if “they” would still exist.<sup>34</sup>

The idea of functional consolidation (the five pillars) which was an underlining principle for the JPT framework vs. institutional continuity, was never heard, embraced, understood, or accepted. Despite frustrations by some over a system that currently allows for decisions to be made based on protecting institutions, jobs, legacy commitments and donor pet projects, a significant number of constituents still expressed a willingness to consider models where the benefits of functional collaboration and centralization can be realized without everything going away by absorption into some large conglomerate. They want to explore not just an “*all in*” model but also something that would allow for “*some in*”, including exploring whether and how synagogues may fit into the JPT model.

- Who is in – who is out

While the initial framework presented various pictures of which partners could be involved, later conversations revealed a wide disparity of attitudes. As some saw it, every partner agency would be integrated into the structure (including synagogues in some fashion); others described the partnership as involving some but not others. The

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<sup>33</sup> This should not be understood to minimize the number of voices who questioned whether, in retrospect the MJCC should have been “saved,” and still question its value (other than as a home for PJA) and relevancy.

<sup>34</sup> Although no one specifically stated that they were concerned about people losing their jobs, the point was often raised that it was natural for there to be resistance because people might lose their jobs.

configuration of who was in and who was out was as varied as the people who described the framework. The result of this self interpretive picture is that the overall message of enhanced service through functional areas became lost in the discussion of which institutional partners could fit most naturally together and realize the most cost efficiencies and eliminate the most redundancies.

- Next Steps

Compounding the above was confusion about next steps. Various and competing views arose around whether the next steps should be continued and broad based communal discussions, small step shared services, or imposing the framework as presented. In the case of the first two, there was as much agreement as there was disagreement as to whether these would help move the community forward.

- Broad-based communal conversations: The rationale behind this is clear, and is an important element in any effective change process. Others feared, however, that these types of conversations would have the complete opposite effect and delay decision making until whatever momentum that existed was lost and complacency for the status quo returned.
- Small-step shared services: Throughout the discussions, the idea of creating a small number of initial shared services resonated. For advocates of identifying and implementing a small number of shared services, the logic was obvious. Not only would it work to overcome many of the trust issues, but it would create closer inter-organizational working partnerships. The concern expressed by some, however, was 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 and elimination of redundancies, and not about a big and bold vision of enhancing Jewish life.
- A vocal group of interviewees felt strongly that the most effective and expeditious strategy would be to impose the model on those whom the Federation deemed to best fit through either allocation or donor pressure. This option, is neither viable nor will it achieve any measure of success. For several of the smaller organizations, their allocations are small enough that linking them to this change could possibly result in them rejecting the funding. Similarly, an analysis of the Top 50 donors suggests that most of these donors are on the lower giving level of the spectrum. While donor pressure in some isolated cases may work, there is just as much a chance it would not. Similarly, for the larger organizations, while the Federation allocation may be the largest sum they receive from a single entity, many of these

organizations would continue to survive if these funds were eliminated.<sup>35</sup> In terms of donor pressure, the largest entities are potentially as susceptible to donor pressure as would be the Federation. While a particular donor may convey to an agency that their gift is linked to their participation in such a model, it is just as conceivable that passionate agency donors would take their frustrations out on the Federation.

#### KEY FINDINGS

- At the time of this analysis the community did not recognize or accept the urgency of the issue.
- There is broad support to see the JPT as a conversation starter and many of the current agency leadership expressed interest in further exploring shared services and functional consolidation.
- Multiple dichotomous issues (e.g., efficiency vs. enhanced Jewish life, vision, centralization vs. collaboration, etc) arose from the initial JPT framework that should not hold the community back, and can be resolved as the community moves forward.
- There is an absolute need for a real, and “communally generated” vision that will drive structural strategies, but only after the organizations recognize and accept the urgency of the situation.

#### SHARED SERVICES/CONSOLIDATION OPPORTUNITIES

In spite of apprehension surrounding the JPT model there is certainly an identified openness, (including agency leadership) to exploring in a serious manner potential models of shared services and functional consolidation (even though, there is not necessarily consensus on how to best structure this). Indeed, there was broad, and strong support (particularly among volunteers and donors of multiple levels) that the community could benefit from some form of shared services, collaboration and functional consolidation.

We also found that volunteer leadership was far more accepting of the potential for shared services, consolidation and mergers than were professionals. In fact, we learned that in several circumstances Portland’s professionals played a disproportionate role in whether mergers took place or were never actualized. This dynamic cannot be forgotten as the community looks towards its future.

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<sup>35</sup> Although if any agencies stopped receiving these allocated funds the impact would be significant.

Our analysis of the data indicated there are opportunities to reallocate current expenditures. Some interviewees were most intrigued by shared resources at the functional level. Back office collaboration was understood to have tremendous support and seems to be “low hanging fruit”. There is limited acceptance that the community could benefit from collective marketing and development efforts, but many people were skeptical about these as they may hinder the ability of agencies to connect and really brand themselves. What is obvious from the data (Figure 19) is that from a purely functional FTE perspective, multiple areas appear to have room for redeployment.<sup>36</sup>

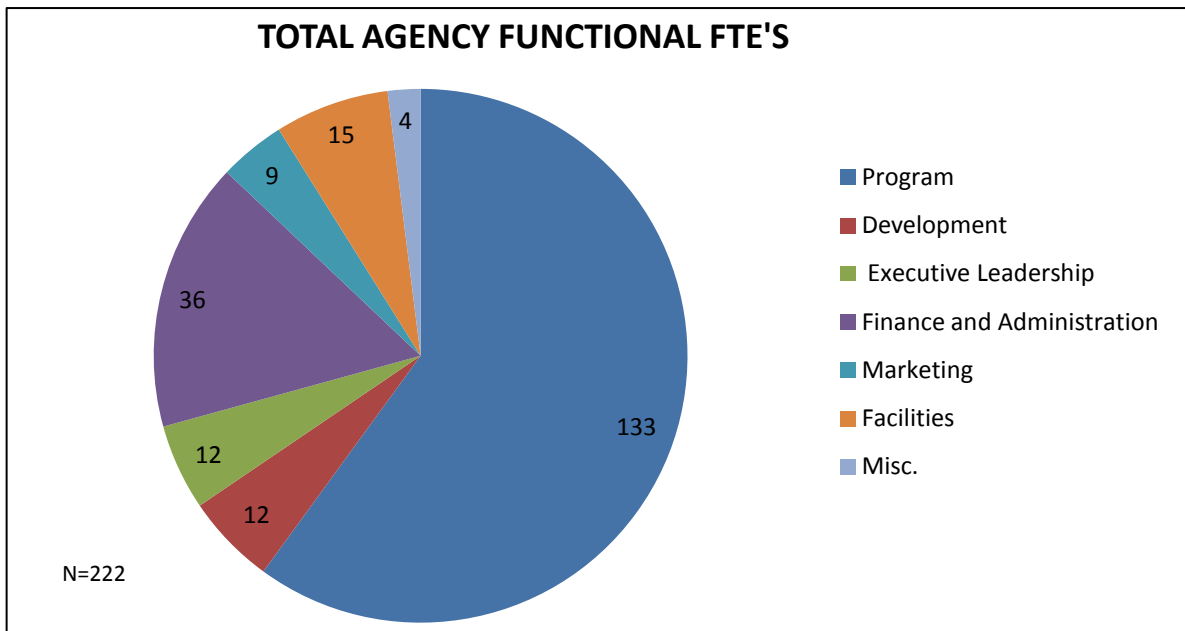


Figure 19

A quantitative analysis of the FTEs in the community by function indicates with a high level of confidence that there may be significant duplication in the areas of Executive Leadership and Finance/Administration. At the same time, given that one of the major community issues is fundraising, the question of whether twelve FTE’s is enough or whether staff with development responsibilities are deployed in the most effective manner is worthy of serious discussion and additional analysis.

While for some, a primary motivator of the Jewish Portland Tomorrow framework is cost savings,<sup>37</sup> a review of aggregated staffing costs by absolute dollars and percentages did not reveal anything out of the norm for the non-profit sector. Although duplicative savings within

<sup>36</sup> Does not include Cedar Sinai program staff. These numbers are based on functional percentages so that one person may be divided between multiple categories.

<sup>37</sup> Within the nonprofit sector it is accepted principle that non-profit mergers and consolidations rarely if ever result in significant cost savings.

functional areas could be realized, these savings would be, as proposed by the JPT framework, probably redeployed into other staffing areas or program enhancement.

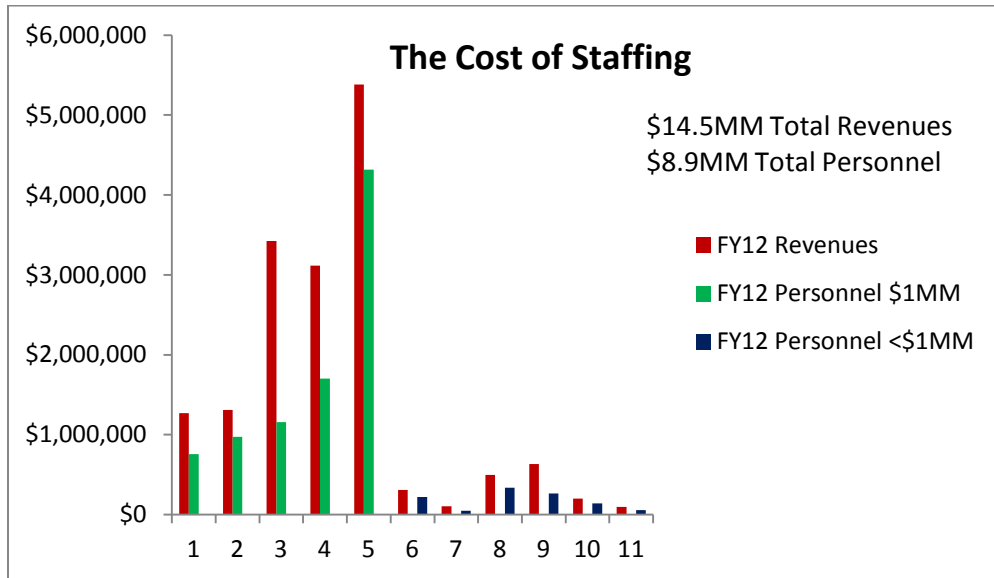


Figure 20

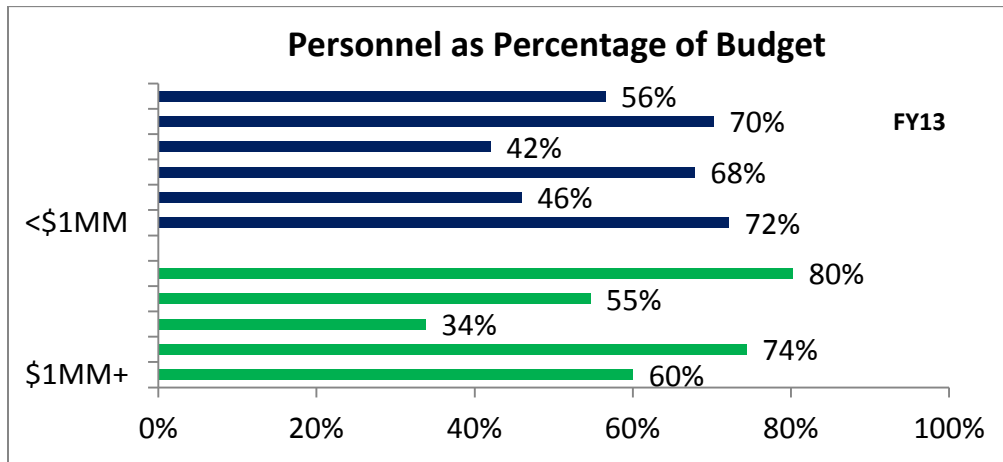


Figure 21

Especially when recognizing the unique products of several of the organizations, Figures 20 and 21<sup>38</sup> seem to indicate that none of the organizations are spending exorbitantly on staffing or utilizing an excess of its revenues on staffing. Eleven of the twelve organizations also indicated that they do not believe they have enough staff to meet their goals. They identified a need for at least 28 additional staff.

