

SYNAGOGUE LEADERSHIP INITIATIVE
Imagining Tomorrow's Synagogues Today

STRATEGIC PLANNING MANUAL



UJA FEDERATION OF
NORTHERN NEW JERSEY

111 Kinderkamack Road, River Edge, NJ 07661
201-488-6800 ext.278
www.ujannj.org
naomig@ujannj.org



Strategic planning is a process whereby congregational leaders create a comprehensive plan that envisions a three to five year future.



A strategic plan is an invitation to engage the congregation.



Strategic planning for synagogues is an example of emulating the Divine creative model.

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WHAT IS THE SYNAGOGUE LEADERSHIP INITIATIVE?

The Synagogue Leadership Initiative (SLI) believes synagogues are central to the Jewish journeys of individuals and families.

Partnering with local congregations, SLI works to make synagogue life more attractive and inspiring to the Jewish community in northern New Jersey. SLI is dedicated to imagining the best that synagogues can be and then translating that dream into reality. This ongoing partnership provides the programs and strategies to address the complexities confronting synagogues in the 21st century.

SLI programs are dynamic and customized to meet the challenges of synagogues in the northern New Jersey community. The goals of SLI are to:

1. help grow synagogues that are relevant and vibrant and enable them to reach their fullest potential
2. develop synagogue leadership that is Jewishly knowledgeable and aware of the best practices of synagogue management
3. build community on the intra and inter-synagogue level
4. generate a force field of Jewish life in Bergen County which will positively affect the lives of affiliated and un-affiliated Jews alike

As a department of the UJA Federation of Northern New Jersey (UJA NNJ), SLI is able to connect synagogues to the beneficiary agencies and programs of the Federation thereby deepening connections with Jewish life through family and individual services, as well as educational, cultural, recreational and social action activities.

SLI Offers:

AFFINITY GROUPS

SLI convenes groups of synagogue leaders to discuss issues of mutual concern. Networking and learning opportunities are held for synagogue presidents, rabbis, cantors, executive directors, sisterhood presidents, membership chairs, social action chairs, and more.

CAPACITY-BUILDING WORKSHOPS

SLI offers hands-on learning laboratories for synagogue leaders to aid them in their work. The workshops give leaders an opportunity to develop and share important skills on synagogue management, governance and leadership development.

SHULBIZ NEWSLETTER

SLI's newsletter for synagogue leaders is published several times annually and focuses on practical concepts and suggestions for enhancing synagogue governance, programming, and fundraising.

STRATEGIC PLANNING

The most intensive of SLI programming, strategic planning is a process undertaken by two synagogues for a two-year period of time. SLI professionals work with teams of synagogue leaders to write a 3-5 year plan that envisions a future for the synagogue. SLI then works with the congregations to implement their plans.

SYNAGOGUE CONSULTATION

At the request of individual synagogues, SLI staff meets with the leaders of that congregation to explore and help resolve issues and challenges specific to its membership.

DEFINITION OF STRATEGIC PLANNING

WHAT IT IS

- Strategic planning is a process whereby congregational leaders create a **comprehensive plan** that envisions a three to five year future.
- Strategic planning is done with the intent of **developing a team of leaders** who can engage in rigorous issues clarification on behalf of the congregation and who can develop a common voice articulating the future for the congregation.
- The intent of the strategic plan is to make a **dramatic, transforming change in the life of a congregation**. Each strategic plan includes several major change recommendations that together will create a different life within the synagogue and will challenge the synagogue in new ways.
- A strategic plan is **contextually authentic** to a specific congregation.
- A strategic plan is an invitation to engage the congregation in a process of self definition and direction.
- A key element in strategic planning is **energizing leaders** to implement the plan rather than developing such an aggressive plan that leaders are immobilized.
- The intent of a strategic plan is to include a realistic baseline of information about synagogue life, as it exists. Each strategic plan includes at least sixteen components. (See Strategic Planning Checklist on page 19).

WHAT IT ISN'T

- Strategic planning is not a short-term intervention to fix problems that are more in need of a mediator rather than a planning consultant.
- Strategic planning is not a plan in which every goal and action item can be implemented tomorrow.
- Strategic planning is not a plan in which the leaders can work out major problems with their rabbi, cantor and staff.
- Strategic planning is not focused on daily, operational issues.

