

**Havurah Shalom  
Hazon Long Range Plan  
August 2014**



# Havurah Hazon -- Long Range Plan 2014 - 2019

## Table of Contents

	<i>page</i>
<b><i>Graphic Summary</i></b>	<b>5</b>
<b><i>Executive Summary</i></b>	<b>6</b>
<b><i>Introduction</i></b>	<b>10</b>
<b><i>History of Long Range Planning at Havurah Shalom</i></b>	<b>10</b>
<b><i>Hazon Methodology</i></b>	<b>10</b>
<b><i>Findings: Kehillah (Community and Culture):</i></b>	
<b><i>Today and Tomorrow</i></b>	<b>12</b>
<b><i>How old are we?</i></b>	<b>12</b>
<b><i>How long have we been members?</i></b>	<b>13</b>
<b><i>How diverse are we?</i></b>	<b>13</b>
<b><i>We are growing</i></b>	<b>14</b>
<b><i>How well are we integrating and connecting members?</i></b>	<b>14</b>
<b><i>What accommodations do we need?</i></b>	<b>15</b>
<b><i>Where do we live?</i></b>	<b>16</b>
<b><i>Where do we come from, Jewishly?</i></b>	<b>16</b>
<b><i>How do we experience Jewishness?</i></b>	<b>18</b>
<b><i>How are we outliers in Jewish congregational trends?</i></b>	<b>20</b>
<b><i>How are we financially?</i></b>	<b>20</b>
<b><i>What do we value?</i></b>	<b>21</b>
<b><i>How are we connecting with the greater Jewish community?</i></b>	<b>21</b>
<b><i>How are we thinking and feeling about Israel?</i></b>	<b>22</b>
<b><i>Implications of Kehillah Findings</i></b>	
<b><i>For the Rabbi</i></b>	<b>24</b>
<b><i>For the Staff</i></b>	<b>24</b>

## Havurah Shalom Hazon: Long Range Plan – 2014 to 2019

<i>For Space</i>	25
<i>For Funding</i>	26
<i>For our Governance Structure</i>	26
<i>For Music</i>	27
<b><i>Kehillah Vision and Strategies</i></b>	<b>27</b>
<b><i>Findings: Avodah (Spiritual Life and Religious Practice)</i></b>	
<b><i>Today</i></b>	<b>27</b>
<i>What feels spiritual?</i>	28
<i>How well do we know Hebrew?</i>	29
<b><i>Tomorrow</i></b>	<b>30</b>
<b><i>Implications of Avodah Findings</i></b>	
<i>For the Rabbi</i>	30
<i>For the Staff</i>	30
<i>For Space</i>	30
<i>For Funding</i>	30
<b><i>Avodah Vision and Strategies</i></b>	<b>31</b>
<b><i>Findings: Limud (Education and Life Long Learning)</i></b>	
<b><i>Today</i></b>	<b>31</b>
<b><i>Tomorrow</i></b>	<b>32</b>
<b><i>Implications of Limud Findings</i></b>	
<i>For the Rabbi</i>	32
<i>For the Staff</i>	32
<i>For Space</i>	32
<i>For Funding</i>	32
<i>For Music</i>	32
<b><i>Limud Vision and Strategies</i></b>	<b>33</b>
<b><i>Findings: Tikkun Olam (Social Justice)</i></b>	

## Havurah Shalom Hazon: Long Range Plan – 2014 to 2019

<b><i>Today</i></b>	<b>33</b>
<b><i>What are we concerned about?</i></b>	<b>34</b>
<b><i>Tomorrow</i></b>	<b>35</b>
<b><i>Implications of Tikkun Olam Findings</i></b>	
<b><i>For the Rabbi</i></b>	<b>36</b>
<b><i>For the Staff</i></b>	<b>36</b>
<b><i>For Space</i></b>	<b>36</b>
<b><i>For Funding</i></b>	<b>36</b>
<b><i>For our Governance Structure</i></b>	<b>36</b>
<b><i>Tikkun Olam Vision and Strategies</i></b>	<b>36</b>
<b><i>Findings: Hadracha (Leadership and Governance)</i></b>	
<b><i>Today</i></b>	<b>37</b>
<b><i>Tomorrow</i></b>	<b>38</b>
<b><i>Implications of Hadracha Findings</i></b>	
<b><i>For the Rabbi</i></b>	<b>38</b>
<b><i>For the Staff</i></b>	<b>38</b>
<b><i>For Funding</i></b>	<b>38</b>
<b><i>For our Governance Structure</i></b>	<b>38</b>
<b><i>Hadracha Vision and Strategies</i></b>	<b>39</b>

# Havurah Shalom Long Range Plan Overview- August 2014

**Mission:** Provide a vibrant, diverse, participatory Jewish community steeped in Jewish values, promoting spirituality, learning and acts of social responsibility.

## Foundations & Vision Strategies Recommended Actions



**Values:** Inclusiveness Participatory Transparency Vibrancy Creativity Solvency

## **EXECUTIVE SUMMARY**

*The purpose of this executive summary is for you to be able to easily see the visions and suggestions that arose from the findings of the Hazon Process, February 2012 – May 2014. The document following this summary includes an introduction, an explanation of our methodology, our findings in each of the foundational areas of our organization, and a restatement of the strategies and recommended actions you see here. We hope that you will dig deeply into the material because it serves as a mirror for the congregation today. Our self-awareness can only increase our communal vibrancy and strength.*

*Each of the following strategies and recommendations for action emerged from the steps we followed to identify who Havurah Shalom is, where we've come from, and how we want to remain ourselves, and remain sustainable, as we move into the future. We offer the executive summary as part of the entire plan, including the attached graphic summary, for the Steering Committee's acceptance.*

*One of the biggest ideas that emerged from our inquiry was a need for more staff, or staff time, to support the participatory culture of Havurah Shalom, at the size we are now, in the times we live now.*

*Participation is a core value of community. We want staff to help organize, guide, engage, and connect members, but not to become the focal point of all programming. Integration of new members is important, as is the need for opportunities to reach beyond the connections we naturally make in the course of our activities. Many of us want to participate in more activities and we don't have the time ourselves to pull committees together, to arrange the logistics of meetings, or to publicize the event. Staff support for these logistical needs would enable members to more fully engage with others in the community, which continues to be a strong desire of Havurahniks.*

*The Steering Committee will have the task of prioritizing the recommendations the Hazon Committee has brought forward. Steering may also determine other actions that are needed to realize this vision. The recommended actions in this plan came directly from the inquiry process. The plan will live and be useful to Havurah only to the extent that Steering gives it life. Steering will make the actual implementation plan, and add actions it determines are appropriate.*

**Havurah Shalom Mission:**

*Provide a vibrant, diverse, participatory Jewish community steeped in Jewish values, promoting spirituality, learning and acts of social responsibility.*

**Hazon Visions and Strategies**

***Kehillah***

*Havurah Shalom members feel connected across generations and different cohorts. Members are committed to participating to ensure that organizational needs are met.*

Strategies:

- Develop and support strategies that gracefully integrate new members
- Create opportunities for cross connection between Shabbat School families and other age groups through spiritual activities and Tikkun Olam
  - Recommended Action: Provide additional staff/staff time to support connections
- Increase music at all events
  - Recommended Action: Provide additional opportunities for informal music participation
  - Recommended Action: Provide additional opportunities for music learning
  - Recommended Action: Provide additional staff/staff time to support music
- Organize smaller Havurot, intergenerational or neighborhood groups for Shabbat and holiday celebrations
  - Recommended Action: Provide additional staff/staff time to support the development of small groups
- Continue to develop programming focused on the empty nester cohort
- Leverage current technological tools to help organize and support volunteers

***Avodah***

*Havurah Shalom members' spiritual lives are suffused with meaningful Jewish rituals and communal practices which they help to shape.*

Strategies:

- Expand the pool of service leaders by providing training and mentoring
  - Recommended Action: Consider having a staff position that is a blend of education in ritual practice and service leadership.
- Strengthen use of music in ritual programming
- Increase the accessibility and comfortable nature of services for new Hebrew learners.
- Maintain regular Shabbat morning service, weekday Minyan and frequent Friday night services
- Support holiday celebrations that engage diverse cohorts
- Connect families in the Shabbat School program to Shabbat services and holiday rituals

## Havurah Shalom Hazon: Long Range Plan – 2014 to 2019

- Recommended Action: Shift a certain number of Shabbat School classes each year to meet at Saturday morning services, to increase attendance at services as well as increase familiarity with the service.
- Maintain strong Tot Shabbat and holiday programming for families with young children
- Engage B'nai Mitzvah families (pre- and post-) in a connection with Shabbat morning services

### **Limud**

*Members of all ages and experience teach and learn together, in education programs which reflect a personal, engaging approach to Jewish life.*

Strategies:

- Maintain a robust adult education program
- Continue to support our cooperative Shabbat School program and Middle School and High School programs
- Promote inclusive programs that accommodate a range of learning styles
- Continue integration of music into Shabbat School curriculum
  - Recommended Action: Provide opportunities to help our children feel comfortable with the music of our liturgy, holidays and culture.
- Provide adequate space to accommodate class sizes
  - Recommended Action: Research options in the area around Havurah for accommodating Shabbat School classes, which is the primary time we have insufficient space in the building.

### **Tikkun Olam**

*Havurah Shalom members are engaged in dynamic social action that allows us to live out our values of Tikkun Olam (repairing the world). Tikkun Olam infuses all that we do.*

Strategies:

- Develop additional direct action programming to address immediate needs of people in the local community
  - Recommended Action: Provide intergenerational interactions through Tikkun Olam activities
  - Consider creating a method to allow congregational input into a Tikkun Olam theme for each year, with awareness of continuity and long term commitments, which will tie into all congregational activities (i.e. Shabbat School, Adult Education, High Holiday themes)
- Commit B'nai Mitzvah kids to service during the year before and after their Bar or Bat Mitzvah
- Continue advocacy work that addresses root causes of social injustice

## **Hadracha**

*Havurah Shalom is a respectful, cooperative partnership between clergy, staff, and members. Members of Havurah Shalom govern the organization through membership on Steering and other committees, and take personal responsibility for offering their time, talent, and resources to contribute to the strength of the whole.*

### Strategies:

- Ensure that there is adequate space and operational capacity to meet current needs and potential growth
- Create a Havurah values-based program for financial giving to lessen dues dependency, to increase Havurah's sustainability, and to implement Long Range Plan strategies
  - Recommended Action: Attend to the community's transition from a non-fundraising culture
- Build an endowment and legacy giving program
- Reinvigorate the participatory roots of Havurah
- Ensure a well-defined committee structure
  - Recommended Action: Clarify and define the boundaries of committee priority setting, decision making and budgetary authority.
  - Recommended Action: Convene governance task force to review the number of people on Steering, the length of time of service, and the distinct responsibilities of Exec and Steering.
- Strengthen leadership development throughout the organization
  - Recommended Action: Convene governance task forces to develop a formalized on-boarding process for new Steering members, and formalized leadership training for identified cohorts, for both the Steering and committee levels.
  - Recommended Action: Actively encourage committee members to become involved in leadership roles on their committees as well as rotation of leadership within committees.
  - Recommended Action: Consider hiring a consultant to advise Steering/Exec on transparency as well as board leadership and development
- Improve communication between committees and the congregation
  - Recommended Action: Committees should use Hakol and the community email to communicate to the congregation about any activities being sponsored or funded with congregation resources.
- Foster fruitful partnerships and connections with other organizations
  - Recommended Action: Conduct a 360 degree evaluation process of Havurah from perspective of the greater Portland Jewish community and other institutions we interact with (such as churches, non-profits, etc.).