<sup>38</sup> Figures 20 and 21 do not include Cedar Sinai Park. In some cases, reported staffing costs may include benefits as well as additional personnel related items.

Although the assessment did not identify all open positions or evaluate salary levels, we did examine Executive Director salaries,<sup>39</sup> represented in Figure 22 below. At the time of this report, two Executive Director positions were open. Utilizing IRS 990 reported figures we were able to conclude that there is approximately \$350,000 of unused funds available. A consolidated functional model would enable these funds to be deployed elsewhere, without a loss of executive impact.

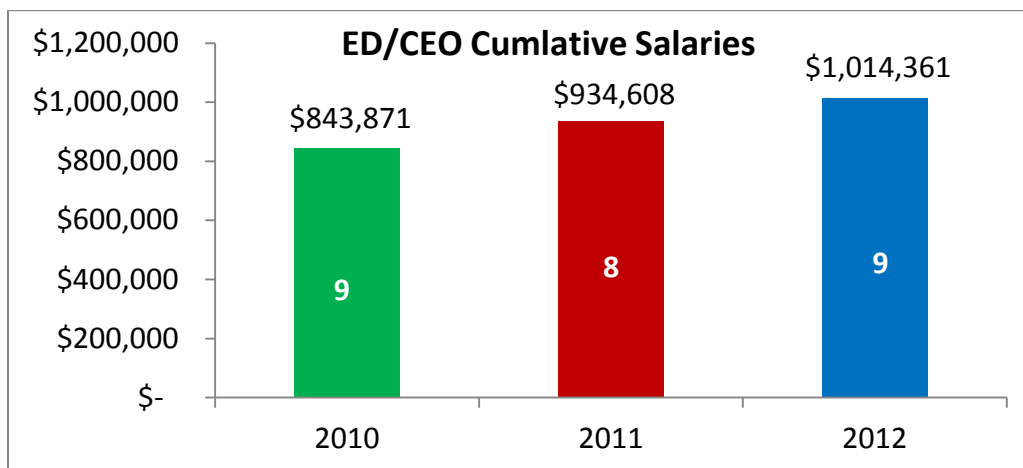


Figure 22

Facility utilization was also identified as an area that could generate stronger collaboration and cost efficiencies. Consolidated buildings and a shared campus of some sort was identified by a diverse group of JPT advocates and agency representatives as a good opportunity to be explored, especially given that so much of the community's facilities are leased (17,176 sq. ft.).<sup>40</sup> Although there is a wide range of views concerning the quality of the current facilities, nine of nine organizations believe they are using their facilities to their fullest capacity and five of nine believe they can only better utilize their facilities with significant costs. Multiple interviewees (including a high number of agency advocates) expressed the belief that shared spaces could generate improved collaboration and enhanced products. Others believed, however, that facilities consolidation would further decrease participation as it will make it harder for many community members to get to the locations.

<sup>39</sup> 2010 does not include BB Camp, PDX Hillel; 2011 does not include PDX Hillel, UO Hillel, MJDS and includes two JFGP salaries; FY12 does not include PDX Hillel, MJDS.

<sup>40</sup> The organizations reported that the total estimated value of property and equipment is \$34,522,716.

Ultimately, both those opposed to and those supportive of JPT<sup>41</sup> agreed there are efficiencies available. Throughout the course of the multitude of discussions the following were identified as areas in which there are self-identified perceived redundancies and efficiencies:

- Executive positions
- Finance functions (including synagogues)
- Facilities utilization
- Event planning
- Human Relations

Interviewees also saw opportunities, if the agencies worked together, to achieve excellence through the following enhancements to the system:

- Facility related collaboration (JFGP, OJCF, Melton, JFCS, PDX)
- Finance
- Programming
- Collaborative fundraising
- Leadership development
- Development positions

#### **KEY FINDINGS**

- Volunteer leadership is more willing to critically explore different models than professional staff which frames next steps since there have been cases in which professional staff were the primary obstacles to adopting new models and strategies.
- Opportunities exist for strategic expense reallocations and the elimination of redundancies, including staffing and operations. Currently over \$350,000 is available from CEO/ED open positions which can be utilized differently, if the community is prepared to capitalize on new ways of thinking.
- Select key agency leadership is open to discussing potential shared-services and functional consolidation models.
- While shared-services are a “low hanging fruit” and beneficial, they can also stop communal momentum unless they are structured as a path to a broader and more impactful strategy.

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<sup>41</sup> Pockets of resistance to ideas generated out of the JPT exist, and while they should not be ignored, they can be marginalized in appropriate and respectful ways.

## IMPLEMENTATION CHALLENGES AND OPPORTUNITIES

Based on the aforementioned findings, the implementation of a collaborative/consolidated functional model **can** be accomplished. For the most part there is agreement around the central issues impacting Portland’s Jewish community. While these have not yet been fully internalized by many associated with the agencies, large sectors of the community clearly recognize that changes need to be made (red circle in Figure 21). The primary challenge is that there is an overwhelming sense of complacency within the agency sector and many of the most ardent supporters largely believe “their” organizations are fine (blue circle in Figure 23).

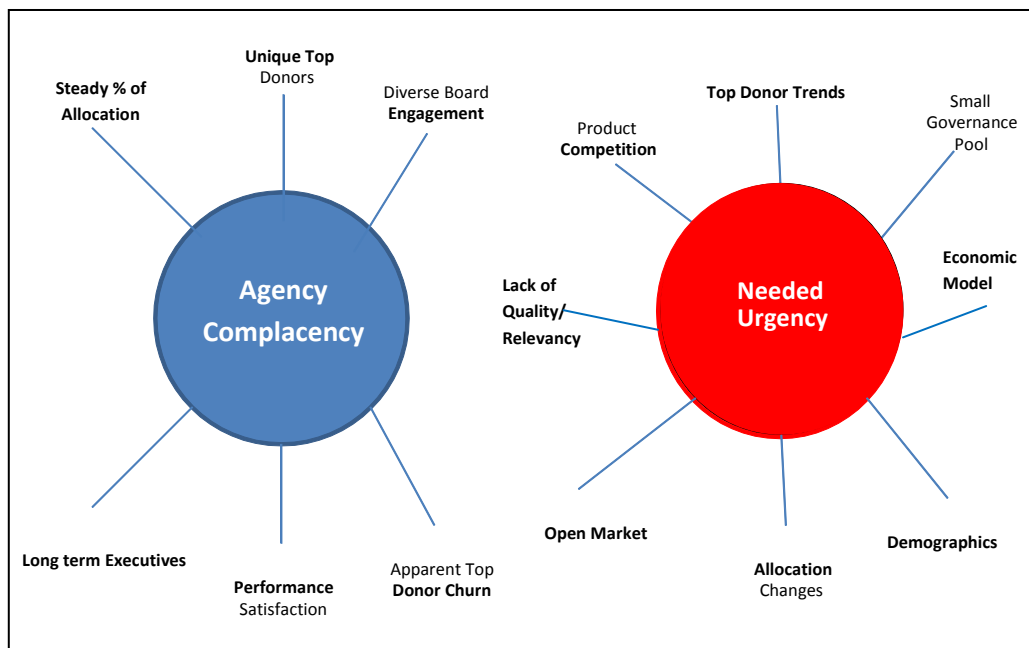


Figure 23

Beyond overcoming collective complacency, there are other challenges that absolutely need to be surmounted before a new JPT framework can be actualized:

- The agencies (plus ideally synagogues and non-affiliated partners) need to recognize success can only be achieved when they see that these efforts are focused both on the greater good of the community, as well as them, and as a result do not impede the efforts through protecting their turf.
- As was learned in the Orange County merger (see below), the work only gets done when those doing the work agree that the “only way to work together, is to work together.” There must be a joint commitment to find collective solutions.

- While increasing the numbers of supporters is critical, for this effort to succeed, the community needs to set aside its “egalitarian” nature and accept that the early drivers of these efforts must be those who have the ability to influence significant change.
- Form must follow function. Although discussions around specific areas such as governance structures are important and speak to the core of community concerns, structural discussions must come later. These can easily become distractions to the larger issues associated with urgency and vision. The concept, as expressed by many, of needing “meat on the bones” is essential to any model’s success. Nevertheless, if “meat on the bones” discussions take place too soon, they can easily hijack the momentum and trap the community into debates about structure and costs.

Portland’s Jewish community has the opportunity to enhance Jewish life. Through the initial work of the JPT Committee, and a strong coalition of 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.

In working collaboratively in this manner, an exciting vision can be generated that has the capacity to not only excite donors to give, but to increase their giving.

Portland’s Jewish community has the opportunity to reinvent itself. Based on its unique qualities, it is poised to explore and create new and innovative strategies that can and will impact and enhance the lives of its Jewish citizens. To do this, however, the community’s organizations (not just those funded by the Federation) must recognize that rather than being a community that is growing, Portland is in fact a community in decline. If it can accept this view, it can overcome its collective complacency, embrace a real sense of urgency, and create, through a broad-based process, a vision that will inspire and drive the changes needed.

#### KEY FINDINGS

- Organizational leadership (including synagogues) is operating in a complacent manner with no sense of urgency or a need to change even though the community is experiencing decline.
- There is a strong recognition from select agency leadership that structural changes can benefit the community.
- A multi-phased ever increasing broad-base effort needs to be implemented that will help overcome complacency, create a vision and drive the changes needed to combat and overcome communal decline.

## SECTION 3: CASE STUDIES

As part of our assessment, we identified four specific cases studies of communities that resonate with what Portland has begun discussing. The below examples represent a sub-set of a much larger group of integrated models across the United States.<sup>42</sup> While each community is unique, these models have less to do with community demographics and economic bandwidth, and more to do with exploring the why and how of the collaborative structures they developed. Each model also demonstrates that even with certain similar traits, there are multiple different models that have been developed and can be developed moving forward.