STRATEGIC PLANNING: A JEWISH PERSPECTIVE

The Jewish community has been given the task by G-d to actively participate in making the world a better place. This imperative to plan, evaluate, re-create and ultimately perfect, emanates from the belief that human beings are created in the image of G-d (Gen. 9:6). In the dramatic story of the Creation the Almighty creates, assesses and sees that the outcome “was good.” G-d then works daily to refine and perfect that creation. It states in the daily morning service “in G-d’s goodness, G-d renews daily, perpetually, the work of creation.” The challenge then for us, in realizing our Divine image, is to also create, assess and perfect in order to better our world, our community, and our own lives.

The ultimate strategic plan for Jewish life is the Torah itself. This blueprint for meaningful, purposeful living sets before us both the vision for the world as well as the goals and action steps for achieving this vision. The Torah also represents the partnership between man and the Divine in an ongoing assessment of specified objectives. In the oral Torah, humanity is empowered to further the goals laid out in the written Torah and works with the Divine partner to actualize the Plan.

“The tyrant Rufus asked Rabbi Akiva: Whose works are more beautiful – those of the Holy One or those of flesh and blood? Rabbi Akiva answered: those of flesh and blood are more beautiful...”

Rabbi Akiva brought Rufus ears of grain and delicate breads, saying, ‘The ears of grain are the work of the Holy One, the breads the work of flesh and blood – are not the loaves of bread more beautiful?’ Then Rabbi Akiva brought him flax stalks and garments made in Beth-shean, saying, ‘The first are the work of G-d; the second, the work of man. Are not the garments more to be admired?’” (Midrash Tanhuma, Tazria)

This passage illustrates the mandate given to man to continue to create and perfect G-d’s creation. Strategic planning for synagogues is another example of emulating the Divine creative model. The process enables congregational leaders to build consensus about the planned future for their synagogue. They create a vision and the action steps that need to be taken to realize that vision.

The SLI Strategic Planning process allows your team to engage in an endeavor that utilizes the best of modern planning techniques within the context of a spiritual Jewish framework. The process of working to set and implement an agenda for the future of a congregation is an ennobling endeavor that strengthens relationships while it fulfills the mandate for our creative participation in this world.

YEAR 1 – STRATEGIC PLANNING TEAM

I. PROCESS USED

The Strategic Planning Team of a congregation writes the Strategic Plan. The role of the SLI planning consultant and planning professional is to facilitate and support the creation of the written plan in Year I. **The SLI consultant facilitates each meeting of the strategic planning team.** Listed below are phases of the planning journey.

II. STORYBOARD METHODOLOGY

Through the use of storyboards (large 4x4 boards placed on easels) and various color cards, the SLI consultant is enabled to focus the thinking of the planning committee and to capture verbatim the comments of committee members. At the inception of each meeting cards are pinned to storyboards, both to outline the evening's agenda and to also provide opportunities for committee members to write their revisions of draft materials that have been prepared in advance. The draft materials are essential to moving the work of the committee forward at each meeting.

Upon conclusion of each meeting, minutes are generated from the cards and are circulated to all members of the strategic planning team within 24 hours. The work teams then use the minutes to prepare draft materials for consideration at the next meeting. Inherent to the use of the storyboard methodology is a flexibility to respond to the planning needs of each congregation.

Each strategic plan is tailored to the context of the individual congregation. No two plans will look exactly the same even though certain elements will be common.

III. READINESS AND AGREEMENTS FOR STRATEGIC PLANNING

Once accepted as an SLI Strategic Planning congregation, here's what you should either have in place or agree to before you begin the Strategic Planning experience:

GET READY

1. **Meeting with SLI professionals** to discuss participation in Strategic Planning. This will include at least one initial meeting with the rabbi, the president and the Planning chair/co-chairs. Any "old" issues confronting the congregation should be discussed at this time. Other issues to be discussed include:
 - a. Do you have a mission statement and a vision statement? Is the congregation satisfied with the mission and vision? Please furnish us with a copy of the mission statement and the vision statement.
 - b. Why do you want to engage in strategic planning as a congregation? Have you done such a plan in the past? When was the plan created and what was the result of the plan?
 - c. What is the most recent change in this congregation? When did the change occur? Who initiated, what is the result and what was the experience of the change? Are there any plans yet to be implemented?
 - d. What is the accountability, means of evaluation and follow through for this congregation?
 - e. Describe the future you desire. Be as specific as you can.
2. Complete the **SLI Strategic Planning application** with a leadership group from your congregation. This will include individual conversations between congregational professionals and lay leaders and the SLI Strategic Planning Coordinator. After filling out the application you may also be contacted by the Strategic Planning Coordinator for an in-person meeting. **The application asks that you include a Board resolution** endorsing the congregation's participation in the strategic planning process..
3. **Rabbinic Leadership**
 - a. It is critical to have a rabbi who is agreeable to being a full participant in the planning process and will attend the executive sessions of the strategic planning team prior to each meeting
 - b. If you're in the middle of a rabbinic search...wait!
4. **Co-chairs** of the Strategic Planning Committee who will have time to devote to this effort which includes monthly meetings and follow up in between the meetings with those responsible for preparing materials.
5. **A Planning Committee** of approximately 25 (20 at minimum) people representing a cross-section of your congregation. Committee members should

reflect the composition of your synagogue in terms of age, gender, length of membership, professions, skills, congregational participation. Look for individuals who are not active in the congregation as well as those who are heavily involved.

ONCE YOU ARE SELECTED:

6. **Readiness Plan & Information Gathering.** This work is to be done ahead of the strategic planning process and when applicable distributed to all team members in advance of the first meeting.
 - a. **Local demographics**
 - b. **Environmental scan**
 - c. **Congregational membership data**
 - d. **Congregational financial information**
 - e. **Best practices search**-with the help of SLI professionals your congregation will begin researching and visiting when possible best practice models from congregations both locally and nationally
 - f. **Participation in a team assessment event**
 - g. **A Needs Assessment** – A needs assessment is a way of polling the congregation to find out what the concerns and needs are of its existing and potential membership. This can be achieved through a survey and should be completed in the initial stages of the strategic planning process so that baseline information is available as the planning process moves forward.

AGREEMENTS

1. **Participation in other SLI programs** – they provide great hands-on ideas for your congregation
2. **To Provide monthly written updates** to the congregation, the Board, SLI and the Taub Foundation during the planning and implementation phases.
3. **To take the plan to the Board and to the congregation** for input, approval and implementation at the end of the planning period.
4. **To share the completed plan** with other congregations and to post the completed plan in some format on the synagogue's website
5. **To select the Transition/Implementation Team** to begin the implementation process immediately upon Board approval of plan

IV. RESPONSIBILITIES OF STRATEGIC PLANNING TEAM MEMBERS

2 Co-Chairs	The co-chairs are responsible for chairing the team and supporting the work of the smaller work teams.
Professional Staff/Clergy	The professional staff and clergy are encouraged to participate in this important endeavor to provide critical leadership.
President	The president is always encouraged to participate in this important endeavor to provide critical leadership.
Incoming President	The incoming president should participate in the planning process since the congregation will be in the implementation phase during their presidency.
Steering Committee	2-3 people (rabbi, president and executive director) work with the chair to plan meetings and brainstorm solutions to issues as they arise. This can also be done by the president and rabbi along with the chair(s).
Communications person(s)	This person/people prepares written monthly updates to keep congregation informed of the progress of developing the Strategic Plan.
Webmaster	This person sets up a Yahoo Group to facilitate quick and easy communication among team members. This is to be used to post team reports and minutes rather than as a chat group. Reports and minutes should be posted on the congregational website regularly
Minute taker(s)	This person prepares accurate, timely minutes to be sent to the team's Yahoo Group within 24 hours of the meeting. This is done on a laptop at the meeting. This person is selected prior to the first meeting. Minutes reflect the work done at the meeting. The small work teams use this information to prepare their drafts for the next month.
Small work teams	These are sub-groups of the full team. They prepare drafts of material prior to each monthly meeting. These groups may change during the course of

developing the plan and recombine depending on the needs of the planning team.

Chairs of small work teams

A person for each work team who is in charge of making sure the team completes its work.

Organizer

This person prepares an electronic draft of the strategic plan by compiling the reports of the work teams, as they are completed, into a single document.

Preparation of Gorilla chart

Toward the end of the writing of the plan, a person is in charge of drafting a chart that will include components of the plan already appearing in narrative form. This will be used during the implementation phase in year 2.