## **Introduction**

The plan you have before you is the voice of the Havurah Shalom community. In this document, the Hazon Committee has reflected what we understand ourselves to be, and what we long to become. Over two and a half years, the Hazon Committee has tried to find the questions, and the ways to pose the questions to the largest number of members, that would create collective direction for our future.

### ***History of Long Range Planning at Havurah Shalom***

Thoughtful long range planning takes a long time, and must be regularly renewed. Havurah Shalom has been engaged in formal long range planning for the past 20 years.

The first plan, created by a committee with input from members over a year's time and released in 1994, resulted in the fundraising for and purchase of the Beit Kneset we now call home, and our affiliation with the Reconstructionist movement.

The second plan, released in 2002 after two years of work, focused on the congregation's committee structure as the path to increased participation in the community and set goals for action in each of several areas. The draft was presented in congregation-wide meetings for input and revision.

In 2005 and 2006, a process called Havurah 2020 engaged a planning committee in facilitating two community wide, off site retreats, as well as potluck dinners, to dream up the future Havurah Shalom and plan for action that would bring those dreams into reality. Although no document emerged from the Havurah 2020 process, the mission and underlying values of the organization were affirmed, and participation and engagement were increased.

In 2009, Operation Reconnect was the result of a process that began with a consultation from Rabbi Mordechai Liebling to the Steering Committee. It included one to one interviews with two thirds of the congregation and parlor meetings to confirm the data gathered in those interviews. The focus of Operation Reconnect was member satisfaction, and unmet needs were identified in 5 areas: Spiritual Life, Social Action, Education, Membership and Music. Members were found to desire an increase in transparency in each area. Following Operation Reconnect, changes were made to the Friday night service, a Music Coordinator was hired, a Vice-President of Education position established, and the Tikkun Olam and Membership Committees were reconstituted.

Havurah Hazon, the most recent planning process, was charged by the Steering Committee in late 2011 to address particular areas of concern: the challenge of bringing members into leadership; the impending retirement of Rabbi Joey and the need to inform a new rabbi search process; the increase in membership to over 300 families and the implications for programming, space, staff and funding; and the sustainability of the congregation beyond the life time of the current members. The Steering Committee requested a guidance document that would give leadership a clear focus for decision making in the future.

### ***Hazon Methodology***

Havurah Hazon began meeting monthly in early 2012 to determine the process for creating the guidance document Steering had requested. Eventually the committee met bi-monthly, then weekly, as the amount of work increased over the past 25 months.

Hazon committee members conducted interviews with staff and lay leaders in the spring of 2012 to learn what was going well; what trends they were seeing inside and outside Havurah, now and for the future; and what they

## Havurah Shalom Hazon: Long Range Plan – 2014 to 2019

would need to know now to be able to plan for the future. Committee members also began to read Jewish futurists' writings and surveys, to understand what the Jewish world outside of Havurah was predicting.

The committee used most of our meeting time in 2012 to design the data gathering process which would focus on the past milestones, present conditions, desired future, and the gap between present and future to be filled with action plans. We wanted all Havurah Shalom stakeholders to be able to participate.

We planned a series of community wide gatherings that took place in January, April, June and October 2013 with an offsite retreat in March 2014. The community gatherings had attendance of between 20 and 40 members each, and the offsite retreat was attended by 119 members, including children. We also held three gatherings during Shabbat School so that busy parents of school aged kids would be able to participate in the development of this plan. We worked collaboratively with the History Project and the Fundraising groups.

The committee also determined we needed quantitative data to be able to make the best long range projections. We designed a demographic survey -- the Havurah Census -- taken on-line in the summer and fall of 2013, and a survey, which was done with rapid polling technology in March 2014. The census emerged from the Membership Committee's new member interview form. Input into the development of the census came from committee members, from staff, and from demographic experts within the membership. Three quarters of the membership participated in the census. The survey was conducted with 79 members who came to a retreat in March 2014. The 79 members were reflective of the congregation as a whole in terms of age, gender, diversity and length of membership. They certainly were self-selected, committed members of Havurah, so in this case our sample may be skewed towards more active, engaged congregants. This is most likely the case with the participants and the data we collected at many other large gatherings/congregation meetings and smaller gatherings (Shabbat School parent meetings) over several years. The Hazon committee is comfortable with this, if true.

The draft plan was sent by email to the congregation in May, 2014, and presented to the Steering Committee in June. Feedback was received from Steering, staff, 5 committees, and 8 individuals. As much as possible, feedback from groups was added to the plan verbatim, keeping the integrity of the plan paramount. Individual feedback was added if it echoed other individual input received by Hazon – the committee wanted to be true to the goal of hearing the collective voice.

The committee used a matrix to sort the data we gathered, with five topic areas: Kehillah (community and membership), Avodah (services and spiritual life), Limud (learning, for all ages), Tikkun Olam (social justice and participation in the wider community), and Hadracha (governance and leadership, both professional and lay).

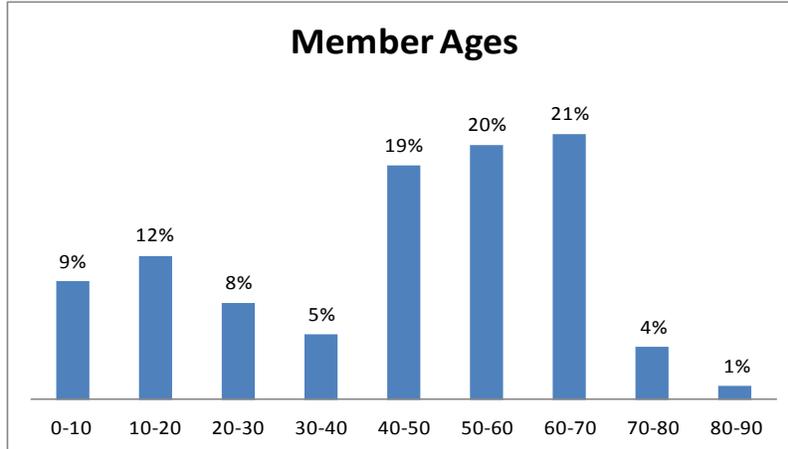
*(Please note that the charts and tables included in this plan are based on congregants' responses to the congregation-wide census, the rapid survey conducted with 79 members who reflected congregation demographics, and from various large group facilitated gatherings/congregational meetings over 2 years. They reflect the answers of a fairly broad sample of the congregation over several years, but clearly not the entire membership. Notes are included with each to explain their origin.)*

*Havurah Hazon committee participants have been: Adela Basayne (chair), Miryam Brewer, Rich Eichen, Barbara Hein, Debbi Nadell, and Sam Sirkin.*

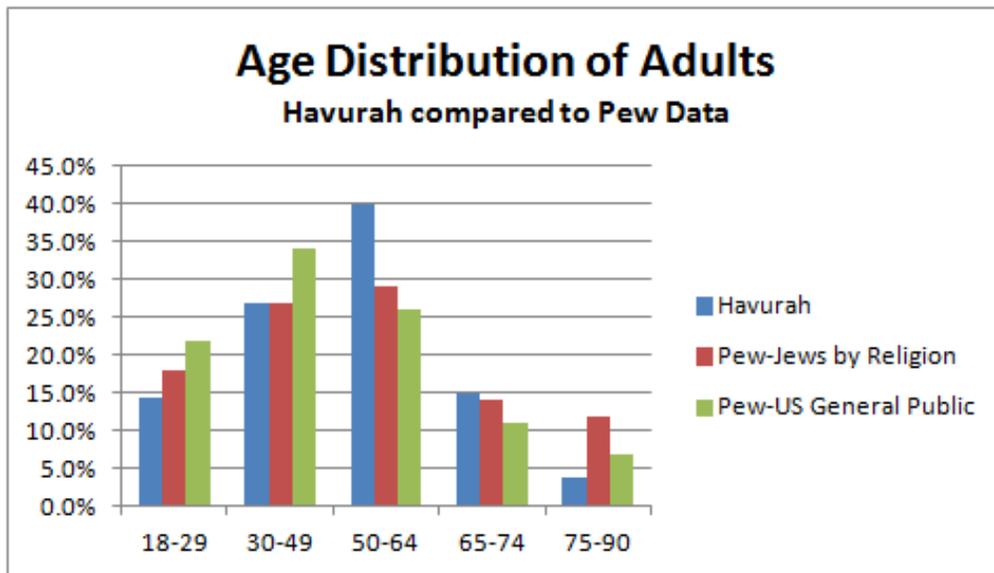
**Findings: Kehillah (Community and Culture)**

***Today and Tomorrow***

**How old are we?**



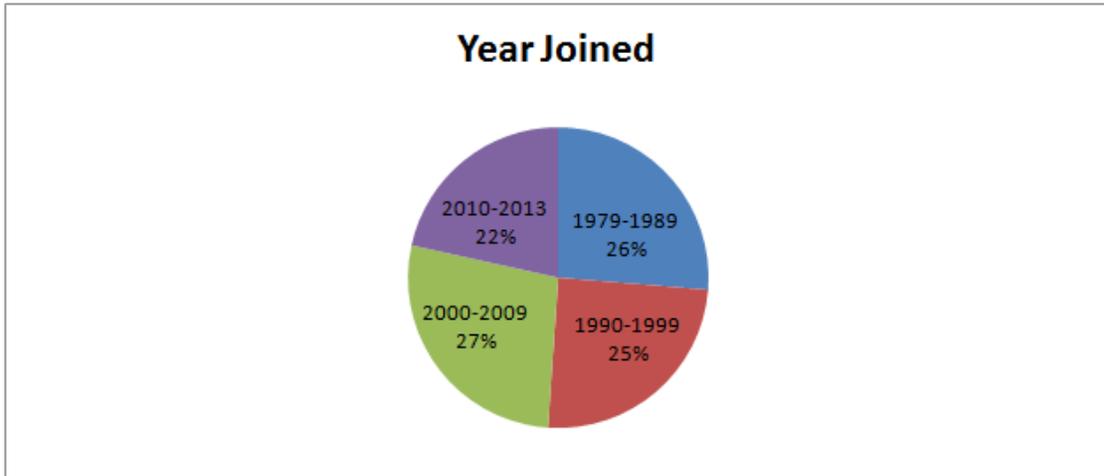
*This data comes from the Havurah Census, completed by 274 member families, and from additional data available through the Havurah Shalom Membership database. The total represents approximately 85 – 90% of our membership. Note that adult children were included in many census responses, so the data in the 20-30 category includes our adult children who are part of their parents’ membership.*



*This data comes from the same sources as the chart described above. The Pew Data refers to the study ‘A Portrait of Jewish Americans’ released by the Pew Research Center on October 1, 2013.*

We have a large cohort (40%) of the community in the 50-64 age range. We need to consider this group’s current role, activities, support, accommodations they may need, and impact and plan for their aging.