### ORANGE COUNTY, CA (FEDERATION AND JEWISH FAMILY SERVICE)

#### HISTORY

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In 2009, the Board of Jewish Family Service (JFS) approached the Board of Jewish Federation of Orange County (JFOC) for financial support and strategic planning assistance as a result of the financial difficulties they encountered during the recession. JFOC convened a taskforce with representatives from both Boards and engaged a local community member with corporate consolidation experience to evaluate the situation and propose solutions. Three options emerged:

1. Let the remnants of JFS fail and build something new
2. Award a large grant to increase financial support in the hopes that JFS would find a way to support itself
3. Form a strategic alliance whereby each organization would retain its own Board and legal tax status, but unite under one name and divide the responsibilities. The finances, fundraising, and marketing for both organizations would become the responsibility of Federation, and social service delivery would become the sole responsibility of JFS.

In June 2010, Jewish Federation Orange County and Jewish Family Service of Orange County formed a strategic alliance and hired a management consultant to facilitate the consolidation. The process took six months, with regularly scheduled meetings, ongoing team building, and a promise to live by the rule that “the only way to work together is to work together.” From this process emerged a new core purpose that continues to guide them – “more services to more people more efficiently.”

In January 2011 a full merger to be called Jewish Federation & Family Services of Orange County (JFFS) was approved unanimously by both Boards.

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<sup>42</sup> See Addendum F (JCC/Federation integrated models, Federation/Foundation models, Federation/JFS models).

## CURRENT MODEL OVERVIEW

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Today, Jewish Federation & Family Service of Orange County is one 501(c)3 non-profit organization, and one Board with a mission to “bring together the people, the partners, and the resources to care for people in need, to build a vibrant community and to sustain and enhance Jewish life.” JFFS shares one professional team, one data management system and one office space on the same campus that is also home to the Merage JCC, the Jewish Community Foundation, the Bureau of Jewish Education, Tarbut V’Torah Community Day School and a large Jewish pre-school.

JFFS has six Community Partners to whom they allocate annual core operating grants and with whom they interact strategically to advance their missions. These Community Partners are the Bureau of Jewish Education, the Hebrew Academy, Hillel Foundation, the Jewish Community Foundation (does not receive core grant), the JCC and Community Day School. Some joint initiatives include a new Legacy Giving program, the Maccabi Games, an annual Israel Expo that hosts 10,000 people on Tarbut V’Torah soccer fields, and the BJE Educators Association.

## LEADERSHIP AND GOVERNANCE

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JFFS has one President and CEO – Shalom C. Elcott, one senior management team and a fully integrated staff. It has one Board of Directors who, along with its committees, provides “strategic planning, financial and program oversight, and insures that donor dollars are invested wisely to deliver first-class services and programs.”

The process of moving to one Board was seamless and celebratory, launched with a special program in January 2011. At 5:00 pm, each Board met separately and voted unanimously to merge; they joined for dinner, and then conducted an Annual meeting. Since then, Board and committee involvement, as well as volunteer engagement for JFFS and its Community Partners has continued to increase and strengthen.

## FINANCES AND FUNDRAISING

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JFFS is a program and service providing organization as well as a fundraising organization. JFFS has one budget that is proposed and planned by the senior management team and approved by the Board. It has one fundraising strategy that is developed by the campaign team, and one data management system to coordinate donor information and solicitation. Since the merger, fundraising and government grants have continued to increase. From 2005 to 2013 JFFS grew their campaign from \$2 million to \$7 million. For the seventh year in a row, JFFS has been the only Jewish Federation in a western state to consistently grow its campaign, and for the second year in a row they achieved a double digit percent increase in their Generations Fund. Primary

fundraising efforts go toward the Generations Fund from which JFFS awards core operating grants to all Community Partners except the Jewish Foundation. In order for a donor to make a restricted contribution, JFFS first requests a contribution to the Generations Fund.

In conjunction with the merger, JFFS created a second website, "FamilyServicesOC.org" for two purposes: 1) to promote the Family Services brand as the social service arm serving all people of Orange County; and 2) to remove the misconception that JFFS only serves Jews. With their dedicated focus on social service delivery, Family Services currently reaches close to 5,000 individuals and families each year and benefits from a steady increase in government funding.

JFFS has also achieved remarkable program success since the merger. Specifically, in 2009 (pre-merger), the Silver Streak Transportation Program for senior adults provided 2,025 rides and in 2013 provided 17, 876 rides. In 2009 (pre-merger) Adopt a Family Program served 60 families and raised \$12,000 and in 2011 they served 112 families and raised \$66,000. In addition, JFFS gave \$80,000 toward home care assistance in 2009 and in 2012 they gave \$260,000.

#### CHALLENGES MOVING TO CURRENT MODEL

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1. Consolidating data management system
2. Alleviating fears of both organizations losing their own identity
3. Blending two very different organizational cultures
4. Moving from adjacent offices to one open office suite

#### SUCCESS AND IMPACT

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1. Rebranded JFFS under one unified message with no interruption of services
2. Built one collaborative, respectful team from two very different organizational cultures
3. Garnered the support of most major funders
4. Enabled Family Service to focus on their strength of social service delivery
5. Created one dedicated Board of Directors
6. Hired a first-time Clinical Services Director
7. Achieved economy of scale that could not have been achieved as separate legal organizations
8. Strengthened and grew programs, services and fundraising
9. Created better, more efficient financial accounting
10. Secured greater corporate and government funding aligned with the mission of Family Service to serve all people, not just Jewish families
11. Moved to a mobile platform pledging system in 2013
12. Completed a two and one half year strategic planning process to inform future direction of JFFS, uncovering the need to focus on the continuum of engagement across the age spectrum

## HISTORY

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In the mid-1980's the Endowment Fund of the Jewish Federation of the East Bay evaluated their beneficial position of having a significant growth in endowment funds – mainly from an increase in bequests. The Federation leadership hired their first professional to manage these funds, and in the course of making organizational changes, decided to separate the Endowment Fund from the Federation. In 1988, the Endowment Fund became its own 501(c)3 and changed its name to The Jewish Community Foundation of the East Bay. Since 1988, the Foundation, comprised of supporting foundations, donor advised funds, agency funds, designated funds, endowments, and unrestricted community endowments grew from a few million dollars to \$121 million.

## CURRENT MODEL OVERVIEW

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The Jewish Federation and the Jewish Community Foundation are two separate 501(c)3 organizations. While separate legally, they function operationally as a one integrated organization, sharing all support departments and personnel including administration, development, operations, marketing, finance, and community impact.

## LEADERSHIP AND GOVERNANCE

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Staff: The Jewish Federation/The Jewish Foundation of East Bay has one CEO, Rabbi James Brandt. Reporting to him are the Foundation Executive Director (Lisa Tabak), the Director of Development (Joanne Neuman), and the Federation and Foundation CFO/COO (Elizabeth Carey). These four professionals, along with the Director of Communications (Kevin Vickery) and the Senior Director of Community Impact (Dana Sheanin), comprise the management team.

Lay Leadership: The Federation and the Foundation each have their own Board of Directors. Each president has a seat on the other's Board and the CEO staffs both Boards. Typically a Board member will serve on the Federation Board and then graduate to the Foundation Board, which also recruits those who have funds and/or legacy commitments. Each organization has its own Board meetings, although recently they started to schedule meetings on the same evening with a joint learning session in the middle to encourage inter-Board relations. The two Boards regularly collaborate, especially to identify effective and appropriate Board members so they do not recruit the same person in the same year.

## FINANCIAL STRUCTURE, BUDGETS AND DEVELOPMENT

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The Federation and the Foundation maintain two separate budgets, but many line items are amortized across organizations based on the proportion of their usage. This applies to personnel and to other support departments who serve both organizations. The Foundation pays a management fee to cover rent, IT, phone, utilities, other overhead and insurance. The management team works together to create the annual budget and fundraising goals. The CEO, Foundation Director, and Development Director have weekly meetings to coordinate the annual campaign, designated campaigns, legacy giving, Foundation fund development, major gift solicitation, and other aspects of their development strategy. There is one quarterly impact report that highlights the work of each organization.

## BENEFITS OF MODEL

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1. There are efficiencies, cost savings, and operational benefits to a shared infrastructure.
2. There is one development strategy, one database and the two organizations share donor history, information, giving habits, and existing Foundation funds.
3. Having a “separate-but-also-together” model is flexible and allows for a customizable marketing and communication strategies to individual donors and agencies. To pro-Federation donors and agencies the Foundation can boast their integration, and to those less inclined to support Federation the Foundation can focus on the separate legal status.
4. Major funders enthusiastically support this model as the “best of both worlds.”

## CHALLENGES WITH MODEL

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1. Two separate Boards can create redundancy, inefficiencies, communication gaps and duplication of effort.
2. There is a modest financial cost associated with two 501(c)3s - primarily due to separate tax returns/ audits.
3. Cultural differences between two organizations can promote friendly competition and inhibit collaboration.

## AUSTIN, TX (FEDERATION, JCC, JFS)

### HISTORY

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Historically Austin has had a central Jewish community organization since the 1970s, and a Jewish population of approximately 4,000. In the late 1980s the city of Austin experienced enormous growth, along with its Jewish community – not only in population but also in wealth. In 1992, Michael and Susan Dell purchased a 40-acre site, launched a fundraising campaign to create a center for Jewish life in Austin, and donated the land to the Jewish community. In 2000, the Dell Jewish Community Campus opened and the new-age entity called the Jewish

Community Association of Austin (JCAA) was born, integrating the (until then) small Jewish Federation, Jewish Community Center and Jewish Family Service. The new organization hired a new director and full staff of 100 plus. By 2005, the JCAA succeeded in launching a full-service JCC and retained the traditional JFS model, but the Jewish Federation essentially had disappeared. To rebuild Federation with a focus on philanthropy and community development, the JCCA Board hired Jay Rubin, who brought to Austin executive experience from Hillel, Federation and JCCs, to be the second CEO of the JCAA. The Dell Jewish Community Campus today is home to the Jewish Community Center, the Jewish Federation, Jewish Family Service, Congregation Agudas Achim (Conservative), Congregation Tiferet Israel (Orthodox), Temple Beth Shalom (Reform), Congregation Kol Halev (Independent/Progressive), Austin Jewish Academy, JCC Early Childhood Program, and the Jewish *Outlook* newspaper. The Jewish population of Austin, estimated at 18,000, is expected to double over the next 20 years.

#### CURRENT MODEL OVERVIEW

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The Jewish Community Association of Austin is a single 501(c)3 non-profit comprised of three separate but collaborative divisions. The launch of the Jewish Foundation of Austin and Central Texas (JFACT) will add a fourth division later this year. The JCAA shares one campus, one staff, one CEO and one corporate identity. Each of the divisions currently retain their traditional legacy brands, and along with the Jewish Outlook newspaper function collectively as one integrated community organization. Their corporate identity is JCAA, but their public face is their divisions. The JCC focuses on programming across multiple age groups. The Federation coordinates philanthropy and community development philanthropy. JFS delivers social services. For marketing purposes, the JCAA website keeps the traditional logos of each division to help newcomers and lifelong Austin Jews stay connected to familiar brands. The JCAA, together with the area congregations, schools and community organizations, have a mission to “enhance the quality of Jewish life in the greater Austin area and around the world through community, philanthropy, education, social service, culture, spirituality and wellness.”