V. RESPONSIBILITIES OF THE CO-CHAIRS

Development and maintenance of team composition – The co-chairs are responsible for choosing the team members, adding new ones where appropriate and orienting the new team members as to what has occurred so far in the process. This includes updating team lists when appropriate.

Prompting – Encouraging the teams to read the minutes and then to use them in the next drafts, so that there is some integration of the suggestions made from the whole team. Checking in with team members and asking for updates on their progress with their assignments. Ensuring that drafts are ready and sent out prior to each monthly meeting.

Supporting – encouraging team members with their assignments as well as hearing any concerns or issues that arise. As a set of co-chairs said: “Be cheerleaders.”

Clarifying – This is to clarify anything that isn’t clear to team members. The SLI Consultant and Professional are available to the co-chairs if they need further clarity in order to communicate effectively to the team.

Resourcing – providing further resources to aid the effectiveness of the team. This would be done in consultation with the SLI consultants.

Follow up – ensuring that logistics are ready for each meeting (room, refreshments, attendance) and that all materials are submitted to the group prior to the meeting. This includes setting a deadline each month by when drafts are to be submitted to the full team. This also includes following up with individual team members’ questions.

Listening - This involves keeping ears open to issues emerging from the team that would need to be detangled so that work teams can complete their work. This is critical to the development of the team and would be important to communicate to the SLI consultants either prior to a meeting or at the pre-meeting so that in-course corrections or tweaking the process can occur.

VI. ORIENTATION OF THE PLANNING TEAM

1. *The beginning*

SLI will provide an orientation for the Strategic Planning Team during the months preceding the start of the planning process. The 2-hour orientation is conducted by the Strategic Planning professional and is an opportunity for the team to become acquainted with the process through the use of this manual.

2. *What is expected of this team*

The team is expected to meet on a monthly basis for two hours and to accomplish agreed upon tasks in the time between the monthly meetings.

The team is also expected to communicate about its work to the congregation on a regular basis. The chair/s of the team meet with the SLI consultant and professional prior to each meeting to plan for future meetings.

3. *What will SLI provide*

SLI consultant and professionals work with team leadership to plan monthly meetings, assign tasks and assist in the collection of draft materials for each meeting. Monthly agendas are drafted by the SLI consultant. Support is given to the team chair(s) prior to and in between the monthly meetings. The SLI consultant facilitates each meeting using the Storyboard Methodology explained below. The intent of this methodology is to move the process forward with each meeting.

4. *The Checklist for Strategic Planning on page (Note to self: insert page once manual is revised)*

Although each Strategic Plan will be customized to the particular congregation, the Checklist details the common elements that are found in strategic plans. It also guides you should you wish to begin preparing some of the materials in order to get ready for the planning process.

VII. ORIENTATION OF THE CONGREGATION

1. Orientation and ongoing communication to the members of the congregation is important to the success of the strategic plan.
2. The strategic planning team selects an individual or two to prepare periodic written updates to the congregation so that members are informed as the plan unfolds (bulletin, email, letter, web-site, from the bimah and ongoing reports to the Board of Trustees).

VIII. TEAM SESSION – YEAR 1

1. *How Meetings Work*

Monthly Strategic Planning team sessions are 2 hours long and are preceded by a 30-45 minute executive committee meeting (chairs, rabbi, president, SLI consultant and professional) to address concerns and to project the planning for the coming sessions. The sessions are facilitated by the SLI consultant who prepares an agenda in advance. Issues dealt with are reflected in the Strategic Planning Checklist. Work teams complete tasks in between monthly sessions. The full team reviews the written drafts of the work teams at the monthly sessions. Suggestions are given by the full team to aide in the re-drafting process by the work teams.

Only written draft materials prepared in advance by the work teams are reviewed at monthly sessions.

2. *Minutes*

Critical to the success of the team's efforts are the accuracy of the written minutes. Prior to the first meeting, the team selects a computer literate individual who can record verbatim the information that will be written on cards and posted on boards during the meeting. Through the use of email, group minutes are circulated no longer than 24 hours following each meeting. Minutes must be used by the work team in preparing their drafts for the next meeting.

3. *Setting up a Yahoo Group*

A person on the team is designated to set up a Yahoo Group or other email list serve for the team to facilitate quick and easy communication. Draft materials are sent out to the whole team via the Yahoo Group prior to the meeting. Minutes are posted both on the Yahoo Group and on the congregation's website as well.

