

Knowledge Network Curated Content

WHERE ARE WE, AND WHERE DO WE WANT TO BE?

Rabbi Abraham Joshua Heschel said, “Human action is not the beginning. At the beginning is God’s eternal expectation. In every act we either answer or defy, we either return or move away, we either fulfill or miss the goal” (*God in Search of Man*). This sentiment, the idea of living up to expectations, of making sure each step is a firm step toward achieving an objective, is integral to successful strategic planning.

Indeed, successful strategic planning must begin with bringing into focus your congregation’s identity and setting clear objectives regarding its future. Questions like, “What kind of community do we want our congregation to be?” and “How is the mission/vision reflected in the congregation’s governance structure?” are helpful to keep in mind throughout the process; consider using the following steps to guide you through the process:

- Examine the congregation’s current goals, strengths and opportunities for growth, vision and mission.
- Determine what congregant’s want/need/expect from the congregation.
- Create/increase the sense of ownership of the congregation by the congregants.
- Identify ways to make the congregation a significant part of congregants’ lives, even when they don’t perceive the need.
- Recognize that there are many congregations within your congregation, and develop ways to serve the various factions.
- Review staffing and governance patterns to determine if current patterns/practices are helping to achieve congregational goals.
- Examine ways to increase the involvement/commitment/connection of members.
- Explore ways to maximize the significant human and financial resources that are part of your congregation.
- Review methods and content of communication from the leadership to the congregation, from leader to leader and from congregants to leaders.
- Explore ways to maximize the strengths and skills of staff, volunteer leaders and members—and to codify their work as partners in a *brit* (covenantal relationship)—in order to build and strengthen the congregation and prepare it to move forward.

Visioning

The synagogue is an interconnected system in which each part of the system can affect every other part, and the congregation is maintained by a sense of balance. During the strategic planning process, diagnostic questions like, “What needs to be changed and why?” are asked, which can sometimes cause the balance to teeter on the fulcrum. This is why creating and communicating a vision is vital. The vision helps explain the implications of the proposed changes, as well as the implications of remaining static.

Congregations typically need to pursue and achieve more than one kind of growth in order to sustain congregational health. Growth types can include numerical, maturational, organic and representational. By maximizing the strength and skills of clergy, staff, volunteer leaders and congregants, congregations can develop a mutually agreed upon vision and set of objectives that will move the congregation in a common direction.

Consider the following questions as you, personally, prepare to help shape the congregation’s vision:

- What values are true priorities for our congregation?
- What do our members and the larger community need that our congregation can and should provide?



- What do I really want our congregation to accomplish so that I will be committed, aligned and proud of my association with our congregation?
- What is my personal vision of our congregation in the coming year?
- What would make me personally commit my mind and heart to this vision over the next five years?

Consider the following questions as you and the leadership team prepare to shape the congregation's vision:

- What special services/programs do we provide to respond to members' needs?
- What services/programs do our member need that we do not provide?
- Do we have an obligation to meet other needs?
- What do we do best?
- What should we stop doing in order to better meet members' needs?
- What needs of our congregants are changing?
 - Will our members be different in five years? In ten years?
 - How will they be different?
 - What will we need to do differently?
- How do we want to be perceived by our Jewish community? By the community at large? What role do we want to play in each of the communities in which we belong?

Brainstorming

One useful visioning technique is brainstorming, a positive, interactive group process whereby individuals contribute their own uncensored creative ideas and build upon others'. It's essentially the business world's version of the improv credo, "Yes, and..." You go with the premise and add to it; no idea is a bad idea.

Brainstorming is most commonly used when you're seeking a multitude of ideas or want elicit a diverse range of perspectives. It helps in the identification of problem areas and suggestions for solutions. Some facilitator tips and rules follow:

- Gather all relevant people
- State the issue/problem/topic clearly
- Explain that there is no criticism of the ideas and no discussion of the ideas—just state the ideas
- All participants will have the opportunity to express their thoughts fully, and no one is excluded
- Allow participants a few minutes to jot down their ideas
- Select structured or unstructured brainstorming:
 - Structured: In a pre-determined order (clockwise from the facilitator; alphabetically; something else), each person states one idea per round; continue until all participants have had a chance to state all their ideas. If a person does not have an idea (this is likely in later rounds), s/he can simply say, "Pass."
 - Unstructured: Participants flexibly and randomly call out their ideas as quickly as they can be captured by the designated scribe. This creates a relaxed atmosphere and is more conducive to a greater flow of ideas.
- Remember the ground rules:
 - Every idea is expressed exactly as the participant wishes, without interruption or judgment
 - All ideas are displayed where all team members can see and build on them
 - Brainstorming sessions should move quickly within a prescribed time frame
 - Follow-up, in-depth discussions of ideas is mandatory



Trends

Fashion experts might tell you to ignore trends and stick to the classic wardrobe staples that work for you, but congregational leaders would be remiss if they didn't recognize current trends and make educated guesses about future ones. Such "trend forecasting" is an essential part of the strategic planning process. In the areas of membership, finance and staff, consider the following questions:

Membership Growth/Loss over the Last Five Years

1. If there is a trend toward growth in membership, to what do you attribute such growth?
 - a. Do you believe that this growth will continue?
 - b. What does such growth imply for your congregation's future?
2. If there is a trend showing decreasing membership, to what do you attribute such a decrease?
 - a. Do you believe this decline in membership will continue?
 - b. What does such attrition imply for your congregation's future?
3. Is your congregation losing more members and/or bringing in fewer new members annually than it has historically?
4. Do you conduct exit interviews of members when they leave the congregation?
5. What percent of prospective members join your congregation?
6. How can you create a place of community and grow a commitment from existing members?
7. How might you reach out to members to understand their needs?
8. Have you reached out to both active members and those members who may be less involved in the congregation?