It is important to note that the non-synagogue land and buildings on the Dell Jewish Community Campus are owned by DJCC Development Corporation, a separate 501(c)3 non-profit, which was created to hold the JCAA assets. The DJCC has no liability to run the summer camp or pre-school; they just own the property and lease it to the JCAA for \$1/month.

#### LEADERSHIP AND GOVERNANCE

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Staff: The JCAA has one Chief Executive Officer, Jay Rubin, and three other senior executives: Arlene Miller, Chief Philanthropy Officer; Shelly Prant, Chief Programming Officer and JCC Executive Director; and Laurence Statman, Chief Financial Officer. It has one fully integrated

staff that provides the back office support including administration, HR, marketing and communication, fundraising, programming and community outreach. Each of the divisions focuses on a particular JCAA strategic goal and provides that support to all JCAA divisions. For example, JFS has 4 full-time staff that only focus on social work. Their back office support is completely provided for by the JCAA as a whole.

*Lay Leadership:* The JCAA has one 30-person Board of Directors that rotates in a staggered manner every two years and is organized around the five JCAA core values as stated in the strategic plan: “community, Jewish culture and education, philanthropy, caring and Israel/worldwide Jewry”. The eight vice chair positions on the Board (governance, health/wellness, caring/JFS Cabinet, philanthropy, community outreach/engagement, Israel/world Jewry, Jewish culture/education, and community relations) are related to the five JCAA core values, while the fifteen at-large directors are organized around the divisions, functions, operations, and programs. The Chair, Chair-elect and Immediate Past Chair of the Board, along with the Treasurer and the four Chief Professional Officers of the JCAA work collaboratively as the top level decision-makers for the organization. Board meetings are focused on the big picture and on the core values not on the details of each division.

*Volunteer Engagement:* Volunteer engagement has continually increased since the formation of the JCAA in 2000. Each division has a cabinet of volunteer leaders who works closely with the staff to achieve their goals. Most volunteer work is organized by projects and committees, creating a culture in which volunteer engagement is valued at every level, not just at the board level. Volunteers are identified and recruited to participate in areas of personal interest so their level of satisfaction is high and burn-out is low. In addition, volunteers focus on creative thinking, being ambassadors, welcoming newcomers, and connecting people to each other and to the organization.

## FINANCIAL STRUCTURE AND BUDGETS

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The 2013 JCAA budget was \$11.5 million with about half going to salaries. The JCC has the largest budget of the four divisions followed by Federation. On the income side, philanthropy brings in 25% of the revenue and the rest comes from membership, pre-school, programs, camp, rental and newspaper advertising. The JCAA has one database shared by all the divisions so donor information is consolidated and coordinated.

The JCAA distinguishes between philanthropy versus fee-based revenue and expenses (PvF). The organization is currently considering a major restructuring of its allocation process because by the time they begin allocating funds the internal budget of the organization has already been more or less set with the fiscal year and annual campaign on a calendar year basis. Since roughly 75% of their budget is internal, the JCAA is moving toward a system by which the

finance committee will determine the annual budget including fundraising expenses, and the allocation committee will focus on external allocations, such as JFNA (JAFI, JDC etc), Hillels, and day schools.

Jay Rubin supports the integrated model not only because of its cost efficiencies, but also because it reduces duplication and enhances collaboration. Staff and volunteer “silos” can and do emerge from time to time, but they are nothing like the Federation-Agency conflicts over dollars and roles in many traditionally-structured Jewish communities. “Austin’s growth in people, dollars and participation every year also helps,” Rubin maintained.

The JCAA is a complex organization that continually evaluates itself to meet the needs of a growing community. The following are some of the areas the JCAA measures for success: revenue, expenses, website usage, participation, quality of professional and lay leadership, volunteerism and satisfaction, membership, engagement, newcomer involvement, and philanthropy.

AKRON, OH (FEDERATION, JCC, JFS, DAY SCHOOL {SYNAGOGUES})

## HISTORY

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In 1994, the Akron Jewish Community Federation engaged in a long-range planning process to address the challenges confronting their Jewish community - decreasing population; changing demographics; weakened commitment to Jewish life; shrinking finances; separate, competing Jewish institutions with duplicate staff; and no common programming, service delivery or communication. As a result of the long-range plan, and in light of his visionary leadership and knowledge of other Jewish communities and Federations, the Executive Director of the Akron Jewish Federation – Michael Wise – authored a white paper, *Akron 2000 – Redefining the Jewish Communal Structure (1996)*, which laid out a radical idea of creating a new consolidated entity called the “Center for Jewish Life” (CFJL). In response to this white paper and aligned with the goals and objectives from the 1994 long range plan, 24 professional and lay leaders representing all of Akron’s Jewish agencies, synagogues and Federation came together to form Project Kadimah with one, clear goal - “to design a coordinated delivery system of services to strengthen the capacity of Akron’s Jewish community”. In February 1998, after one year of meeting and designing, the Project Kadimah Steering Committee hired Amy Morgenstern of Main Stream Enterprises to facilitate the completion of the planning process. From February 1998 through June of 1999, the Steering Committee met regularly with Morgenstern, and after one year of her professional moderation and their diligent work they proposed the creation of the Jewish Community Board of Akron (JCBA) to be the new single entity, which reflected the

CFJL that Wise had presented in his white paper. In June of 1999, the Boards of each agency (JCC, JFS, Lippman Day School and Federation) approved the JCBA proposed model and signed a legal affiliated association. The Steering Committee continued to meet for one more year to insure a successful transition, and today that same JCBA exists and is thriving.

#### KEY FACTORS LEADING TO THE SUCCESSFUL CREATION OF AND TRANSITION TO JCBA

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1. Recognition that the existing model was not meeting the changing needs of the community
2. Recognition that the existing financial situation was not sustainable (the Federation and agencies were spending \$2.25/\$3.5 million (64%) of their combined budgets on staff)
3. Recognition that merging existing agencies for purely financial reasons would not address the real issue of serving the Jewish community
4. Understanding that they needed to start from scratch; they were not merging four agencies, they were creating one single new entity that could not be viewed as a Federation top-heavy organization; Federation had to give up its name
5. All Jewish institutions were involved as equal partners and all came to the table wearing their community hats
6. Consultant focused her facilitation on helping the leaders learn how to make decisions and operate as one community. They were not making decisions by consensus, rather they were learning to live with the mantra of, “if you can live with this decision, we will move onto the next”, which worked incredibly well.
7. Realizing “the more power you give up the more you gain.”

#### CURRENT MODEL OVERVIEW

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The Jewish Community Board of Akron (JCBA) is a 501(c)3 volunteer association with a mission to preserve, enhance and perpetuate Jewish life in Akron. The JCBA has one ED/CEO, David Koch, one database, and one back-office support staff including accounting, marketing/communication, and HR. The JCBA is the umbrella organization for three agencies, the Shaw Jewish Community Center of Akron, the Lippman School (K-8 Jewish community Day School, and the Jewish Family Service, and oversees the Endowment Fund, *The Akron Jewish News*, the Community Relations Committee and Women’s Committee. The four local synagogues have a collaborative relationship and a business arrangement to outsource their accounting to the JCBA. The JCBA sits on one campus with all three agencies as well as Beth El Congregation (Conservative synagogue which sold its old plant and just built a new building on Campus in 2013), and a Section 8 senior high rise that uses a separate management agency.

#### LEADERSHIP AND GOVERNANCE

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The JCBA has one governing board, whose executive committee is comprised of the presidents of each operating entity and the chairman of the annual campaign. Each agency, JCC, JFS, and Lippman Day School has its own operating Board. They manage the day-to-day operations of

their agencies, while the governing Board manages the big picture. The four Boards have tremendous, positive interaction and rarely conflict. The first Board of the JCBA in 1999 had members selected by each Jewish agency, and after that the heads of each agency appointed a nominating committee to identify and recruit JCBA Board members. The detailed attention to this transition created a culture in which volunteer engagement is valued at every level and has in fact steadily increased since the creation of the JCBA.

## BUDGET AND FUNDRAISING

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The professional staff, along with the operating Boards of each agency, JCC, JFS and Lippman Day School, create their own operating budgets that are subject to approval of the JCBA budget committee, comprised of the treasurers of each agency. In addition to this internal budgeting system, there is an external allocation system to allocate overseas and national dollars.

The JCBA and their agencies participate in the community fundraising efforts. The JCBA focuses on the annual campaign from which each agency benefits, while the agencies focus on their unique fundraising. The theory is that donors are loyal to the traditional brands of JCC, JFS and Lippman Day School, so they are more inclined to give directly to those agencies. There is one single community endowment fund for all agencies, synagogues and some individuals/families, and all agencies share one software with donor information. In 2002, two years after the creation of the JCBA, a capital campaign was launched with the purpose to raise money to improve the Campus. The goal was \$2 million, and in a show of support and strength of the new community consolidation, the campaign raised \$10 million. One donor alone gave \$3 million – an unprecedented gift. In 2010 the JCBA conducted a visioning process, *Imagine Jewish Akron* to continue the monumental work of building their community for the future. Since that, one unnamed donor named an endowment of \$10 million (restricted) to provide the Campus with even greater future stability and flexibility. In 2014, they published the results of their new strategic plan, “Let the Future Begin Now! Pathways to a Thriving Jewish Akron”.

### KEY FINDINGS

- The use of an outside facilitator is essential to keep the process moving forward.
- A successful process can take between six and eighteen months with an additional period of many months to complete the integration.
- Redundancies can be eliminated but cost savings will not be significant particularly if funds are reallocated.
- Volunteer engagement can be increased even with structures that decrease the overall number of boards.
- Synagogues can participate actively in many of these systems.

## SECTION 4: ASSESSMENT SUMMARY

The purpose of this analysis was to assess the fiscal viability of the Jewish Portland Tomorrow framework, and to determine whether a vision of a specific consolidated service model could be realized.

Our work determined a number of key findings that can guide future directions.

1. The “Jewish Newco” framework as a model to be implemented has too many obstacles in front of it to be actualized. There is not enough communal support **today** to realize the full JPT framework. Rather, it should be recognized as an invaluable conversation starter, and communal gift, that can serve as a catalyst for profound changes to how the community’s organizations conduct their business and are structured and staffed.
2. The agencies do not recognize the impact on their particular organizations of the communal issues that drove the Jewish Portland Tomorrow Committee. We never recognized from them or their communal supporters the necessary urgency required for such systemic change. The rationale for agency complacency, in the face of the committee’s articulation of the global concerns, is firmly based in the organizations’ perception of the financial and organization realities in which they function. Large scale changes will only take place if the agencies overcome their complacency and recognize the urgency of the issues confronting the community and themselves.
3. Portland’s Jewish community, while growing in numbers, is experiencing a trajectory of decline that will continue until and unless the community can overcome its complacency and collectively create a vision and system that delivers excellent services and programs that truly enhance Jewish lives.
4. Portland’s organizational community has limited current collaboration, hostility between organizations, significant turf issues, and an overwhelming lack of mutual trust.
5. There is dissatisfaction in the community about the lack of program and service quality and the economic dependency on serving non-Jews.
6. Opportunities for reassigning current expenses or cost reductions exist primarily in staffing and operational areas.