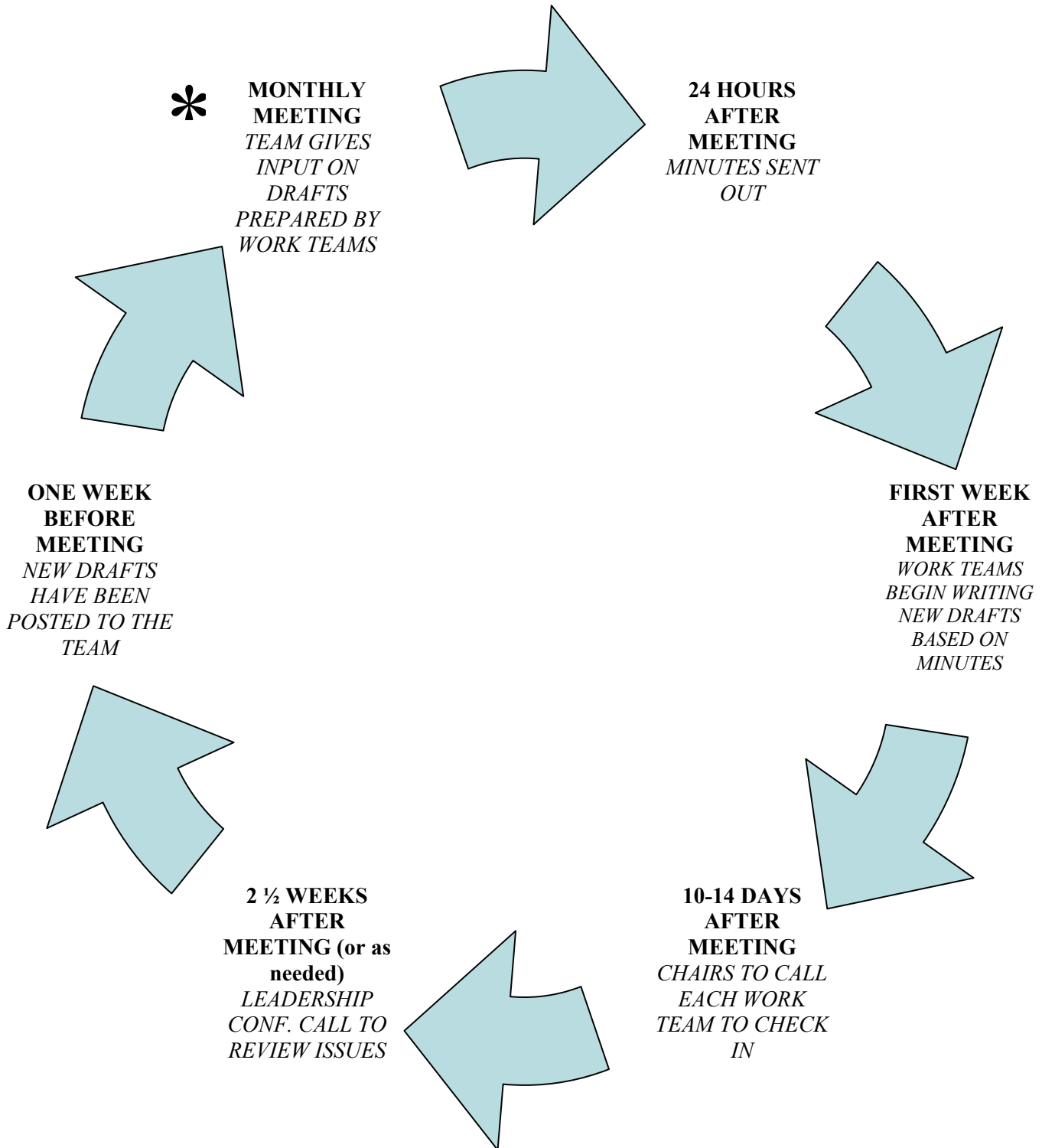
4. *Writing the plan*

The length of time to write the strategic plan depends on the ability of the planning team to accomplish its monthly tasks. There should be a recognition that congregational plans are written by volunteers who have many other time commitments. Therefore, to compare the length of the process to a corporate model will be inconsistent. Length of completing the writing component of the plan has ranged from 8-12 months.