**How long have we been members?**



*This data comes from the Havurah Census, completed by 274 member families in the summer and fall of 2013.*

Based on the census data, ¼ of the congregation are “old-timers” (25 years or more) and ¼ are relatively new members (under 4 years as members).

**How diverse are we?**

Race and/or Ethnicity	Percent
White	91.30%
Other	5.80%
Hispanic or Latino	1.45%
Mixed race	1.45%
Black or African American	0.00%
Native American	0.00%
Asian	0.00%
<b>Total</b>	<b>100%</b>

*This data comes from the respondents to rapid polling at the Havurah Retreat in March 2014.*

## Havurah Shalom Hazon: Long Range Plan – 2014 to 2019

The Havurah Census asked the question, ‘Does your house identify in any of the following ways?’ Respondents could choose more than one answer. This table shows the answers chosen. Multiple responses were allowed.

Multi-Cultural	7%
Multi-Racial	8%
LGBTI	8%
Empty Nester	27%
Single Parent	8%

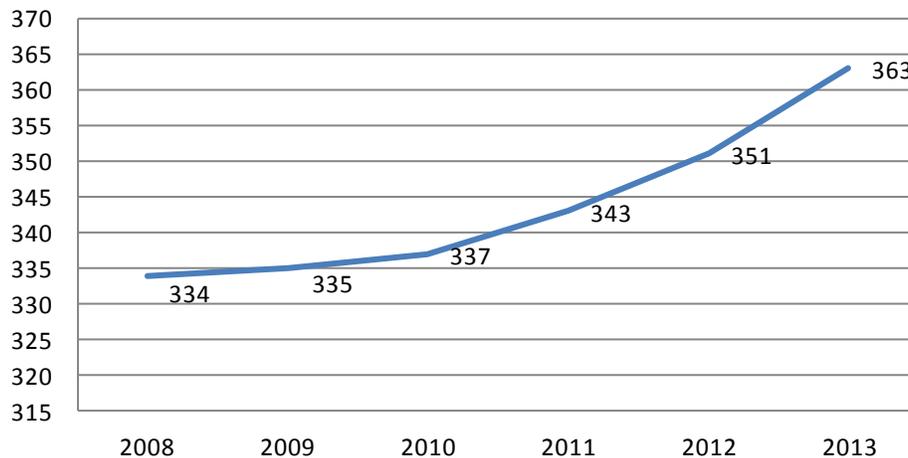
*This data comes from the Havurah Census, completed by 274 member families in the summer and fall of 2013. (Worthy of note is the fact that the rapid poll participants somewhat match the census with respect to percent of diverse participants or multi-racial households)*

We are not very diverse in our membership. We embrace the diversity we do have, and strive to be ever more inclusive. We support issues of equity in the larger Portland community.

### **We are growing**

Since the recession ended, we have seen a steady growth in membership. We have a healthy number of members of long duration, although we experience attrition every year. We believe we fall within the normal rate of attrition for congregations. Even with this attrition, we are still growing.

### **Membership Growth 2008-2014**



### **How well are we integrating and connecting members?**

Many new members have been attracted by, and are very involved in, Shabbat School and other activities related to educating, engaging and involving kids. Anecdotal data from the last three years finds that 75% of our new members have pre-school and elementary school aged children, with many stating their primary reason for joining is to participate in Shabbat School. As with the general population, people are waiting longer to have children, so the age of the parents of these families is in the 40 - 50 year old range.

## Havurah Shalom Hazon: Long Range Plan – 2014 to 2019

Newer members continue to feel less enfranchised, and uncertain about how to participate in the life of the congregation. In addition, life-stage and age cohorts have differing engagement with Havurah and the Havurah community. This has created a kind of “silo” dynamic – age , life-stage and interest cohorts are, to some degree, isolated from and unfamiliar with each other.

Havurah needs to develop/encourage strategies that create more cross-connects including involving Shabbat School and Bar/Bat Mitzvah kids and parents in other activities – like Tikkun Olam, Spiritual Life/Services, Governance.

At the time of this writing, a committee is looking at the ways communication and technology can be used to improve congregational connection.

Reasons for families dropping their membership are also recorded. Close to half of the members who have dropped in the last five years have kids who are college-aged or older. Many of these dropping members reported during their exit interviews that they were no longer involved with the congregation. Families with school aged children give as one of their top reasons for leaving that they are moving away from the Portland area. Others drop their membership because the parent co-op model of Shabbat School does not work for their families. Although exit interviews are confidential, we encourage continued attention be paid to the aggregated reasons people chose to leave Havurah.

### **What accommodations do we need?**

Very few member families have members that need accommodations for disabilities today. As we age, we can expect to have to make more accommodations.

<b>Accommodations</b>	<b>Percent</b>
No need	95.9%
Hearing	2.6%
Vision	0.4%
Mobility	1.1%
	100.0%

*This data comes from the Havurah Census, completed by 274 member families in the summer and fall of 2013.*

We realize there are disabilities in our member families that we did not include in the census queries. These disabilities could include neurological, sensory, psychological and learning disabilities that need to be understood and accommodated. Discussions have begun and meetings are planned at the time of this writing to address inclusion at all levels of congregational life. There may be costs associated with adequately including members with different abilities.

## Havurah Shalom Hazon: Long Range Plan – 2014 to 2019

### Where do we live?

According to Havurah membership data, slightly more members live on the east side of Portland than in other areas. The location of Havurah in NW Portland was not cited as an issue by members. In fact, members seemed to be vested in the current location and emotionally attached to the space.

	Number HH		Percent HH		
North	17	187	5%	52%	Eastside
Northeast	144		40%		
Southeast	26		7%		
Northwest	26	152	7%	42%	Westside
Southwest	76		21%		
Western suburbs	50		14%		
Outside of Metro area	14	19	4%	5%	Outside metro area
Vancouver	5		1%		
TOTAL	358		100%		

*This data comes from the Havurah Membership database information, as of fall 2013.*

### Where do we come from, Jewishly?

The Havurah Census asked the question, ‘Does your house identify in any of the following ways?’ Respondents could choose more than one answer. This table shows the answers chosen. Because multiple responses were allowed, we can assume that the percentages below reflect the percentages of households that include members who identify in the 3 categories – Jews by Birth, Choice and Interfaith.

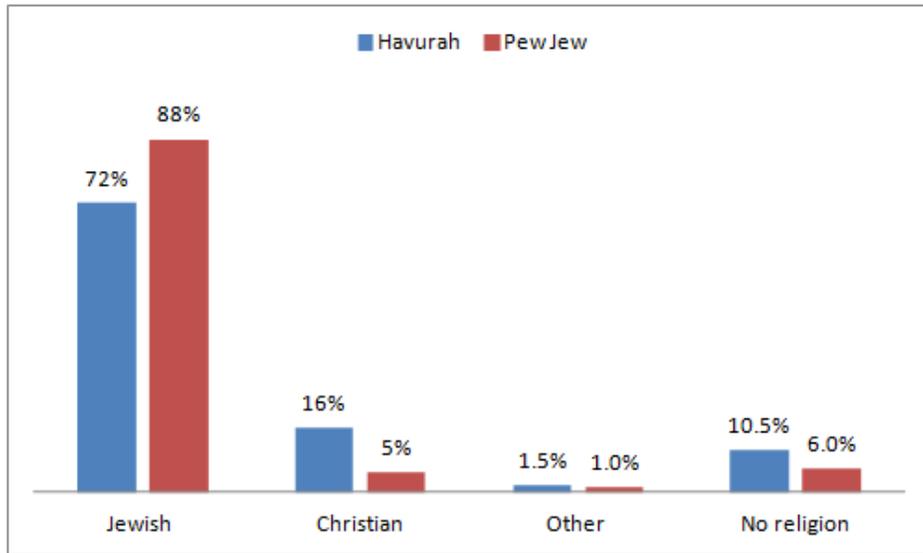
	Percent
Jews By Birth	86%
Jews by Choice	22%
Interfaith	35%

*This data comes from the Havurah Census, completed by 274 member families in the summer and fall of 2013.*

## Havurah Shalom Hazon: Long Range Plan – 2014 to 2019

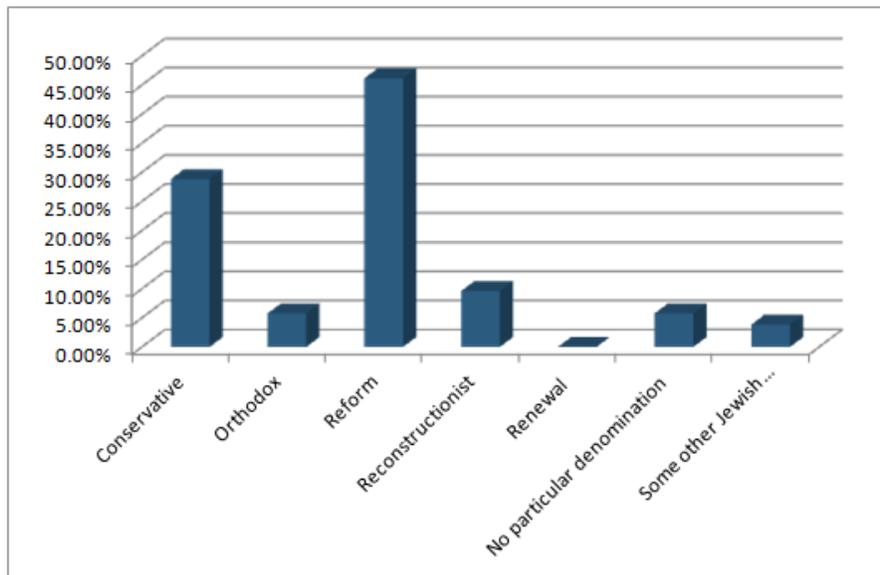
A larger percent of Havurah members were raised in another religion than reflected in the Pew Survey.

### How were we raised religiously vs. Pew Study



*This data comes from 79 respondents to rapid polling at the Havurah Retreat in March 2014. The Pew Data refers to the study 'A Portrait of Jewish Americans' released by the Pew Research Center on October 1, 2013.*

Almost half of the current Havurah members who were raised Jewish were brought up in the Reform tradition. The following chart shows the breakdown for members who were raised Jewishly.