7. There is a sincere willingness and openness in parts of the volunteer community, who initially opposed the JPT framework, to discuss new ways to do business in the community including shared services and functional consolidation.
8. The effort **MUST** be led and driven by Portland's volunteer leadership, and in particular by the Federation's Board of Directors and members of the Jewish Portland Tomorrow Committee until such time that a strong coalition of the willing drives the change.
9. To achieve the collective buy-in required for the kinds of changes required to truly enhance Jewish life in Portland, a vastly different message must be created – a message of urgency and a vision of vibrancy.

We believe that the resistance and confusion that exists in the community can be overcome so that changes can take place (including major institutional system changes). For Portland's Jewish community to address its very real and system-wide problems, a structured, deliberate and broad-based process that utilizes outside facilitation to keep the momentum moving forward is needed. The three most important elements in building this momentum and establishing traction are:

- Establish within the broader community a sense of urgency that if the community and its institutions do not recognize and accept Portland's very real problems, decline and disengagement are inevitable.
- Create a clear and detailed vision of what enhanced Jewish Life in Portland looks like.
- Recognize, in spite of Portland's natural inclination towards egalitarianism, that initially the only way to successfully proceed is by creating a guiding coalition of the willing that is composed of those with communal and political gravitas and organizational girth to create impactful change.

The Jewish Portland Tomorrow committee provided the community (and in particular the agencies) with the gift to see themselves through a different perspective if they are willing to overcome their complacency (some might say denial). Portland has always been a community of builders. From the first Jews who settled in Portland such as Herman Ehrenberg (1844), Jacob Goldsmith and Lewis May (1849), the Jewish community has continued to grow, evolve, and yes, dramatically change. Portland is now once again at one of these historic junctions. Our analysis is clear in its conclusion. The manner in which the community is structured, goes about its business, and is funded is unsustainable. It cannot continue as it is currently structured for the long-term. Once again, change is needed in Portland, and change is truly possible.

## SECTION 5: NEXT STEPS

### IMMEDIATE NEXT STEPS

To achieve success Portland's Jewish community needs to create a deliberate process, involving external expertise (outside consulting facilitation) and an ever expanding broad-based effort.

The process to achieve ultimate success will take six to eighteen months, if not longer. This period of time should not be construed as dragging things out and doing process for the sake of process. To create a future that propels Portland above where it is today, will take a strategic and well planned approach. This approach requires not only financial support, but also more importantly ever increasing numbers of communal supporters.

Key to this support are the next sixty days. During this period the leadership of the Federation and the Portland Jewish Community will have the opportunity to engage in dialogue with the agencies and larger community in order gauge interest, identify opportunities and broaden the coalition of those who support building a stronger and more robust Portland tomorrow.

Over the next sixty days the following actions (with their concurrent goals) will take place:

1. The agencies will each receive copies of the draft plan.
  - a. Increased number of agency representatives will review the report and potentially recognize the global issues and their impact on their agency.
  - b. Creates transparency and openness which are critical to creating communal buy-in and support.
  
2. Structured interview meetings with the agencies.
  - a. Establish the commitment by the JFGP Board and Jewish Portland tomorrow committee to actively engage in bringing this work to fruition.
  - b. Provides an intimate opportunity for the JFGP and JPT Committee to hear directly from the agencies what they thought about the findings, and more importantly what they accept or reject (thus gauge whether they have overcome their complacency).
  - c. Reinforces that this is now a collaborative process moving forward. It is agency leadership talking to Federation leadership.
  - d. Identify additional buy-in and support for certain ideas, as well as issues or gaps that the agencies may have had with the report (which could potentially then be revised).
  - e. Identify additional potential shared services and/or collaborative ideas.

3. Final revisions to report (corrections and clarifications) and Implementation Plan
  - a. Creates a final implementation plan that has broader support.
  - b. Reinforces collaborative dynamic moving forward.
  - c. Builds broader guiding coalition.
4. Urgency campaign team starts working.
  - a. Assist in overcoming complacency.
  - b. Create large scale and broad based support.
5. Final Report released (online and via forums/Town Hall meetings)
  - a. Provides opportunity for wider community to read and react to, thus broadening coalition of supports
  - b. Creates opportunities for more potential partners (synagogues) to become part of a coalition of the willing.
6. Launch Urgency campaign
  - a. See #4 above.
7. Coinciding with the launch of the urgency campaign to overcome complacency, the leadership from the MJCC, JFGP, JFCS, OJCF, JPT Committee and perhaps BB Camp should begin regularly meeting under the guidance of an external facilitator.<sup>43</sup>
  - a. Create initial guiding coalition.
  - b. Begin shaping future plans.

## NEXT STEPS PLAN

Detailed next steps stages can be found on the following pages.

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<sup>43</sup> By starting with a small group (and not modeling this on consensus or egalitarian principles of everyone having a seat at the table), the initial work of creating a sense of urgency and a structure to create a vision can be established. While this may appear to run counter to the egalitarian nature of Portland, as well as not be part of the normative community polity of consensus based decision making, as long as this group operates in an open and transparent manner they can make decisions and offer suggestions that others can support.

ACTIVITIES	ACTIONS	RESPONSIBILITY	TIMELINE
<b>1. Establishing a Sense of Urgency</b> <ul style="list-style-type: none"> <li>• Examining the market and competitive realities</li> <li>• Identifying and discussing crises, potential crises or major opportunities</li> </ul>			
<p>A. Present initial findings</p> <p>B. Contact each Agency President to check in after finding's meetings.</p> <p>C. JPT Committee and JFGP Board review final draft report and communicate comments.</p> <p>D. Review full (draft) report at agency specific meetings with Presidents , Incoming Presidents and Executive Directors.</p> <p>E. Marketing team appointed to begin crafting urgency message and marketing strategy.</p>	<p>A. Findings presented to JPT Committee, Agency Presidents, Agency Executive Directors and JFGP Board.</p> <p>B.</p> <ol style="list-style-type: none"> <li>1. Contact Agency Presidents.</li> <li>2. Report findings via email report to JFGP Board and JPTC.</li> </ol> <p>C.</p> <ol style="list-style-type: none"> <li>1. Report verbally delivered.</li> <li>2. Review and comment.</li> </ol> <p>D.</p> <ol style="list-style-type: none"> <li>1. Send draft report to Presidents, Incoming Presidents and Executive Directors.</li> <li>2. Schedule meetings with agencies.</li> <li>3. Meet with agency leadership to review report, assess buy-in, and identify whether there is an acceptance of urgency.</li> <li>4. Report back findings to consultant who will revise final report.</li> </ol> <p>E.</p> <ol style="list-style-type: none"> <li>1. Appoint marketing professional to chair JPT communication task-force.</li> <li>2. Establish JPT Communications Task Force objectives, benchmarks and timeline.</li> <li>3. Select 2-3 additional marketing experts to serve on committee.</li> </ol>	<p>A. DCS Consultant</p> <p>B. JFGP Chair</p> <p>C.</p> <ol style="list-style-type: none"> <li>1. DCS Consultant</li> <li>2. Committee and Board</li> </ol> <p>D.</p> <ol style="list-style-type: none"> <li>1. Bob Horenstein</li> <li>2. Assigned joint JPT/JFGP Board teams</li> <li>3. Assigned joint teams</li> </ol> <p>4.Assigned joint teams</p> <p>E.</p> <ol style="list-style-type: none"> <li>1. JFGP Chair</li> <li>2. Task Force Chair</li> <li>3.TF Chair and CEO</li> </ol>	<p>A. March 18</p> <p>B.</p> <ol style="list-style-type: none"> <li>1. Prior to plan sent.</li> <li>2. April 3- 11</li> </ol> <p>C.</p> <ol style="list-style-type: none"> <li>1. April 3</li> <li>2. Due 4/8</li> </ol> <p>D.</p> <ol style="list-style-type: none"> <li>1. April 14</li> <li>2. Review 4/23 – 5/6</li> <li>3. 4/23</li> <li>4. May 7- 14</li> </ol> <p>4. 5/16-17</p> <p>E.</p> <ol style="list-style-type: none"> <li>1. After April 3</li> <li>2. Start April 4</li> <li>3. Start April 4</li> </ol>

<p>F. Publish online full report, Executive Summary and Highlights document (and send final report to agencies)</p> <p>G. Present report to agency boards, open community forums, rabbis and synagogue presidents, etc. (<i>Message is about urgency and need for the community to come together to create a new vision - which will happen, as a community process in very near future</i>).</p>	<p>4. Develop and conduct soft launch of urgency messaging campaign.</p> <p>F.</p> <ol style="list-style-type: none"> <li>1. Create Highlights documents.</li> <li>2. Publish online full final report and additional materials (remove draft report).</li> <li>3. Announce in Marc’s Remarks PDX that final report is online. Focus on Urgency message.</li> </ol> <p>G.</p> <ol style="list-style-type: none"> <li>1. Prepare community report presentation.</li> <li>2. Train JFGP board members to present findings.</li> <li>3. Presentation with Synagogue Presidents, Incoming Presidents and Rabbis.</li> <li>4. Presentation with non-affiliated organizations.</li> <li>5. Presentation at Moishe House.</li> <li>6. Town Hall Community Forums.</li> </ol>	<p>4. Task Force</p> <p>F..</p> <ol style="list-style-type: none"> <li>1. Task Force</li> <li>2. JFGP Marketing</li> <li>3. JFGP CEO</li> </ol> <p>G.</p> <ol style="list-style-type: none"> <li>1. Marketing team</li> <li>2. Marketing team</li> <li>3. JFGP Board teams make presentations</li> <li>4. JFGP Board teams</li> <li>5. JFGP CEO and Chair</li> <li>6. Select Board members</li> </ol>	<p>4. Initiated after feedback sessions with agencies.</p> <p>F.</p> <ol style="list-style-type: none"> <li>1. Start April 14</li> <li>2. May 29</li> <li>3. May 30</li> </ol> <p>G.</p> <ol style="list-style-type: none"> <li>1. June 2 – 6</li> <li>2. June 9-13</li> <li>3. June 16-27</li> <li>4. June 16-27</li> <li>5. June 16-27</li> <li>6. June 16-27</li> </ol>
<p><b>2. Developing the Guiding Coalition (GC)</b></p> <ul style="list-style-type: none"> <li>• Putting together a group with enough power to lead the change</li> <li>• Getting the group to work as a team</li> </ul>			
<p>A. Engage a facilitator to assist GC Team in working together, moving agenda forward and discussing strategies.</p> <p>B. Convene meetings with current and incoming presidents (MJCC, JFGP, OJCF, JFCS, BBC)</p>	<p>A.</p> <ol style="list-style-type: none"> <li>1. Select Portland based facilitator.</li> </ol> <p>B.</p> <ol style="list-style-type: none"> <li>1. Develop multi-session (4-6 monthly or bi-monthly meetings) agenda in consultation with GC Team.</li> <li>2. Jointly identify opportunities for potential further collaboration.</li> <li>3. Convene Presidents Council 2X, report what is taking place.</li> </ol>	<p>A.</p> <ol style="list-style-type: none"> <li>1. Joint decision of JFGP, MJCC and JFCS chairs.</li> </ol> <p>1. Facilitator</p> <p>2. GC Team w/facilitator</p> <p>3. Project Manager , facilitator, and GC reps.</p>	<p>A.</p> <ol style="list-style-type: none"> <li>1. May 30 – June 20</li> </ol> <p>B.</p> <ol style="list-style-type: none"> <li>1. June 20 – Nov. 21</li> <li>2. June 20-Nov. 21</li> <li>3. Aug. &amp; Nov.</li> </ol>