5. *Input and Approval Process*

Each congregation designs a method for securing Board and congregational input to and eventually, approval of the plan. Board input and approval generally precedes congregational input and approval. A congregational meeting is held to discuss, perhaps add to, and then approve the plan. Final approval varies with each congregation. For some it is Board approval contingent upon congregational acceptance. For others, it is congregational approval and then a revised document that returns to the Board for final approval. Either way, the purpose of this process is to engage the Board and congregation in a discussion of the plan and to provide the opportunity for their comment on the plan.

IX. MOMENTUM FOR DRAFT PREPARATION



X. YEAR 1 – WHAT WILL BE IN YOUR STRATEGIC PLAN: A CHECKLIST

1. _____ Mission Statement
2. _____ Vision Statement
3. _____ Core Values
4. _____ Data that is baseline (including factual profile, needs assessment on internal and external environment)
5. _____ Critical Issues – these are the most critical areas to address for the future
6. _____ Best Practices research
7. _____ Goals (Recommendations) and action steps (complete what will be accomplished, who is accountable, deadlines (start and stop), costs and progress notes)
8. _____ Prioritizing the most critical issue and the impact it will have on the vision actualizing
9. _____ Communication plan to keep everyone aware and participating
10. _____ Organizational Chart (Existing and Proposed)
11. _____ Staffing Chart (Existing and Proposed)
12. _____ Budget (Existing and Proposed)
13. _____ Evaluation Recommendation - stating how the plan will be evaluated, by whom and when
14. _____ Future Recommendation – stating how and when and by whom the plan will be examined and updated
15. _____ Process for approval
16. _____ Transition and implementation Team – to take the plan and oversee the implementation.
17. _____ 800# Gorilla – a huge chart indicting all goals, actions, accountable bodies, deadlines, costs and progress notes. The chart is used in the transition and implementation of the plan and is critical in charting the progress of implementing the goals.

XI. FORMATTING A STRATEGIC PLAN

1. Number lines (In Word go to File, Page Setup, Layout, Line numbers) for easy collection of responses from congregation
2. Make sure any individual names of people who drafted critical issues are removed
3. Make sure any directions that teams inserted to themselves are removed
4. Put in page numbers
5. Uniform font and font size
6. Uniform headings for critical issues and for different sections
7. Uniform style within each critical issue:
 - a. e.g. Name of issue,
 - b. First Heading = Rationale
 - c. Second Heading = Goal 1, 2, etc.
 - d. Third Heading = Action Steps (listed and numbered under each goal)
 - e. Cost
8. Order of plan:
 - a. Title page with date of plan
 - b. Table of Contents
 - c. Introduction
 - d. Mission
 - e. Vision
 - f. Core Values
 - g. Critical Issues
 - h. Existing Org chart
 - i. Proposed Org chart with any necessary narrative
 - j. Existing staffing
 - k. Proposed Staffing
 - l. Existing Budget
 - m. Proposed Strategic Plan budget
 - n. Implementation-Transition Team Recommendation
9. Other information/appendices
10. Include somewhere: names of committee members, dates of strategic planning meetings

XII. Sample Agreement between SLI and congregation:

OUR AGREEMENT-YEAR ONE CONGREGATION & UJA SYNAGOGUE LEADERSHIP INITIATIVE

Hinei mah tov—Behold how good and how pleasant for people to dwell together in unity.
Psalm 133

Congregation's team will:

- Attend and fully participate in ten monthly two hour meetings.
- Accomplish agreed upon tasks in the time between the monthly meetings.
- Communicate about its work to the congregation on a regular basis.
- Have a monthly pre-meeting to include the co-chairs, Rabbi, Executive Director and President to meet with the SLI consultant and coordinator.
- Provide quarterly reports to SLI to share with the Taub Foundation.
- Select team members including lay leaders, clergy and staff to attend SLI affinity group meetings and capacity building workshops during the 2007-08 program year.

Synagogue Leadership Initiative (SLI) will:

- Engage the team in the strategic planning process to help you reach your highest potential.
- Orient the Strategic Planning Team preceding the start of the planning process.
- Plan monthly meetings, assign tasks and assist co-chairs in the collection of draft materials for each meeting.
- Support team chairs prior to and in between the monthly meetings.
- Facilitate each meeting using the Storyboard Methodology.
- Provide consultations and best practice support where necessary.