Finance: Revenue and Expense Trends over the Last Five Years

1. What is the source of the majority of your revenue?
2. What are additional fundraising options?
3. Does your congregation have a plan for seeking outside rentals of your facility?
4. How do you tie revenue/expense discussions to the mission and vision of the synagogue?
 - a. How do you communicate mission and vision to the Finance or Budget Committee?
 - b. How do you communicate mission and vision to members?

Senior Staffing Models

1. What is your ideal staff make up?
2. Does the current staffing model meet the needs of the congregation?
3. How would changes to the current staffing model affect the congregation?
4. Do you anticipate an increase in the number of staff at your congregation?
5. Have you begun the process of defining what these new staff members will do and the impact they will have on existing staff?
6. If you increase staff, what new positions would be most beneficial to the congregation?
7. What would be the effect of a decrease in staff?
 - a. How would this change the existing staff's responsibilities?
 - b. How would it change the culture of the synagogue?
 - c. How would it affect the mission, vision and goals of the congregation?



Ethical Wills

An ethical will is similar to a traditional will except that rather than leaving possessions to future generations, you reflect upon about what values, life lessons and guidance you want to bequeath. Writing an ethical will as part of the strategic planning process can help you define your congregation's identity and determine what you want it to be.

The following steps and questions will prompt you to think about what is truly important to your congregation's identity:

1. Spend 15-20 minutes discussing the following questions:
 - a. What are the core values and ethics that guide the functioning and direction of the congregation?
 - b. What values do you want represented in the *brit* between leaders/staff/clergy and the congregation?
 - c. What is the organizational legacy the congregation has inherited?
 - d. What might future leaders want to inherit? What would they want to learn?
2. Write your group's ethical will, beginning with the following statement: "We, the leadership of Congregation X, do will and bequeath the following values, ethical guidelines and organizational legacy to future leadership of our organization, in hopes they will preserve and expand this legacy."

(These steps have been adapted from Bernard Reisman's The Jewish Experiential Book.)

Ten Commandments for Successful Strategic Planning

1. Gather a diverse and representational committee
2. Use URJ resources and staff
3. Define goals of strategic planning process
4. Review current mission, vision and strategic plan
5. Involve the whole congregation and elicit feedback
6. Identify congregational strengths and weaknesses
7. Consider finances and future budget demands
8. Set goals, priorities and implementation plan
9. Communicate process and progress with congregation and make strategic planning conversation a habit
10. Evaluate process, make suggestions and start again

Strategic Plans in Action: Congregational Examples

Small Congregations (up to 200 households)

- [Beth Shalom](#) (Bozeman, MT)

Medium Congregations (201-600 households)

- [Congregation Micah](#) (Nashville, TN)
- [Temple Am Echad](#) (Lynbrook, NY)

Medium-Large Congregations (601-1,000 households)

- [Rodef Shalom Congregation](#) (Pittsburgh, PA)
- [Temple Beth Shalom](#) (Needham, MA)



- Temple Beth-El (Providence, RI)
- Temple Israel (Westport, CT)

Large Congregations (more than 1,000 households)

- Central Synagogue (New York, NY)
- Congregation Shaare Emeth (St. Louis, MO)
- Temple De Hirsch Sinai (Seattle, WA) [note: if the link does not work, please copy and paste this URL into your browser: <http://www.tdhs-nw.org/index.php/about-us/overview/strategic-plan>]
- Temple Israel (Minneapolis, MN)

Strategic Planning Resources (find more in the “Files” section of the Strategic Planning group)

- *Cultivating the Future: Long-Range Planning for Congregations*
- “8 Principles that Drive Strong Congregations,” by Amy Asin, URJ VP for Strengthening Congregations
- Strategic Planning Webinar: “Solutions for Today, Goals for Tomorrow”
 - Recorded webinar
 - Question & answer log and PowerPoint presentation
- Long-Range Planning: Hints and Tips
- Communicating Change during the Strategic Planning Process
- Strategic Planning Template
- Surveys
 - Moving from “Good Enough” to “Good is Not Enough”: Congregational Self-Assessment
 - Board Training Questionnaire
 - Long-Range Planning Survey, created and shared by Temple Emanuel (Kensington, MD)
 - Congregational Survey, created and shared by Temple Beth Israel (Longboat Key, FL)
 - Congregational Self-Assessment, from the Unitarian Universalist Association of Congregations
- “Café Shalom,” a program proposal that grew from successful strategic planning; created and shared by Temple Emanuel (Greensboro, NC)
- “Using New Measures to Change the Conversation about Success (and Your Congregation),” by Amy Asin for the *NATA Journal*, Winter 2014 (see pages 4-7)
- “Building Jewish Community with Intentionality,” by Rabbi Rachel Nussbaum for the *Journal of Jewish Communal Service*, Winter/Spring 2011
- How to Write a Strategic Plan, from On Strategy
- How to Start Strategic Planning, from Management Help