<p>C. Conduct two- hour change workshop for guiding coalition and professionals (<i>understand the necessary next steps, can work effectively together on change, and most importantly, begin speaking the same common language</i>).</p>	<p>4. Communicate to synagogues and other organizations what is taking place (writing and meeting).</p> <p>5. Invite presidents with ED’s and rabbis of all organizations for briefing.</p> <p>6. Hire Project Manager</p> <p>7. Create GC team Task Force (plus select others to design framework to create the community vision</p> <p>C. 1.GC team and peer EDs</p>	<p>4. Project Manager and GC reps.</p> <p>5. Project Manager, GC reps</p> <p>6. Joint decision of JFGP, MJCC and JFCS chairs.</p> <p>7. Facilitator and GC Team</p> <p>C. 1. Facilitator or outside consultant</p>	<p>4. June, Aug and Nov.</p> <p>5. Aug. and Dec.</p> <p>6. Mid-July</p> <p>7. Late July</p> <p>C. 1. July/August</p>
<p><b>3. Developing a Vision and Strategy</b></p> <ul style="list-style-type: none"> <li>• <i>Creating a vision to help direct the change effort</i></li> <li>• <i>Developing strategies for achieving that vision</i></li> </ul>			
<p>A. Initiate multi- session community-wide inclusive visioning process (that also identifies strategies)</p> <p>B. Conduct half day agency board forum for community boards (including synagogues, and other organizations) on vision, models and change.</p>	<p>A.</p> <p>1. Create 2-person volunteer team to chair vision forums.</p> <p>2. Conduct three 1/3-day vision forums.</p> <p>3. Marketing team craft vision statement and create vision campaign strategy.</p> <p>B.</p> <p>1. Design Board Forum</p> <p>2. Invite boards (plus other logistics)</p> <p>3. Identify structural models for exploration that align with vision.</p>	<p>A.</p> <p>1. Select individuals with agency credibility to chair</p> <p>2. Chairs and facilitator design/facilitate</p> <p>3. Urgency Task Force</p> <p>B.</p> <p>1. PM and GC Team</p> <p>2. Project manager</p> <p>3. PM presents to GC</p>	<p>A.</p> <p>1. July</p> <p>2. Sept. 2- Oct. 25</p> <p>3. July/August structure campaign Oct. 25 main launch</p> <p>B.</p> <p>1. Nov.</p> <p>2. Nov.</p> <p>3. Nov – Dec.</p>

<p>C. Establish cross representational community teams to create implementation strategies around vision strategies</p>	<p>4. Conduct forum</p> <p>C.</p> <ol style="list-style-type: none"> <li>1. Expand GC influence by creating larger group which includes GC team, plus key congregational leadership to prioritize vision plan.</li> <li>2. Cross organizational teams establish framework to determine best in class programming (what does the assessment look like, how assess, how reward)</li> <li>3. Vet models with boards and volunteers</li> </ol>	<p>4. PM, facilitator, and GC team (plus additional)</p> <p>C.</p> <ol style="list-style-type: none"> <li>1. GC Team</li> <li>2. Under auspices of expanded GC Team</li> <li>3. Expanded GC Team</li> </ol>	<p>4. January, 2015</p> <p>C.</p> <ol style="list-style-type: none"> <li>1. Feb. 2015</li> <li>2. Feb-April</li> <li>3. April-May</li> </ol>
<p><b>4. Communicating the Change Vision</b></p> <ul style="list-style-type: none"> <li>• <i>Using every vehicle possible to constantly communicate the new vision and strategies</i></li> <li>• <i>Having the guiding coalition role model the behavior expected of employees</i></li> </ul>			
<p>A. New JPT vision statement campaign launched and expanded</p> <p>B. Guiding Coalition communicates its work and actions it is implementing.</p>	<p>A.</p> <ol style="list-style-type: none"> <li>1. Communicate progress at agency board meetings.</li> <li>2. Expand communication to general public- Marc's PDX, Oregon Jewish Life, Oregonian, etc.</li> </ol> <p>B.</p> <ol style="list-style-type: none"> <li>1. Present at Agency Presidents and Agency Executive Directors meetings.</li> <li>2. Meet with agency professional staffs to update.</li> <li>3. Meet with Board of Rabbis.</li> <li>4. Convene special meeting of representatives from free standing organizations.</li> </ol>	<p>A.</p> <ol style="list-style-type: none"> <li>1. GC agency presidents and expanded GC team members.</li> <li>2. Marketing team</li> </ol> <p>B.</p> <ol style="list-style-type: none"> <li>1. GC Team members</li> <li>2. GC Team members</li> <li>3. GC Team members</li> <li>4. GC Team members</li> </ol>	<p>A.</p> <ol style="list-style-type: none"> <li>1. May and June</li> <li>2. May</li> </ol> <p>B.</p> <ol style="list-style-type: none"> <li>1. May</li> <li>2. May</li> <li>3. May – June</li> <li>4. May-June</li> </ol>
<p><b>5. Empowering Broad-based Action</b></p> <ul style="list-style-type: none"> <li>• <i>Getting rid of obstacles</i></li> <li>• <i>Changing systems or structures that undermine the change vision</i></li> <li>• <i>Encouraging risk-taking and nontraditional ideas, activities, and actions</i></li> </ul>			
<p>A. Initiate preliminary shared services or initial functional consolidated models.</p>	<p>TBD</p>	<p>TBD</p>	<p>TBD</p>

<p>B. Launch funding of new vision based initiatives</p> <p>C. Fund new vision based initiatives.</p> <p>D. Communicate where funding for new models is coming from</p>			
<p><b>6. Generating Short-term Wins</b></p> <ul style="list-style-type: none"> <li>• <i>Planning for visible improvements in performance, or “wins”</i></li> <li>• <i>Creating those wins</i></li> <li>• <i>Visibly recognizing and rewarding people who made the “wins” possible</i></li> </ul>			
<p>A. Publically launch new models.</p> <p>B. Program Excellence standards effort launched.</p> <p>C. Collaborative efforts communicated.</p>	<p>A.</p> <p>1. Community-wide, cross organizational high level leadership training program initiated.</p> <p>B.</p> <p>1. Performance metrics developed around organizational collaboration measures.</p> <p>2. Customer service training and best in class program evaluation training.</p>	<p>A.</p> <p>1. TBD</p> <p>B.</p> <p>1. Joint professional team.</p> <p>2. Agency Staff</p>	<p>TBD</p>
<p><b>C. Consolidating Gains and producing More Change</b></p> <ul style="list-style-type: none"> <li>• <i>Using increased credibility to change all systems, structures and policies that don't fit together and don't fit the transformation vision</i></li> <li>• <i>Hiring, promoting, and developing people who can implement the change vision</i></li> <li>• <i>Reinvigorating the process with new projects, themes, and change agents</i></li> </ul>			
<p><b>D. Anchoring New Approaches in the Culture</b></p> <ul style="list-style-type: none"> <li>• <i>Creating better performance through customer-and productivity-oriented behavior, more and better leadership, and more effective management</i></li> <li>• <i>Articulating the connections between new behaviors and organizational success</i></li> <li>• <i>Developing the means to ensure leadership development and succession</i></li> </ul>			

## SECTION 6: ADDENDA

### ADDENDUM A: JEWISH PORTLAND TOMORROW - MARC'S REMARKS, JANUARY 4, 2014

*I am delighted to report that our campaign is off to its fastest start in Federation history. As of today we have raised in excess of **\$2.8 million** – that means in three short months we have closed 85% of our campaign. Thank you to those who have already made their commitment. We hope that **everyone** in our Jewish community will join us in strengthening Jewish Portland and the Jewish people.*

*For the last 3+ years I have written my weekly remarks and shared many thoughts about Jewish life and other subjects. As I promised two weeks ago, I will share thoughts on Jewish Portland Tomorrow – a potential future vision for meeting the interests and needs of Jewish life in Portland.*

*This Marc's Remarks may have been the most challenging to write. I am sure it will generate plenty of conversation – both positive and negative. There will be lots of questions and concerns. People may agree or disagree. However, in order to strengthen Jewish Portland, it is necessary to have these difficult conversations.*

Today, according to most studies of Jewish communal life, we are losing “market share.” Fewer and fewer Jews are engaging in Jewish life, at least the way we currently define it. We have moved, not surprisingly so, away from a “sheltered” Jewish community where Jewish organizations were started predominantly because “Jews took care of Jews” or we were not allowed to participate in general communal organizations. We created an incredible “cradle to grave” system that met the needs of the Jewish community *of that time period* – but does it truly meet the needs for today and tomorrow?

Our community alone has 40+ Jewish organizations. Each is striving to meet the needs of its (growing/shrinking) membership or to provide programs and services to the community. In too many ways, each organization is focused on their own needs (including funding), and dare I say, survival. This minimizes our community's capacity to create an **overarching strategy for how to respond to the Jewish community of tomorrow**. As one person said to me recently, “*If we landed in Portland and there was no Jewish communal infrastructure, would we create what we have today?*”

My initial two years were focused on learning more about Jewish Portland. I then approached Jay Zidell, one of our community's most generous philanthropists, about leading an effort to create a future vision for Jewish Portland. In January 2013 a committee of ten dedicated community leaders began to examine Jewish Portland today and to help create a vision for its future. Over a five-month period, the group met every other week to discuss trends and ideas that ultimately led to the development of several key recommendations that appear later in this post. Underlying the development of these recommendations are daunting trends in our community (and in many Jewish communities around the country):

- We have an aging major donor base. Over the past seven years our total Jewish community has seen a reduction in overall philanthropic giving (excluding capital campaigns). Although our community is growing in population, many of our community's elders have passed away and their generous contributions are no longer (an important case for legacy/endowment giving). Their children and grandchildren may not have the same interest, resources, nor connection to carry on their parents' philanthropy.