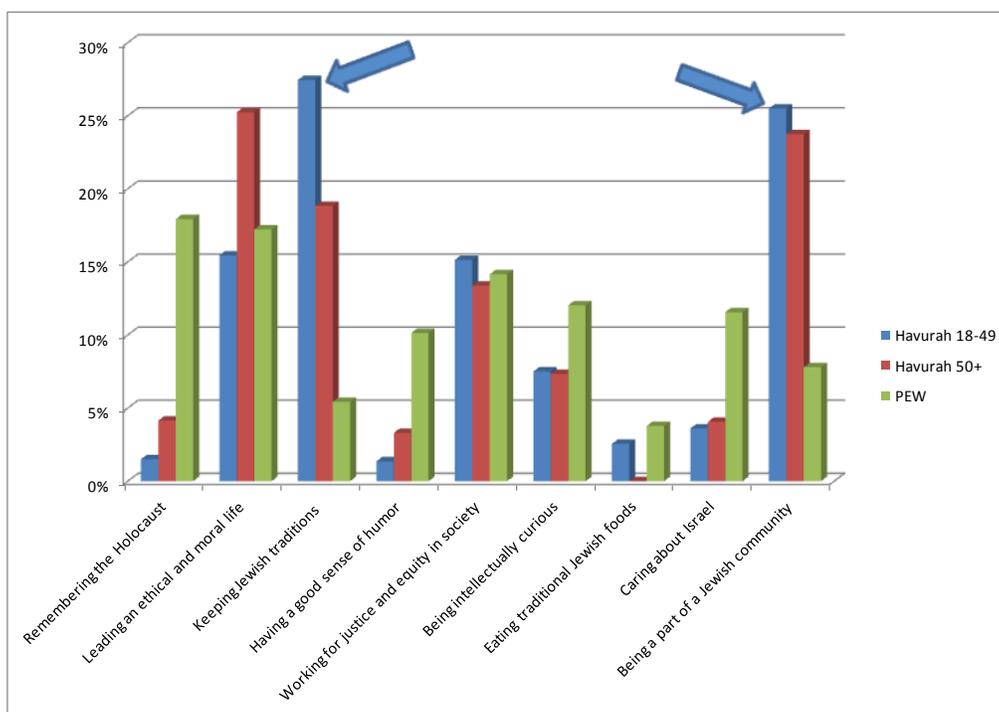
*This data comes from 79 respondents to rapid polling at the Havurah Retreat in March 2014. The Pew Data refers to the study 'A Portrait of Jewish Americans' released by the Pew Research Center on October 1, 2013.*

**How do we experience Jewishness?**

Our rapid polling at the March 2014 Retreat asked several questions similar to those asked in the recent Pew Survey. The following table reflects Havurah members’ answers to the question ‘How important are each of the following to what Being Jewish means to you?’

**How important are each of the following to what BEING JEWISH means to you?**

*[Note: this graph is based on a priority ranking weighted voting – the %s reflect a relative degree of importance not the % of participants who made this selection]*



*This data comes from 79 respondents to rapid polling at the Havurah Retreat in March 2014. The Pew Data refers to the study ‘A Portrait of Jewish Americans’ released by the Pew Research Center on October 1, 2013.*

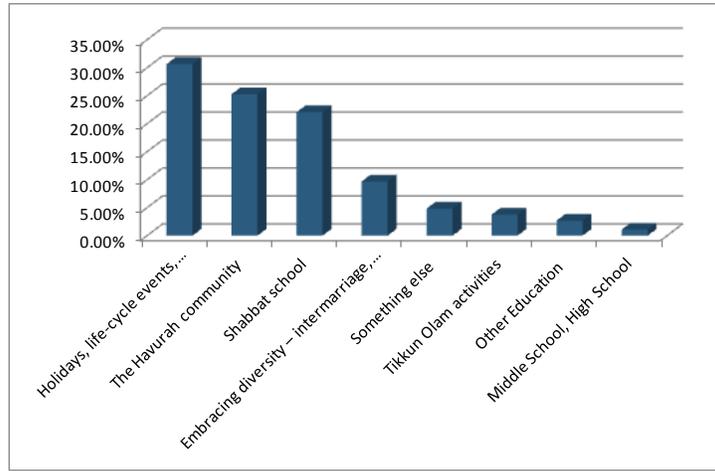
Havurah members as a whole feel strongly about keeping Jewish traditions and about being a part of a Jewish community – outpacing the Pew Jew by a factor of 5 or 6, with the younger cohort feeling it’s more important than the older cohort. In contrast to the Pew results, Havurah members place low importance on remembering the Holocaust and caring about Israel.

Members overwhelmingly value being a part of a Jewish community. People joined Havurah and are still here because of community and interest in celebrating/marketing life-cycle events and holidays in the community. Answers to these questions are reflected in the following two charts.

# Havurah Shalom Hazon: Long Range Plan – 2014 to 2019

## Pick up to 3 reasons why you JOINED Havurah (when you joined)

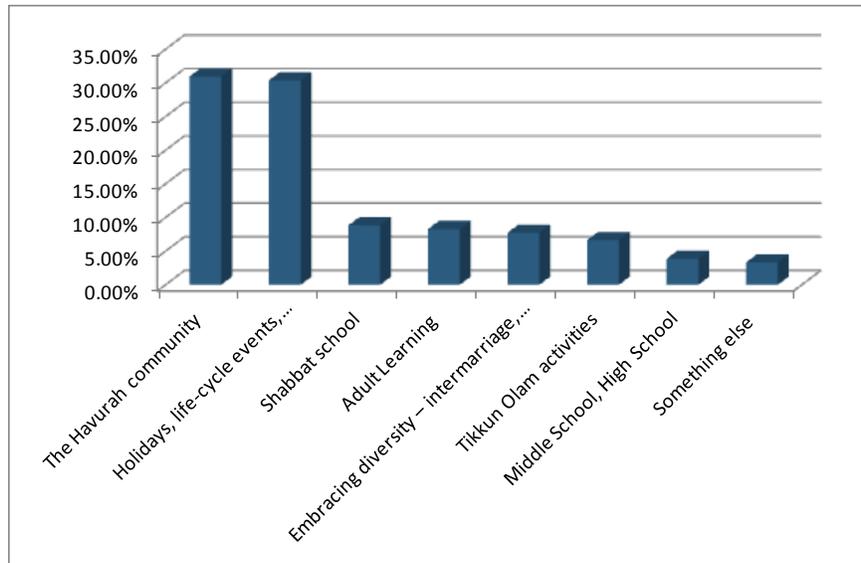
[Note: this graph is based on a priority ranking weighted voting – the %s reflect a relative degree of importance not the % of participants who made this selection]



This data comes from 79 respondents to rapid polling at the Havurah Retreat in March 2014.

## Pick up to 3 reasons why you ARE STILL at Havurah

[Note: this graph is based on a priority ranking weighted voting – the %s reflect a relative degree of importance not the % of participants who made this selection]



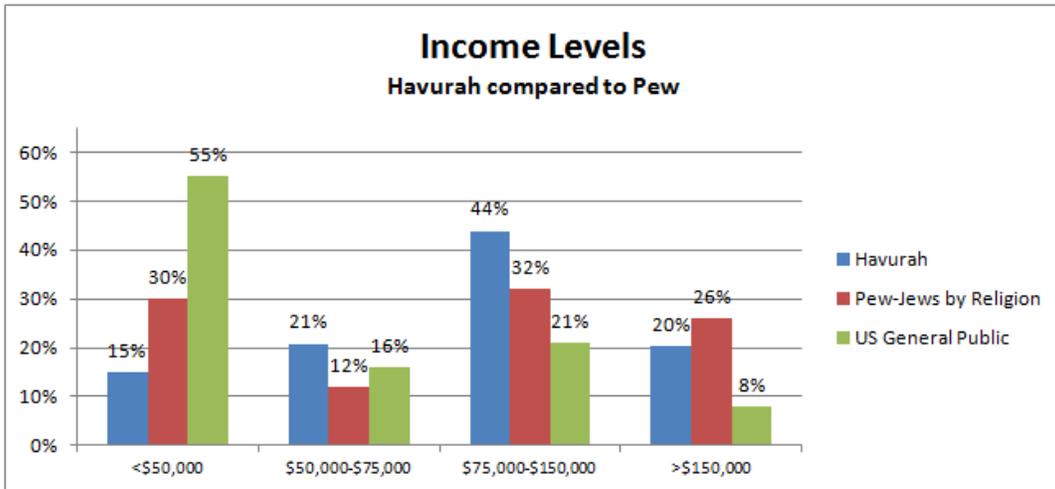
This data comes from 79 respondents to rapid polling at the Havurah Retreat in March 2014.

**How are we outliers in Jewish congregational trends?**

Futurists have pointed to dropping interest in “joining” and the need to create more “virtual”, local, even “pop-up” gatherings. Havurah members are joiners and repeatedly express their focus on being part of a community and in gathering together. Havurah has hosted several ‘pop up’ type events, including Tu B’Shevat hikes, “Shabbat in the Park” and “Shabbat in the Pool”.

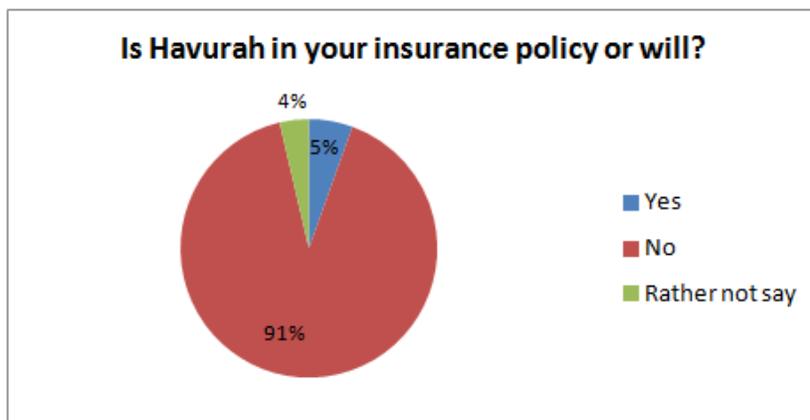
**How are we financially?**

Havurah community members are doing okay financially, in general, with a larger cohort in the middle and upper middle income ranges and smaller cohort in the lower range compared to the Pew Jew and US General Public.



*This data comes from the Havurah Census, completed by 274 member families in the summer and fall of 2013. The Pew Data refers to the study ‘A Portrait of Jewish Americans’ released by the Pew Research Center on October 1, 2013.*

There is not a culture of ongoing fundraising at Havurah. As a result, Havurah has very limited financial reserves. Very few Havurahniks consider Havurah for their charitable giving beyond the payment of dues, or have included Havurah in their will or as a beneficiary.



*This data comes from the Havurah Census, completed by 274 member families in the summer and fall of 2013.*

## Havurah Shalom Hazon: Long Range Plan – 2014 to 2019

### **What do we value?**

At the March 2014 Retreat, attendees met in small focus groups with their age cohort. They were asked to describe the essence of Havurah. Several descriptions were brought up consistently by all cohorts, regardless of age or length of membership. This list includes:

- sense of inclusiveness
- supportive, welcoming nature
- high level of connection
- non-judgmental, open to people from different Jewish backgrounds
- embracing our LGBT members, and non-Jewish partners
- diversity in membership
- strong culture of ownership -- we can make it happen here
- informality - casual dress, lack of pretentiousness
- creative and innovative -- we keep reinventing ourselves
- opening our community to others during High Holidays

At a number of participatory sessions prior to the retreat, attendees were asked about Havurah's values. The values we most care about and want to make sure we carry into the future are our:

- inclusivity
- transparency
- participation
- vibrancy
- solvency
- grass roots-ness
- freedom to try new things
- heart & spirit
- commitment to a comfortable space of our own
- equity
- equality
- courage
- optimism
- relevance
- adaptability
- commitment to lifelong learning
- music

Continuing the Havurah legacy is also important to members -- the first wedding of Havurahniks and the first Bar/Bat Mitzvah of Havurah youth have been significant milestones. We are really proud of our second generation Havurahniks.

### **How are we connecting with the greater Jewish community?**

Havurah as a whole has not attended to creating connections with the greater Portland Jewish community, although we are now participating more than previously. Individual members are serving on Boards, and Havurah is being included more in community events. Havurah members have also been instrumental in the creation of new Portland-based Jewish organizations focused on the arts and social justice. Exposure to the larger Portland Jewish community will increase our connection and participation.

## Havurah Shalom Hazon: Long Range Plan – 2014 to 2019

One percent of Havurah members are also members of another synagogue and the table below shows top reported memberships/affiliations that member families maintain with Jewish organizations other than Havurah. What does this say about our connections to the broader Jewish community and other organizations?

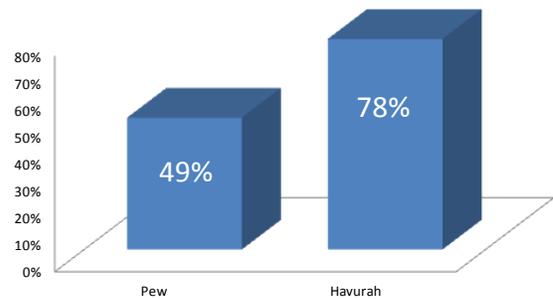
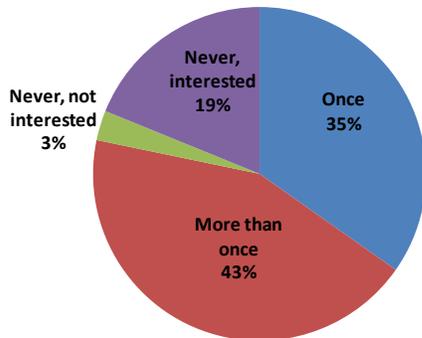
Memberships	
Organization	Percentage
Jewish Federation	11%
Oregon Jewish Museum	10%
MJCC	8%
Hadassah	8%
None	7%
J Street	5%
Cedar Sinai Park	5%
National Council of Jewish Women	5%
PJA	3%
U.S. Holocaust Museum	3%
American Jewish World Service (AJWS)	2%
B'Nai Brith Youth	2%
Congregation Neveh Shalom	2%
Institute for Judaic Studies	2%
Morasha/Melton	2%
Jewish Family & Child Services	2%

*This data comes from the Havurah Census, completed by 274 member families in the summer and fall of 2013.*

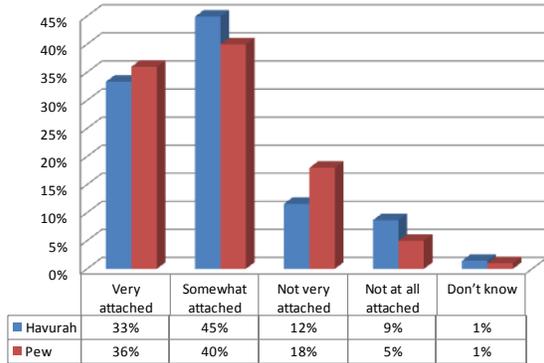
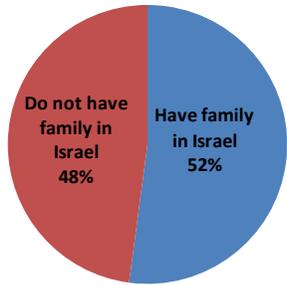
### How are we thinking and feeling about Israel?

Almost 80% of members have been to Israel, over 50% have family there and 78% feel attachment - either some attachment (45%), or strong attachment (33%).

#### Israel – been there?



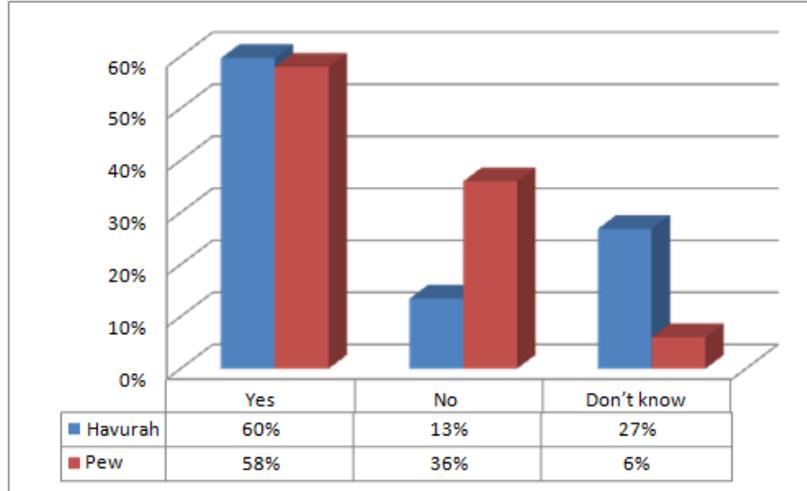
**Israel – Connections and Attachment**



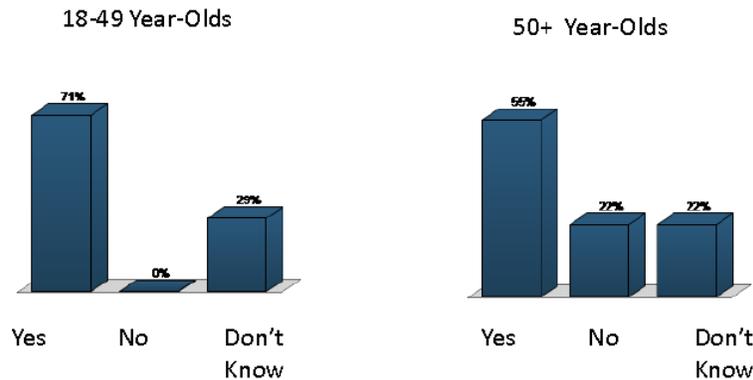
*This data comes from 79 respondents to rapid polling at the Havurah Retreat in March 2014. The Pew Data refers to the study 'A Portrait of Jewish Americans' released by the Pew Research Center on October 1, 2013.*

We're more optimistic about a two-state solution than the Pew Jew and the younger cohort is more optimistic than the older at Havurah.

**Do you think a way can be found for Israel and an independent Palestinian state to coexist peacefully with each other?**



**Do you think a way can be found for Israel and an independent Palestinian state to coexist peacefully with each other?**



*The data in the two charts above comes from 79 respondents to rapid polling at the Havurah Retreat in March 2014. The Pew Data refers to the study 'A Portrait of Jewish Americans' released by the Pew Research Center on October 1, 2013.*

**Implications of Kehillah Findings**

**For the Rabbi**

At the time of the development of this plan, our current rabbi has less than three years before retirement. A rabbi search committee is at work, and will use this document as guidance.

The congregation has indicated that we want our religious leader to be someone who will engage with the members of the congregation and be present at Havurah activities. Our rabbi should embrace the diversity of our community and be able to navigate among the varied non-traditional groups and cultures.

Our rabbi should collaborate with lay leadership to determine Havurah's role in the greater Jewish community. Our rabbi needs to be able to address/relate to younger families and the large cohort of founders and old-timers who are aging with the congregation.

Pastoral care consumes a large amount of the rabbi's time. As our congregation grows and ages, this is only natural. We need to find avenues to meet the burgeoning need and prevent it from overwhelming the rabbi. Almost 20% of Havurahniks are helping professionals, skilled and willing to help in caring for congregants.

The congregation has a connection with and concern for Israel, and continues to wrestle with the painful dilemmas the current situation presents.

**For the Staff**

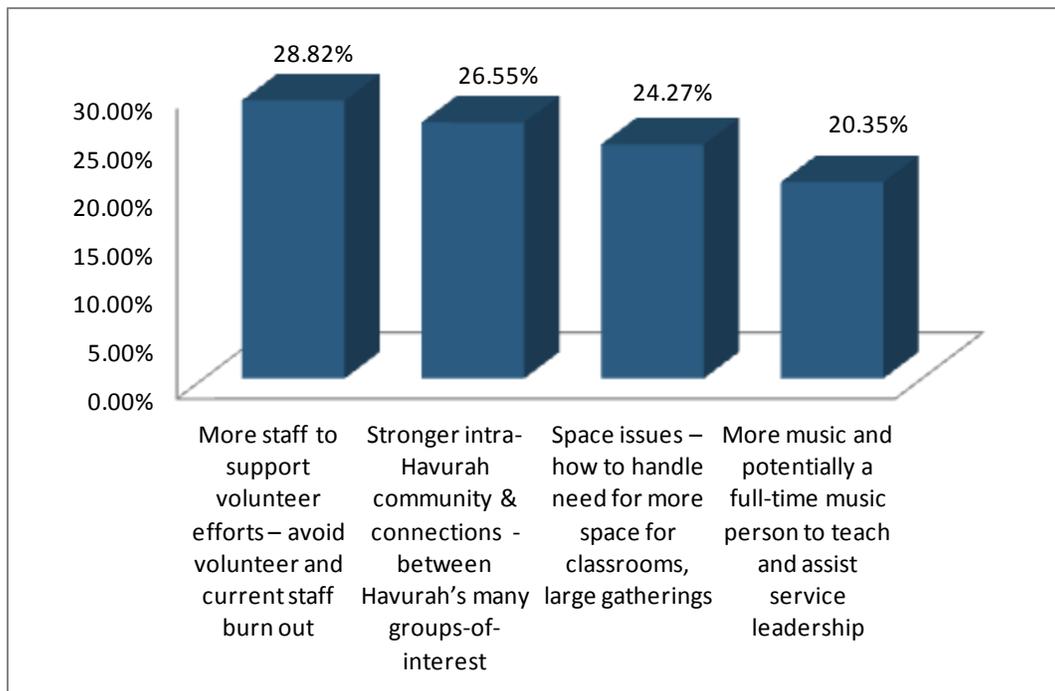
Participation is a core value of community. We want staff to help organize, guide, engage, and connect members, but not to become the focal point of all programming. Integration of new members is important, as is the need for opportunities to reach beyond the 'silos' referred to earlier. Many of us want to participate in more activities and we don't have the time ourselves to pull committees together, to arrange the logistics of meetings, or to publicize the event. Staff support for these logistical needs would enable members to more fully engage with others in the community.