- If we look across our Jewish community, the majority of support for our Jewish communal system is coming from a small number of families. In some cases, 50%+ of what an organization may raise in a year could come from five or less families.
- The cost of our Jewish communal infrastructure (buildings, staffing, program expenses) continues to escalate while dollars (philanthropic, membership fees and program revenue) remain relatively constant or may be diminishing.
- There is a running theme of “what is mine is mine” – including programming, space and donors. Many organizations want to “run their own \_\_\_\_\_” (you fill in the blank) instead of finding ways to partner with others to share costs or to encourage greater participation. And the “overhead costs” for communal buildings is a major challenge.
- We question whether we are seeing large numbers of new people participating in Jewish life – we seem to see many of the same people involved in multiple organizations and activities.
- It is no longer about the “name on the marquis.” We cannot rest on the historic success of organizations and their Jewish name brand. People today are looking for the highest quality, most affordable, and convenient services to meet their needs – whether in the Jewish community or not.

***It is time to reimagine Jewish Portland...  
and to create a communal system unlike any other.***

What does this mean? **Jewish NewCo** (*a name for discussion purposes only*) – **The creation of a new consolidated organization (Jewish Federation, its partner agencies and others) that focuses on Jewish social services, Jewish life and learning, Jewish philanthropy, and manages the back office expenses for our community.** As part of this plan, the Jewish Federation will be morphed into Jewish NewCo. This new organization will serve as the hub for lifelong access to innovative and exceptional Jewish experiences. Think of it as Amazon.com or what a university may offer – a one-stop place for all things Jewish.

*(Note – the committee did not feel comfortable examining the synagogue community, yet it does believe that there are ways synagogues can benefit in this enterprise.)*

This single overarching Jewish organization provides an *integrated and efficient* approach to Jewish culture, learning, social services, philanthropy, and connections to Israel. We can operate more efficiently by reducing duplication of services and back-office expenses. We can raise additional money with a more sophisticated approach to financial resource development. And any cost savings or new dollars will be invested right back into the community for more Jewish experiences and programs.

Our goal is to make our Jewish community more:

- **Accessible** (lower costs, “programming without walls”)
- **Inclusive** (interfaith families, LGBTQ community, people with disabilities)
- **Meaningful and Inspiring**
- **Fun** (a running theme throughout the meetings).

**It is time for a communal reboot.** *We must recognize that the sum is greater than the parts!* But right now, “turf” and history are in the way.

In recent weeks, meetings took place with leadership from several of the Federation partner agencies to share these ideas and gather preliminary opinions. Not surprisingly, the reactions included legitimate questions. It was suggested that the Jewish Federation hire a consultant to gather more feedback and to add “more meat on the bone.” Immediately, the Jewish Federation Governing Board did just that – not only formally endorsing the concept but also allocating funds to hire an outside consultant. The consultant (someone who understands the Federation system and has also been an Executive Director of a Federation partner agency in another community) will begin his work in mid-January and deliver a full report by the end of March 2014.

We are confident in this process and have taken all steps to ensure its effectiveness in a timely manner. It is our intention that the community will have the opportunity to provide its input.

After we receive the consultant’s report, we can then share more specific details. Maybe Jewish NewCo is a good idea or maybe it is not? Maybe there will be tweaks? But what the community must recognize is that **the status quo will not lead to a sustainable future.**

When we presented this concept to community organizations we shared a photo of a crying baby. The message – *the only people who like change are babies with a wet diaper. Change is difficult.* What must guide us, however, is not history, “turf,” or a personal passion for a single organization –**but detailed studies (i.e. Pew Study) that clearly articulate the changing nature of Jewish life.** Data matters! We must challenge ourselves to respond accordingly or we will be sitting in denial or suspended animation.

Rabbi Aaron Bisno, a leading rabbi in Pittsburgh, wrote on May 8, 2011 an article titled, “It’s Time for a Courageous Conversation.”

*The challenge before us is clear. The more successful an organization becomes, the more difficult it is for its leaders to recognize when things must change. By every measure, the American Jewish community hit the leather off the ball in the 20th century, and now, let’s admit it, we’re simply ‘so 20th century’. Therefore, change we must.*

*We are not able to support all of our congregations and communal organizations as presently configured; and we cannot continue to rely upon business models that no longer abide. Indeed, believing otherwise has become no small part of our problem.*

*The rub is that as recently as a single generation ago, it was appropriate, and even useful, for the Jewish community to have as many organizations, buildings and staff as we have today. But now into a second decade of a new century, with what every assumption and belief upon which our community was founded now challenged, it is simply no longer useful for us to think in terms of “my organization versus yours.”*

*At a moment of seismic communal challenge such as we are presently experiencing, we can ill afford to be more concerned respectively with what any one entity among us will lose than **we are focused collectively on what is required of all of us to ensure the ongoing health, vitality, and future of the Jewish community as a whole.***

I applaud the efforts of this leadership committee. They understood Rabbi Bisno’s call to action and see the true challenges facing our Jewish community. **They have taken the lead – created a bold idea for**

**our future – and now it is time for Portland’s courageous conversation to proceed to the next level.** We must acknowledge our incredible past as well as the enormous challenges before us. We cannot stop here, as every segment of our community – *individual and institutional* – must join in being part of the new solution that our community needs now.

I will have more to share in upcoming weeks. And, as always, I encourage your thoughts and feedback.

Best wishes to you and your family for a healthy, happy and successful new year. May this be a year of bold steps that lead to an even stronger Jewish community going forward.

Shabbat shalom.

Marc

## ADDENDUM B: INTERVIEWEES

Ray Abramowitz	Debbie Frank	R. Michael Kaplan	David Newman+	Jack Schwartz
Bonnie Barg	Josh Frankel+	Alex Kelber	Miles Newmark+	Rochelle Schwartz
Barry Benson+	Paul Frisch+	Shelly Klapper	Paul Norr	Yossi Shallman
Michal Berdichevsky	David Fuks*	R. Debra Kolody	Jeff Nudelman	Eddy Shuldman
Jake Birnbach	Ali Garfinkle	Michelle Koplan*	Brad Pearlman+	Sasha Sicular
Josh Blank	Linda Georges	Priscilla Kostiner	Bob Philip+	Shayna Sigman
Marc Blattner *	Beth Germain*	Stephen Kotkins	Rita Philip	Aaron Simon
Elise Brickner-Schulz	Andy Gitelson*	Stuart Kronick	Jordan Plawner	Les Soltesz+
R. Ken Brodtkin	Lauren Goldstein	Lee Lazarus	Rachel Pollack*	Rebecca Spain
Alan Cabelly+	Mark Goldstein	Megan Leftwich	Irv Potter+	Chanon Spivak
R. Michael Cahana	Mark Goodman	Irving Levin	Emily Quinn	Tom Stern
Kathy Chusid	Kenneth Gordon	Gayle Marger	Jeff Robinson	Ed Tonkin
Kathy Davis-Weiner	Simon Gottheiner	Judy Margles*	Gayle Romain	Julia Waldinger
Micael Delrahim	Steve Gradow	Michael Menashe	Steve "Rosy" Rosenberg	Sharon Weil
Ariel DeWeese	Eli Gregory	Shawn Menashe	Alan Rosenfeld	Michael Weiner+
Julie Diamond*	Rachel Hall*	Toinette Menashe	Eve Rosenfeld	Devora Wilhelm*
Fred Dolgin	Miriam Hecht	Joyce Mendelsohn	Eric Rosenfeld	R. Motti Wilhelm
R. Elizabeth Dunsker	Merrill Hendin*	Jim Meyer	Warren Rosenfeld	Jim Winkler
Jill Edelson	Andrea Herzka	Lora Meyer	Ruth Roth	Jeff Wolfstone
Noah Enelow	Bob Horenstein	Michael Millender	Sharon Rudnick+	Mark Zeitzer
Marian Fenimor*	Josh Hornick	Sharon Morrell+	R. Laurie Rutenberg	Mindy Zeitzer
Hannah Ferber	Donna Jackson	Bruce Morris	Jerry Sadis	Charlene Zidell
R. Tzvi Fischer	Gary Kahn	John Moss	Rob Schlacter	Jay Zidell
Michelle Fliman	Judith Kahn	Alex Mozell	Paul Schlesinger	R. "Zucky" Zuckerman
David Forman	Steven Kahn	Mark New	Jordan Schnitzer	

\* Executive Director

+ President

Select JFGP staff participated in a Focus Group, but their names do not appear on the list.



## GENERAL FOCUS GROUP INTERVIEW SCHEDULE

1. Tell me briefly about yourself, and in particular your involvement in Jewish life in Portland.
2. When you think about the Portland Jewish community what kinds of adjectives come to mind? Explain?
3. What are the greatest challenges impacting Portland's Jewish community?
4. What are the greatest opportunities that can positively impact Portland's Jewish community?
5. As you are aware, the Federation has proposed a new model to enhance and strengthen Jewish life in Portland –Jewish NewCo. I have several questions for you.
6. Can you describe Jewish NewCo to me? What is its primary goal?
7. Do you believe Jewish NewCo can enhance and strengthen Jewish life in Portland?
  - a. What are the model's primary strength's?
  - b. What are the model's primary weaknesses?
  - c. What opportunities present themselves if the model is implemented?
  - d. What are the primary threats to the model being implemented, and can these be overcome? How?
8. If you are not in favor of Jewish NewCo or have reservations, what might cause you to reevaluate your position?
9. What are the most important items that need to be done to successfully implement Jewish NewCo?
10. Do you have anything else you would like to add?

## **INTERNAL FOCUS GROUP INTERVIEW SCHEDULE**

1. When you think about the Portland Jewish community what kinds of adjectives come to mind? Explain?
2. What are the greatest challenges impacting Portland’s Jewish community?
3. What are the greatest opportunities that can positively impact Portland’s Jewish community?
4. I want to turn specifically to Jewish NewCo now. I have several questions for you.
  - a. Can you describe Jewish NewCo to me? What is its primary goal?
  - b. What are the model’s primary strength’s
  - c. What are the model’s primary weaknesses?
  - d. What opportunities present themselves to Portland if the model is implemented?
  - e. What are the primary threats to the model being implemented, and can these be overcome? How?
5. What are the key questions around Jewish NewCo that you believe still need to be answered? Do any of you have specific answers to any of these questions?
6. Assuming the model is implemented, how long a period would be reasonable from vote to full implementation?
7. What are the most important items that need to be done to successfully implement Jewish NewCo?
8. Do you have anything else you would like to add?

## **AGENCY INTRODUCTION – KEY QUESTIONS**

1. What is your organization’s mission?
2. How do you fulfill your agency’s mission?
3. Would you consider yourself in growth, sustain or decline mode?
4. What are your organization’s greatest challenges?
5. If you could solve these challenges, how would you do so?
6. What are your organization’s greatest opportunities?
7. How can you make these realities come to fruition?
8. What are your organization’s greatest threats?
9. How would you define your relationship with the Federation? Other agencies?