## Havurah Shalom Hazon: Long Range Plan – 2014 to 2019

The community's desire is to balance the workload between staff and volunteer efforts. A recent example of this is the decision to hire a bookkeeper to free the 7 volunteers previously keeping the books to be involved in other congregational service.

### Rank Top Emerging Priorities

*[Note: this graph is based on a priority ranking weighted voting – the %s reflect a relative degree of importance, not the % of participants who made this selection]*



*The categories in this chart were elevated at the community gathering in October 2013. This data comes from 79 respondents to rapid polling at the Havurah Retreat in March 2014.*

### For Space

Our current building serves us well about 95% of the time. The community seems more than content with what we have created within our space. Members love the informality, design and versatility of the Beit Knesset. Our children know the space is their space. Based on what we see happening in other Portland congregations trying to support large edifices in the face of dwindling membership, Havurah feels proud of the choice we made to renovate a smaller space.

We currently have an Ad Hoc committee working on gathering information about when we actually have space issues -- is it just during Shabbat School, or other times? We can't accommodate the entire Shabbat School in the building. We are limited in the number of adult education classes we can offer on Wednesday nights. We believe we can supplement the space we have without creating a deep imbalance in our finances, and this will take some time.

Besides Shabbat School, the space is constraining once or twice a year, at Hanukah or another special event. An increase in staff will necessitate an increase in office space. Additional space would have additional costs

## Havurah Shalom Hazon: Long Range Plan – 2014 to 2019

associated with it, though we may be able to subsidize that space with a weekday income producing use, like a pre-school combined with a Limud annex.

As the congregation has grown, and the occupancy of the neighborhood around the Beit Knesset has increased, the parking for congregants has become scarce. We had an informal understanding with the medical building one block to the north of us for Friday night and Saturday mornings that is no longer in force. Parking on weekdays or Saturdays for longer than two hours requires creativity, walking, or paying.

### **For Funding**

We are not involved in 'plaque' Judaism. We are proud of our engaged, purposeful, conservative budget process. Longtime members are also proud of the community effort that resulted in the purchase and retrofit of our building.

We are a heavily dues dependent organization. We collect approximately 70% of the full dues amount we'd have, if not for adjustments. As a result, growth in membership alone will not provide adequate funding for the growth in programming that growth in membership will require, let alone the desired programming identified in the planning process. Families pay additional fees for Shabbat School, Middle School and High School, yet all education programs are subsidized by the general operating budget rather than self-supporting.

Based on the input received at various community gatherings, members are comfortable with our current funding structure, but also understand that additional staffing or space will require additional funds. We need to be mindful about how we go about transitioning into a community that fundraises on a more regular basis. Members don't see us as a 'big money' congregation and don't think they would be comfortable in a community that treats people differently -- implicitly or explicitly -- based on what they contribute.

When we encourage members to think creatively about what we might do, and we develop programming to bring people together, we also need to think innovatively about how to sustain programs and funding for programs at their outset.

There are implications for building a reserve/endowment as members consider estate planning, and Havurah needs to be able to welcome and accommodate members across the income spectrum.

### **For our Governance Structure**

In the community gatherings and focus groups at the retreat, members repeatedly said, "We like our non-hierarchical structure."

We need to do a better job of growing leaders. People value that we are participatory, but that doesn't always translate to them stepping up to take on leadership roles. We need to do more to reach out to people who aren't as involved and find places for them to step in. Some areas seem closed off to people who want to join.

We should consider hiring a consultant to advise Steering/Exec on transparency as well as board and leadership development.

We need to educate members on how to use Havurah's leadership and governance structure. Continuous communication is needed about how our governance structure functions and how members can plug into the

## Havurah Shalom Hazon: Long Range Plan – 2014 to 2019

structure. More transparency around decision making should lead to a more comfortable relationship with leadership, translating into members feeling positive about taking on a greater role themselves.

### **For Music**

Music ties us together and is a fundamental aspect of our participatory community. Celebrations are musically infused. We appreciate our many musicians and the efforts they make to bring music to so many events. More music is always welcome.

We need to do a better job teaching music to our children since it is an important part of our culture.

### **Kehillah Vision and Strategies**

*Havurah Shalom members feel connected across generations and different cohorts. Members are committed to participating to ensure that organizational needs are met.*

Strategies:

- Develop and support strategies that gracefully integrate new members
- Create opportunities for cross connection between Shabbat School families and other age groups through spiritual activities and Tikkun Olam
  - Recommended Action: Provide additional staff/staff time to support connections
- Increase music at all events
  - Recommended Action: Provide additional opportunities for informal music participation
  - Recommended Action: Provide additional opportunities for music learning
  - Recommended Action: Provide additional staff/staff time to support music
- Organize smaller Havurot, intergenerational or neighborhood groups for Shabbat and holiday celebrations
  - Recommended Action: Provide additional staff/staff time to support the development of small groups
- Continue to develop programming focused on the empty nester cohort
- Leverage current technological tools to help organize and support volunteers

### **Findings: Avodah (Spiritual Life and Religious Practice)**

#### ***Today***

Currently we have a very successful Kabbalat Shabbat dinner and service on the 2<sup>nd</sup> Friday night of the month, ten months of the year. We regularly have over 100 attendees at these musically infused services, with close to that many at the Shabbat dinner beforehand.

We have a regular weekday Minyan on Wednesday mornings, supported by a loyal group of 10-15 regular attendees, and another 10-20 occasional attendees. On Shabbat morning, we have a variety of services, including B'nai Mitzvah, minyanim focused on youth and families, a spiritual, meditation based minyan several times a year, and a regular community minyan on other Shabbatot. The Spiritual Life Committee works hard to ensure a Minyan every Shabbat, though some weeks we fall short on attendees. We are proud that services in general are vibrant.

## Havurah Shalom Hazon: Long Range Plan – 2014 to 2019

We continue to open our Rosh Hashanah and Yom Kippur services to the greater Portland community. Many members are involved with the planning and liturgy of these services. We are proud that our youth are also a significant part of the High Holidays. In addition, our Family Rosh Hashanah and Yom Kippur services are attended by hundreds, including many from outside the Havurah community.

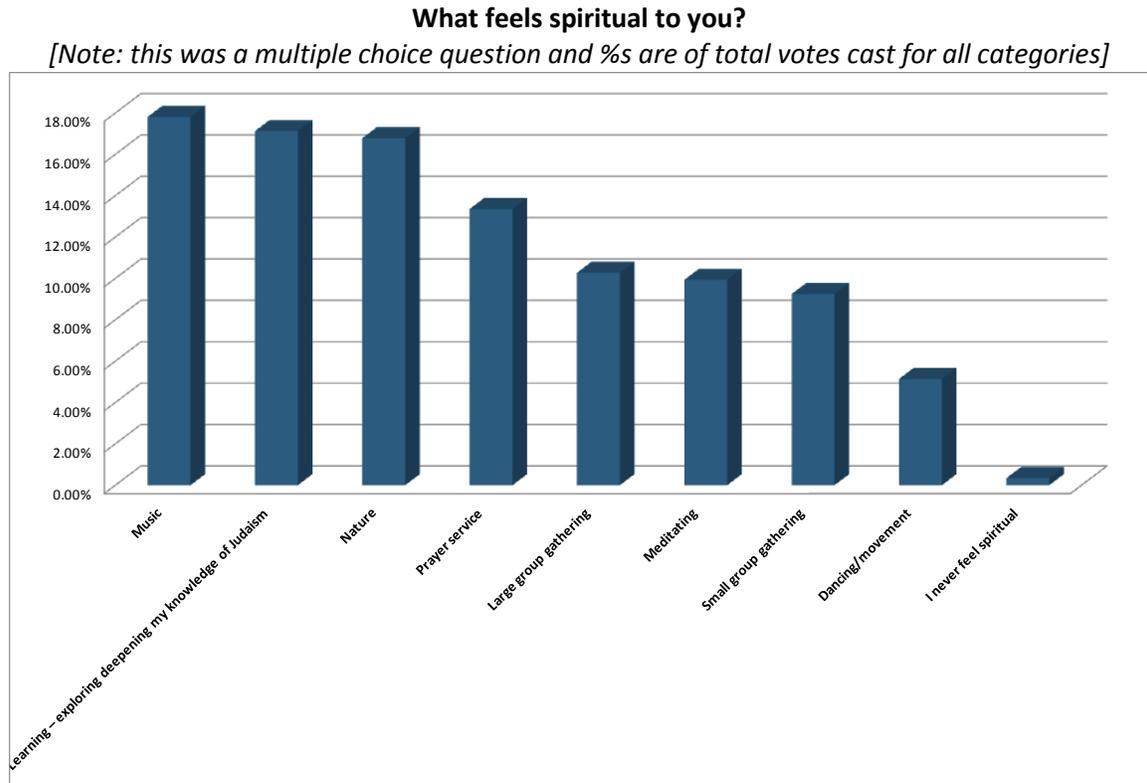
We are proud that our High Holidays are open to the public every year and that many Havurah members learn about our community through attending these celebrations.

Annual Holiday celebrations include: Sukkot, Simchat Torah, Hanukkah, Purim, and a Community Seder on the second night of Passover. Different groups of people are tapped to support these events.

Community led services are important to the community, yet we have trouble finding service leaders and often in finding a minyan. We don't do much proactively to train service leaders or to help people feel more comfortable leading whole or partial services. Almost all of our lay service leaders gained their fluency with services outside of Havurah, either in childhood or with private tutors. We are inconsistent in involving kids post B'nai Mitzvah in service leadership.

Staff perceives that the size of the congregation is beginning to make community wide celebrations uncomfortable for some members.

Music is central to our spirituality.



*This data comes from 79 respondents to rapid polling at the Havurah Retreat in March 2014.*

## Havurah Shalom Hazon: Long Range Plan – 2014 to 2019

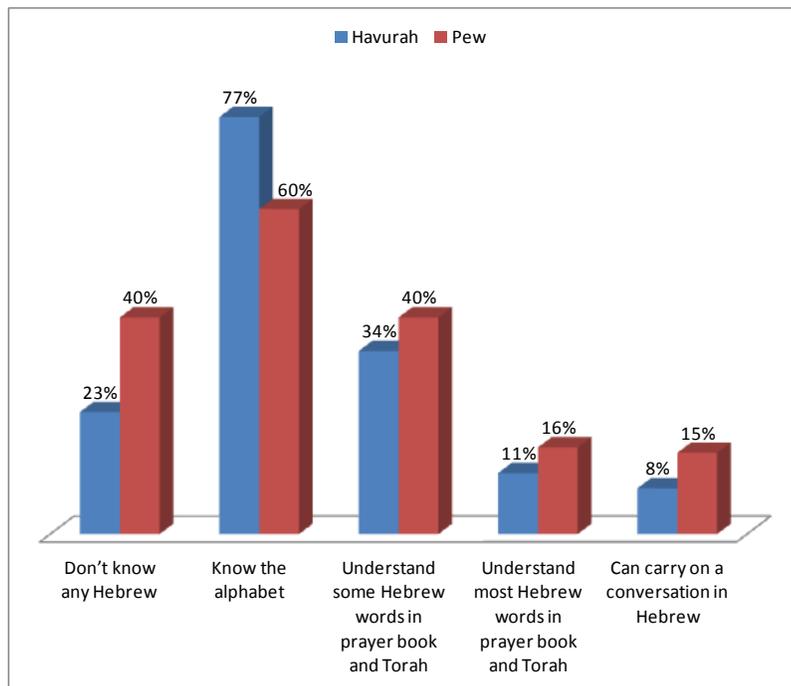
There is strong support for maintaining weekly services with Shabbat morning services (80%) leading, followed by Friday evening (74%) and Midweek (47%).

Service Type	Important	Level of importance			
		Very	Somewhat	Indiff	Not
Friday evening	74%	24%	50%	21%	4%
Shabbat morning	80%	49%	31%	14%	6%
Midweek	47%	24%	23%	34%	19%

*This data comes from 79 respondents to rapid polling at the Havurah Retreat in March 2014.*

### How well do we know Hebrew?

Havurah members have more basic Hebrew and less advanced Hebrew knowledge when compared with the Pew Jew. Some members stated in community gatherings that they are intimidated by the traditional nature of our Saturday morning services and the amount of Hebrew we use.



*This data comes from 79 respondents to rapid polling at the Havurah Retreat in March 2014.*

### ***Tomorrow***

Parents are comfortable bringing their children to services and events and want to continue to feel that their kids are welcome at all Havurah events.

To increase the vibrancy of Shabbat morning services, we need more music more consistently, as well as a consistent and predictable frequency of services.

We need to increase the accessibility and comfortable nature of services for new Hebrew learners. One part of this increase will be to continue to encourage regular family participation at services.

We will be using technology to support learning and participation in services, by posting music on the website. We now have the ability to stream both Kabbalat Shabbat and Saturday morning services. We are developing an app that will allow us to know who will attend minyan.

We would like more than one Friday night service, regularly, each month. We should continue to encourage committees, Shabbat School classes, and other affinity groups to organize and lead Friday night services throughout the year.

### **Implications of Avodah Findings**

#### **For the Rabbi**

We don't rely on our rabbi to lead all services or be the only expert on spiritual matters within the congregation. It's important to us that members can lead and take responsibility without having the Rabbi as the central figure.

We want our rabbi to engage with the broader Jewish community and to connect with both Jewish and non-Jewish clergy, and to engage in interfaith dialogue.

#### **For the Staff**

According to Reconstructionist Movement research, congregations above the size of 350 families typically employ an associate rabbi. We need a professional who can be an educator in the area of spiritual life and spiritual practice for youth and young families. This might be a full time music leader who helps lead services and encourages others to lead. Staff does not currently have time available considering other obligations, to implement programming in the area of spiritual life and practice for youth and young families. If we were able to provide support in this area, familiarity with our services would likely increase members' level of comfort and participation.

#### **For Space**

If the goal is to increase intimacy among congregants, providing a larger meeting space will not provide the solution. To have smaller groups meet for Shabbat and holidays, we will need to return to home based gatherings, with staff support to organize them.

### **For Funding**

We need to provide funding for the religious professional referred to above.

### **Avodah Vision and Strategies**

*Havurah Shalom members' spiritual lives are suffused with meaningful Jewish rituals and communal practices which they help to shape.*

Strategies:

- Expand the pool of service leaders by providing training and mentoring
  - Recommended Action: Consider having a staff position that is a blend of education in ritual practice and service leadership.
- Strengthen use of music in ritual programming
- Increase the accessibility and comfortable nature of services for new Hebrew learners.
- Maintain regular Shabbat morning service, weekday Minyan and frequent Friday night services
- Support holiday celebrations that engage diverse cohorts
- Connect families in the Shabbat School program to Shabbat services and holiday rituals
  - Recommended Action: Shift a certain number of Shabbat School classes each year to meet at Saturday morning services, to increase attendance at services as well as increase familiarity with the service.
  - Recommended Action: Consider having a staff position that is a blend of education in ritual practice and service leadership.
- Maintain strong Tot Shabbat and holiday programming for families with young children
- Engage B'nai Mitzvah families (pre- and post-) in a connection with Shabbat morning services

### **Findings: Limud ( Education and Life Long Learning)**

#### ***Today***

We are proud of our unique Shabbat School program -- parents learn, plan together and then teach. The Shabbat School program provides a model of lifelong learning for our children. Shabbat School covers students in kindergarten through 6<sup>th</sup> grade. In addition, we have a Hebrew program with professional teachers that provides basic decoding and some prayer education, starting in the 3<sup>rd</sup> grade.

Shabbat School and the Hebrew program meet 17 or 18 times a year. While Shabbat School creates a positive experience of Jewish learning for our children, it's not heavily focused on academic Jewish learning. One of the primary goals of Shabbat School is to build community, and member feedback indicates that we are successful and proud of the effort. Basic Jewish skills are learned, but we have only a basic Hebrew program with no B'nai Mitzvah skills or preparation. Havurah families hire private tutors to provide that training.

In the past, regular and routine attendance and participation in services was required as a central part of B'nai Mitzvah preparation. We currently have no such requirement. .

Our Middle School program is a combination of parent taught and paid teaching, meeting about 12 times a year. Havurah High School meets over 20 times a year with a paid teacher. Both programs vary in quality in any

## Havurah Shalom Hazon: Long Range Plan – 2014 to 2019

given year, depending on the number of students, the strength of the teaching, the programming beyond weekly class meetings, and on the committees coordinating the programs. We are proud about providing ongoing learning opportunities for our teens.

Congregants brought forward no concerns about the Adult Education Program. Many of our Adult Ed classes are well attended, with a new Adult B'nai Mitzvah class starting every few years and a growing number of members participating each cycle.

We are currently unable to expand education programming on Wednesday nights or Saturdays due to space limitations.

Some members, primarily those involved with Shabbat School, are concerned that we have two 'Havurahs' -- Shabbat School and non-Shabbat School. Members would like to see more integration between these two cohorts.

### ***Tomorrow***

We want to keep lifelong learning as a priority.

We're invested in our cooperative teaching model as a way to create community and support our own learning and connection with our kids.

We need to strengthen families' involvement in services before the B'nai Mitzvah year. In addition, the series of current workshops to support B'nai Mitzvah families can be expanded to include parenting kids in teen years, and how parents identify their personal connections/relationships within Havurah.

## **Implications of Limud Findings**

### **For the Rabbi**

We want our Rabbi to have regular involvement in all levels of youth education; Shabbat School, Bnai-Mitzvah, Middle School and High School. We also want the Rabbi to be active in Adult Education and to challenge us intellectually.

### **For the Staff**

As Shabbat School has grown, parents have wanted more support to make Shabbat School classes successful for kids and the parent teachers. Staff support is also needed for Havurah Middle School and Havurah High School programs, particularly around setting curriculum and working with parent committees on logistics.

### **For Space**

Adequate classroom space for Shabbat School, Lifelong Learning classes, and opportunities for intergenerational connection needs continued attention.

## Havurah Shalom Hazon: Long Range Plan – 2014 to 2019

### **For Funding**

We need funding for administrative support to parent teachers in Shabbat School, beyond the .25 FTE allotted to the Assistant Coordinator of Education. Administrative support should be available across all learning programs.

### **For Music**

Our community wants to learn more of the music that we use at services.

### **Limud Vision and Strategies**

*Members of all ages and experience teach and learn together, in education programs which reflect a personal, engaging approach to Jewish life.*

Strategies:

- Maintain a robust adult education program
- Continue to support our cooperative Shabbat School program and Middle School and High School programs
- Promote inclusive programs that accommodate a range of learning styles
- Continue integration of music into Shabbat School curriculum
  - Recommended Action: Provide opportunities to help our children feel comfortable with the music of our liturgy, holidays and culture.
- Provide adequate space to accommodate class sizes
  - Recommended Action: Research options in the area around Havurah for accommodating Shabbat School classes, which is the primary time we have insufficient space in the building.

### **Findings: Tikkun Olam (Social Justice)**

#### ***Today***

The Tikkun Olam Committee was reconstituted as one of the outcomes of Operation Reconnect. The basic mission of the committee is to encourage and support the diversity of Tikkun Olam activities in the Havurah community. The committee does not serve as a gatekeeper to determine what projects Havurah members might work on. The committee has created a structure for Havurah members to bring ideas forward for evaluation and possible action, with the committee providing support that is within the bounds of the resources of an all-volunteer committee.

Currently, Havurah supports a local non-profit selected by the Tikkun Olam committee during the High Holidays. Several Friday night services during the year focus on local and global issues. Members are interested in Tikkun Olam opportunities that are family friendly, local and action oriented, hands-on service. Advocacy and international activities are of less interest.

The Rabbi is involved in many Tikkun Olam activities along a continuum, from the congregation's activities to broader activities connected to his role as an Oregon clergyperson and as a Rabbi on the national and global stage.

## Havurah Shalom Hazon: Long Range Plan – 2014 to 2019

Members have a sense that Havurah does not take as many social justice stands as we used to, and that there isn't a process for setting a congregation-wide priority project. We have no formal or informal expectation of members for participation in social action, although it is a value we prize.

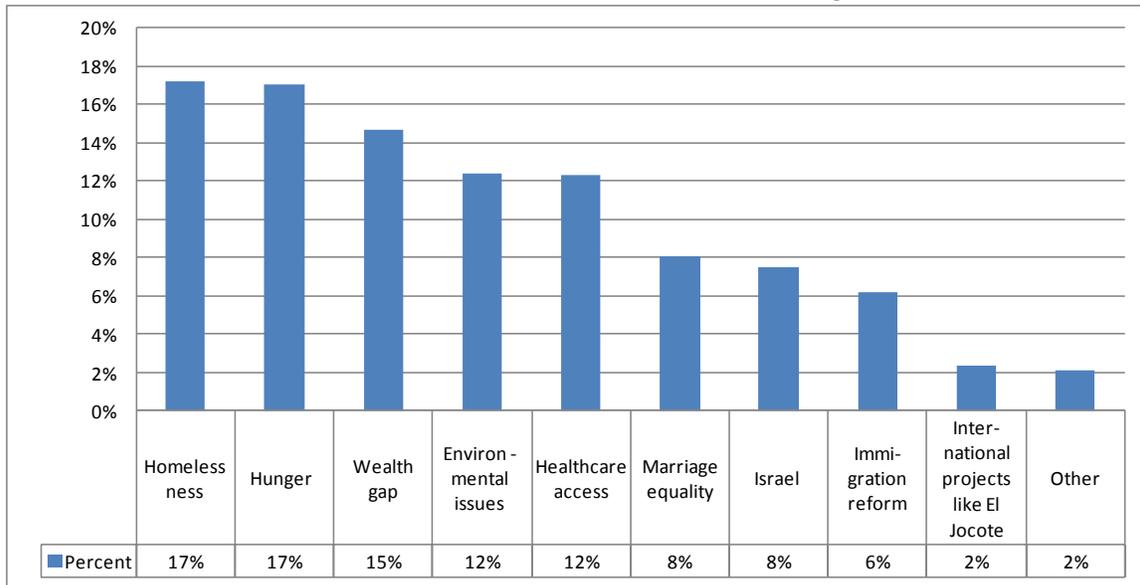
The planning process has identified a gap between the current Tikkun Olam focus and Havurah members' interests. Members are mostly unaware of how to propose projects for congregational action. A result of this is a lower level of participation in Havurah sponsored social justice activities than would be expected from the general profile of our congregants.