## **AGENCY PRESIDENT/ED NEWCO INTERVIEW SCHEDULE**

1. When you think about the Portland Jewish community what adjectives come to mind?
2. What are the greatest challenges impacting Portland’s Jewish community?
3. If you could solve these challenges, how would you do so?
4. What are the greatest opportunities that can positively impact Jewish life in Portland?
5. How would you make these opportunities come to fruition?
6. When you first heard about Jewish NewCO, what was your initial reaction?
7. Over time, has your reaction changed?
8. Can you describe Jewish NewCo to me? What is its primary goal?
9. Would you say that today you are more or less inclined to believe the model can achieve what it states? Why?
10. What are the model’s primary weaknesses? Strengths?
11. What will be the impact on Jewish life in PD if implemented? Your agency?
12. What are the primary threats to the model being implemented, and can these be overcome? How?
13. What specific questions would you need answered:
  - a. Before you would support the model?
  - b. To strengthen your support for the model?
14. Assuming the model is implemented, how long a period would be reasonable from vote to full implementation?
15. What are the most important items that need to be done to successfully implement Jewish NewCo?
16. Are there any questions you were expecting/hoping I would ask, but did not?
17. Do you have anything else you would like to add?

## **STAKEHOLDER INTERVIEW SCHEDULE**

1. Tell me about yourself, and in particular your involvement in Jewish life in Portland.
2. When you think about the Portland Jewish community what kinds of adjectives come to mind? Explain?
3. What are the greatest challenges impacting Portland’s Jewish community?
  - a. {If relevant} – Your particular organization?
4. If you could solve these challenges, how would you do so?
5. What are the greatest opportunities that can positively impact Portland’s Jewish community?
6. How would you make these opportunities come to fruition?
7. As you are aware, the Federation has proposed a new model to enhance and strengthen Jewish life in Portland –Jewish NewCo. I have several questions for you about it.
  - a. How familiar are you with it?
  - b. When you first heard about it, what was your initial reaction?
  - c. Over time, has your reaction changed?
  - d. Can you describe Jewish NewCo to me? What is its primary goal?
  - e. Would you say that today you are more or less inclined to believe the model can achieve what it states? Why?
  - f. What are the model’s primary weaknesses? Strengths?
  - g. What can happen to Portland’s Jewish community if the model is implemented?
  - h. What are the primary threats to the model being implemented, and can these be overcome? How?
8. What are the key questions around Jewish NewCo that you believe still need to be answered? Do any of you have specific answers to any of these questions?
9. Assuming the model is implemented, how long a period would be reasonable from vote to full implementation?
10. What are the most important items that need to be done to successfully implement Jewish NewCo?
11. Are there any questions you were expecting/hoping I would ask, but did not?
12. Do you have anything else you would like to add?

## ADDENDUM D: ADDITIONAL RESOURCE MATERIALS

- Bowling Alone: The Collapse and Revival of American Community, Robert Putnam, 2000
- Ethnic Identification Among American Jews: Socialization and Social Structure, Arnold Dashofsky and Harold Shapiro, 1993.
- Giving USA 2013: the Annual Report on Philanthropy in America, Lilly School of Philanthropy, Indiana University,
- The Jews of Oregon 1850-1950, Steven Lowenstein, 1987
- Leading Change, John P. Kotter, 1996
- Leading Change: Why Transformation Efforts Fail, Harvard Business Review, John P. Kotter, 1994
- Managing Transition: Making the Most of Change, William Bridges, 2003
- Mergers, Acquisition, and Consolidation of Jewish Social Service Agencies in the Last Decade, United Jewish Communities, November 2004
- Moving :The Impact of Geographic Mobility on the Jewish Community, Jewish Federation of North America, November 2009
- A Portrait of Jewish Americans, Pew Research, October 1, 2013
- Understanding Collaboration between Federations and Foundations in Communities with Separately Incorporated Foundations, Bussell Philanthropy Associates for United Jewish Communities, September, 2007
- Study of High Net Worth Donors, Lilly School of Philanthropy, Indiana University

## PORTLAND AGENCY INFORMATION FORMS

*Thank you for completing this questionnaire. Your honest and thorough answers are vital for drawing a comprehensive picture of your organization. Please feel free to add additional comments in each section.*

Name of person (and position) completing this form:					
Name of Organization:					
Date of organization's creation:					
<b>Organizational Profile</b>					
<b>Number of clients and/or users:</b>	<b>Current</b>	<b>Three years ago</b>	<b>Five years ago</b>		
Unique (number of individuals, regardless of number of times he/she uses)					
Total users (someone could be counted multiple times)					
% who are Jewish					
% who are not Jewish					
The mission statement was last reviewed when:					

Number of board members:					
Total number of people serving on standing committees:					
How often do Board meetings occur:					
Do past presidents by virtue of being past-presidents serve on the Board (not including immediate past):					
How often does the Executive Committee meet:					
The Executive Committee is composed of what positions:	Please list				
<b>The organization raises what percentage of funds from:</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>		
Membership					
User Fees	%	%	%		
Contributions	%	%	%		
Foundation Grants ( <i>not individuals giving via a foundation</i> )	%	%	%		
Government					
Federation					
Additional Comments:					

Development						
Annual Fundraising						
	<b>Total number of gifts</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>		
	by personal visit					
	by telephone					
	by direct mail					
	Online					
	Other					
	<b>Total amount raised</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>		
	by personal visit	\$	\$	\$		
	by telephone	\$	\$	\$		
	by direct mail	\$	\$	\$		
	Online	\$	\$	\$		
	Other	\$	\$	\$		
What % of your total budget comes from your top five donors (individuals – not Federation or Government)?						
		<b>2011</b>	<b>2012</b>	<b>2013</b>		
		%	%	%		

What % of your fundraising income comes from your top 5 donors (individual people)?						
		2011	2012	2013		
		%	%	%		
	Multi-year commitments					
	Do you have any pledges made for multiple years?					
<b>Board Giving</b>						
	How many of your current Board members give to your organization?					
	What percentage of your total fundraising dollars, come from your Board?				%	
<b>Capital</b>						
			2011	2012	2013	
	Has your organization raised capital funds?					
	Total amount raised		\$	\$	\$	
<b>Grants</b>	<b>Total \$ raised from Grants</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>		
	Foundations	\$	\$	\$		
	Government	\$	\$	\$		

	Individuals via Foundations	\$	\$	\$		
	Other	\$	\$	\$		
<b>Events*</b>		<b>2011</b>	<b>2012</b>	<b>2013</b>		
	Number					
	Total Amount Raised	\$	\$	\$		
*For this purpose, Events are defined by having the primary function to cultivate, solicit or steward constituents or potential constituents.						
	Please list total cost per event					
	2011					
	Event #1	\$	Name, Location			
	Event #2	\$	Name, Location			
	Event #3	\$	Name, Location			
	Event #4	\$	Name, Location			
	Event #5	\$	Name, Location			

	2012					
	Event #1	\$	Name, Location			
	Event #2	\$	Name, Location			
	Event #3	\$	Name, Location			
	Event #4	\$	Name, Location			
	Event #5	\$	Name, Location			
	2013					
	Event #1	\$	Name, Location			
	Event #2	\$	Name, Location			
	Event #3	\$	Name, Location			
	Event #4	\$	Name, Location			
	Event #5	\$	Name, Location			
<b>Additional Comments</b>						



Facilities				
	Write the approximate balance sheet value of your organization's property and equipment.	\$		
	Write the estimated total square footage of the buildings/space you:			
	Own	_____ sq. feet		
	Lease	_____ sq. feet		
	Use free of charge	_____ sq. feet		
	Check in the appropriate column how strongly you agree with the following statements. (Strong disagreement indicates an opportunity for capacity improvement.)			
	Our organization's facilities are in excellent condition.			
	Our organization's facilities are adequate to meet our needs.			
	Our computer systems are adequate to meet our needs.			

	Complete the following chart regarding facilities improvements during the last fiscal year (FY),			
	and improvements planned for the next fiscal year.			
		Cost: FY13	Est'd Cost: FY14 (Current)	
	Facilities Improvements	\$	\$	
	New paint or landscaping	\$	\$	
	Roof, windows or boiler/furnace repair	\$	\$	
	HVAC, plumbing, electrical, or drywall	\$	\$	
	Ordinance/code compliance	\$	\$	
	Licensing/accreditation compliance	\$	\$	
	Major renovation	\$	\$	
	New construction/property	\$	\$	
	Computer systems upgrade	\$	\$	
	Other	\$	\$	
	No facilities improvements	\$	\$	
	Total	\$	\$	
	Indicate what were/will be the source of the funds for the above improvements and in what			
	amounts.			
		Amount: FY13	Est'd Amount:	

			FY14	
	Maintenance/replacement reserve	\$	\$	
	Endowment	\$	\$	
	Program related investments	\$	\$	
	Operating budget	\$	\$	
	Loan/line of credit	\$	\$	
	Special fundraising	\$	\$	
	Other: _____	\$	\$	
	<b>Facility Usage</b>			
	Our facilities are used to its fullest capacity?			
	There is the possibility to better utilize the facilities with little or no additional costs			
	There is the possibility to better utilize the facilities with moderate additional costs			
	There is the possibility to better utilize the facilities only with significant costs			

Staffing									
	Total Number of FTE								
	<i>see note below before filling out this section</i>								
	Number of FTE involved with <b>Program</b>								
	Number of FTE involved with <b>Development</b>								
	Number of FTE involved in <b>Executive Leadership</b>								
	Number of FTE involved in <b>Finance and Administration</b> (billing, accounting, etc.)								
	Number of FTE involved with <b>Marketing</b>								
	Number of FTE involved with <b>Facilities</b>								
	Misc. FTE (Please explain)		Explain:						
	Total	0							
	In your opinion, are you sufficiently staffed to meet goals?								
	If no, how many FTEs do you believe you need?								

<b>Note</b>	<i>It is fully possible to have someone have split responsibilities: As an example: CEO: development .5; program .25; operations .25; Program person: development .33; program .67</i>								
	<b>Position title</b>	<b>% Program</b>	<b>% Development</b>	<b>% Executive Leadership</b>	<b>% Finance and Administration</b>	<b>% Marketing</b>	<b>% Facilities</b>	<b>% Misc.</b>	

## ADDENDUM F: JCC/FEDERATION INTEGRATED AND SELECT COOPERATIVE MODELS

- Savannah GA
- Charleston SC
- Augusta GA
- Phoenix AZ
- Fort Worth TX
- Louisville KY
- Mohawk Valley NY
- Knoxville TN
- Columbia SC
- Durham-Chapel Hill NC
- Akron, OH
- Berkshire County MA
- Portland, ME ( Southern Maine)
- Rhode Island
- Wilkes-Barre PA
- Southern NJ
- Austin TX
- Greenwich CT
- Sarasota FL
- Omaha NE
- Cherry Hill NJ
- Toledo OH
- Dayton OH
- Chattanooga TN
- Greensboro NC
- Cumberland County, NJ
- Collier City FL
- Fort Meyers FL
- Little Rock AR
- Santa Barbara CA
- Fort Wayne IN
- Madison WI
- Tampa FL
- Harrisburg PA
- Western CT
- Youngstown OH
- Tulsa OK
- Pinellas FL
- Lexington KY
- Raleigh-Cary NC
- Lancaster PA
- Virginia Beach VA

### SELECT CONSOLIDATED MODELS

#### Foundations

East Bay, CA  
Detroit, MI  
Houston, TX  
Omaha, NE  
Memphis, TN

#### JFS\*

Orange County, CA  
Akron, OH

\* National association does not track