We desire a vibrant social action program that engages many members with each other, allows us to live out our values of Tikkun Olam (repairing the world), and builds connection not only within the Havurah community but between Havurah and the community we live in.

There is fairly broad concern and good agreement among congregants on areas of concern with hunger and homelessness at the top.

### What are the top 3 areas of engagement are you most concerned about?

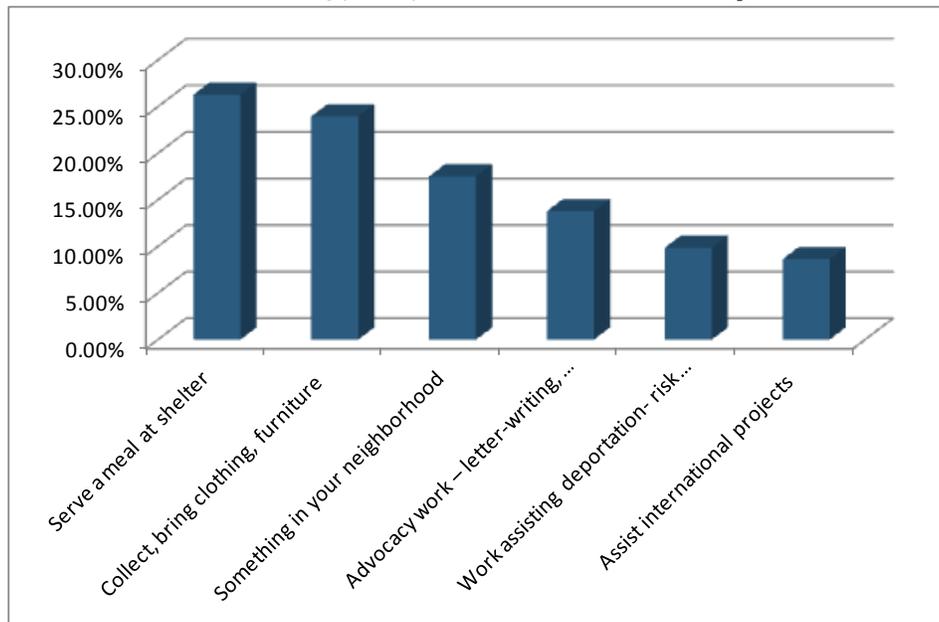
*[Note: this graph is based on a priority ranking weighted voting – the %s reflect a relative degree of importance, not the % of participants who made this selection]*



*This data comes from 79 respondents to rapid polling at the Havurah Retreat in March 2014.*

**List top 3 ways you might choose to get involved**

*[Note: this graph is based on a priority ranking weighted voting – the %s reflect a relative degree of importance, not the % of participants who made this selection]*



*This data comes from 79 respondents to rapid polling at the Havurah Retreat in March 2014.*

Very little Tikkun Olam work has been focused on Israel in the recent past. Though members are personally engaged with Israel on different levels, there has not been a push to make advocacy or support of Israel a primary focus of our Tikkun Olam.

Regarding Israel - Almost 80% been to Israel and over ½ have family there and 78% feel some (45%) or strong (33%) attachment. We're more optimistic about a 2-state solution than the Pew Jew and the younger cohort is more optimistic than the older at Havurah. [See graphs from rapid polling above in Kehillah section]

***Tomorrow***

Tikkun Olam efforts may need to be defined in two separate spheres – one focused on advocacy, and a second on direct action. In addition to members taking a role in organizing for both efforts, some staff support is likely needed to pull together projects for direct action and create the infrastructure for members to participate in those projects.

We should consider creating a method to allow congregational input into a Tikkun Olam theme for each year, with awareness of continuity and long term commitments, which will tie into all congregational activities (i.e. Shabbat School, Adult Education, High Holiday themes).

Because Tikkun Olam is such a highly prized congregational value, and because, based on prior experience, service offers a wonderful avenue to connection, we should establish the expectation that every member will participate in Tikkun Olam in some form.

## Havurah Shalom Hazon: Long Range Plan – 2014 to 2019

As with other committees, clear guidelines for how the Tikkun Olam committee chooses to sponsor a cause or an organization need to be communicated to the community.

### **Implications of Tikkun Olam Findings**

#### **For the Rabbi**

Our rabbi needs to have a strong social justice perspective and be active in local and national organizations and, simultaneously, in a collaborative relationship with the Havurah social action aims. We want our rabbi to engage the community in a respectful and sensitive manner in issues concerning Israel. The rabbi needs to recognize that there isn't agreement within the Havurah community concerning Israel.

#### **For the Staff**

Additional staff time is required to at least initially implement a structure for cohorts of all ages to participate in direct action activities.

#### **For Space**

Members would like to see the Beit Knesset used more of the time. Making our space available to other groups who might benefit when we are not using it could be a form of Tikkun Olam or improve our own financial sustainability

#### **For Funding**

New efforts to provide direct action opportunities should be combined with a review of how funding for Tikkun Olam is projected.

Havurah-supported Tikkun Olam fundraising should be coordinated in the context of overall Havurah fundraising activities.

#### **For our Governance Structure**

Havurah lay leaders should be visibly involved in Tikkun Olam to encourage member participation.

A stronger connection needs to be made between the congregation and Tikkun Olam activities. Participation might be increased by continuous communication about the way members can propose and receive funding for Tikkun Olam projects, or by creating an institutionalized, yearly Tikkun Olam theme which is chosen by the congregation at large and which suffuses all areas of activity.

### **Tikkun Olam Vision and Strategies**

*Havurah Shalom members are engaged in dynamic social action that allows us to live out our values of Tikkun Olam (repairing the world). Tikkun Olam infuses all that we do.*

## Havurah Shalom Hazon: Long Range Plan – 2014 to 2019

### Strategies:

- Develop additional direct action programming to address immediate needs of people in the local community
  - Recommended Action: Provide intergenerational interactions through Tikkun Olam activities
  - Consider creating a method to allow congregational input into a Tikkun Olam theme for each year, with awareness of continuity and long term commitments, which will tie into all congregational activities (i.e. Shabbat School, Adult Education, High Holiday themes)
- Commit B'nai Mitzvah kids to service during the year before and after their Bar or Bat Mitzvah
- Continue advocacy work that addresses root causes of social injustice

### **Findings: Hadracha (Leadership and Governance)**

#### ***Today***

Havurah Shalom is governed by a set of by-laws and is overseen by an elected board called the Steering Committee. The officers of the organization comprise the Executive Committee, and the remainder of Steering is composed of at large members. Steering members serve 2 year terms, on a staggered basis. Succession is provided for in the movement of First Vice President to Junior Co-President to Senior Co-President to Immediate Past President. A vibrant committee structure consists of appointed Committee Chairs for Finance, Nominating and other standing and Ad Hoc committees as established by the Steering Committee.

Currently we have these Committees:

- B'nai Mitzvah
- Building
- Cemetery
- Design
- Finance
- Fundraising
- Gardening
- High Holiday Logistics
- High School
- History
- Information Technology
- Library
- Life Long Learning
- Membership
- Middle School
- Moatzah (Educator Liaison)
- Music
- Rabbi Liaison
- Shabbat School
- Spiritual Life
- Tikkun Olam
-

## Havurah Shalom Hazon: Long Range Plan – 2014 to 2019

Our interviews with leaders revealed that we tend to burn out volunteers as we put one person in charge of an important area of the organization and leave that person in place for too long without adequate support.

Staff and lay leadership are working collaboratively.

We have trouble understanding that leadership requires decision-making, and our leaders don't always know what decision-making authority they have.

Taking on leadership roles appears daunting and makes attracting new leadership difficult. We need to mentor new people to lead.

Certain areas of governance are not transparent, i.e. the roles of Steering, Exec, Rabbi Liaison Committee.

### ***Tomorrow***

Communication between committees, lay leadership, and the congregation as a whole needs to be improved. Committee planning, prioritization, budgeting, and decision making processes that commit Havurah resources need to be clear to the entire community.

We need to determine what the Rabbi Liaison Committee's involvement will be in the rabbi transition process.

### **Implications of Hadracha Findings**

#### **For the Rabbi**

The Havurah community wants the rabbi to work collaboratively with lay leadership as well as provide guidance for the lay leaders.

#### **For the Staff**

Maintain and increase collaboration between staff and lay leadership, with regular conversation about on-going priorities for each groups' work.

#### **For Funding**

Any external consultation on governance will need specifically designated funding.

#### **For our Governance Structure**

We need to review the number of people on Steering, the length of time of service, the distinct responsibilities of Exec and Steering, a formalized on-boarding process for new Steering members, and a formalized Dorot (generational connections) process to bring people into leadership

We need to increase the congregation's awareness of roles of Steering, Exec and Rabbi Liaison Committee.

## **Hadracha Vision and Strategies**

*Havurah Shalom is a respectful, cooperative partnership between clergy, staff, and members. Members of Havurah Shalom govern the organization through membership on Steering and other committees, and take personal responsibility for offering their time, talent, and resources to contribute to the strength of the whole.*

### Strategies:

- Ensure that there is adequate space and operational capacity to meet current needs and potential growth
- Create a Havurah values-based program for financial giving to lessen dues dependency, to increase Havurah's sustainability, and to implement Long Range Plan strategies
  - Recommended Action: Attend to the community's transition from a non-fundraising culture
- Build an endowment and legacy giving program
- Reinvigorate the participatory roots of Havurah
- Ensure a well-defined committee structure
  - Recommended Action: Clarify and define the boundaries of committee priority setting, decision making and budgetary authority.
  - Recommended Action: Convene governance task force to review the number of people on Steering, the length of time of service, and the distinct responsibilities of Exec and Steering.
- Strengthen leadership development throughout the organization
  - Recommended Action: Convene governance task forces to develop a formalized on-boarding process for new Steering members, and formalized leadership training for identified cohorts, for both the Steering and committee levels.
  - Recommended Action: Actively encourage committee members to become involved in leadership roles on their committees as well as rotation of leadership within committees.
  - Recommended Action: Consider hiring a consultant to advise Steering/Exec on transparency as well as board leadership and development
- Improve communication between committees and the congregation
  - Recommended Action: Committees should use Hakol and the community email to communicate to the congregation about any activities being sponsored or funded with congregation resources.
- Foster fruitful partnerships and connections with other organizations
  - Recommended Action: Conduct a 360 degree evaluation process of Havurah from perspective of the greater Portland Jewish community and other institutions we interact with (such as churches, non-profits, etc.).