Synagogue Leadership Initiative
111 Kinderkamack Road, River Edge, New Jersey, 07661
201.488.6800 ext.278 naomig@ujannj.org

YEAR 2 - TRANSITION AND IMPLEMENTATION TEAM

The year 2 team is critical to the success of the plan that had been adopted by the congregation. The role of the year 2 team is essentially to see that the critical issues, their goals and action steps are acted upon. Through a process of partnership between the team, board members and committees, the work of the plan begins to make its way into the work of the congregation's committee and culture.

I. PROCESS USED

By the end of Year 1, a new Transition/Implementation Team is established with 1/3 representatives from the original Strategic Planning team and 2/3 new representatives from the congregation totaling approximately 15-20 people. New co-chairs lead the second year team. The rabbi and president are expected to serve on this team as well and are critical to the work of the team. The work of the Transition/Implementation Team is important to the strategic planning process. Without the prompting and follow through of this Team, the Strategic Plan runs the risk of remaining only a paper product and never coming alive to transform the congregation.

Following an orientation process using the Gorilla Chart that was established at the end of year 1, the Transition/Implementation Team meets on a monthly basis with the SLI consultant and professional, in order to track the implementation progress of the plan. Meetings are 2 hours long and focus on the progress updates for each goal as well as on issues emerging from those updates.

II. PURPOSE OF THE TRANSITION-IMPLEMENTATION TEAM

The purpose of the Transition-Implementation Team is to pay attention to the progress made on each strategic planning goal and its action steps. The T-I Team serves a positive, supportive role for the committees in the congregation that are implementing the plan. It reviews progress updates and helps to untangle any roadblocks that are delaying the implementation of the strategic plan. It is there to support, encourage, problem-solve and generally act as a resource to the implementing committees.

III. NUTS & BOLTS OF YEAR 2

Similar to the original Strategic Planning Team,

- The SLI consultant facilitates the monthly meetings (consultant)
- a team list with email addresses and phone numbers is established, (co-chairs)
- group email or list serve is set up, (co-chairs)
- minutes are taken on a laptop and sent out to the new team within 24 hours, (team members)
- a person is assigned the task of writing monthly updates to the congregation.(team members)

The T/I team uses A.V. equipment such as a VCR and an overhead projector with screen at some monthly meetings.

IV. ORIENTATION OF THE IMPLEMENTATION TEAM

SLI will provide an orientation for the Strategic Planning Team during the summer months immediately preceding the start of the implementation year. The 2-hour orientation is conducted by the Strategic Planning professional and is an opportunity for the team to become acquainted with the process through the use of this manual and by reviewing their approved strategic plan.

V. RESPONSIBILITIES OF TRANSITION/IMPLEMENTATION TEAM

Co-Chairs	2 people to be responsible for chairing the team
Professional Staff/Clergy	The professional staff and clergy are encouraged to participate in this important endeavor to provide critical leadership.
President	The president is encouraged to participate in this important endeavor to provide critical leadership.
Steering Committee	2-3 people work with the chairs to plan meetings and brainstorm solutions to issues as they arise. This can also be the 2 co-chairs along with the rabbi and the president.
Communications person(s)	This person/people prepares written monthly updates to keep congregation informed of the progress of developing the Strategic Plan.
Webmaster	This person sets up a Yahoo Group or other list serve to facilitate quick and easy communication among team members. This is to be used to post team reports and minutes rather than as a chat group.
Minute taker(s)	This person prepares accurate, timely minutes to be sent to the team within 24 hours of the meeting. This is done on a laptop at the meeting. This person is selected prior to the first meeting. Minutes will provide a listing of team assignments for the following month as well as a description of issues that require follow up.
Team pairs	Team members work in pairs to contact the chair of the implementing committee for a critical issue and prompt them to explain the progress made in implementing that issue.
Gorilla Updates	A team member works to update the gorilla chart prior to each monthly meeting by inserting the progress notes to each action step. The gorilla chart is then distributed to each team member during the monthly meeting.

VI. RESPONSIBILITIES OF THE CO-CHAIRS

Development and maintenance of team composition – The co-chairs are responsible for choosing the team members, adding new ones where appropriate and orienting the new team members as to what has occurred so far in the process. This includes updating team lists when appropriate.

Prompting – Encouraging the teams to read the minutes and then to use them to review assignments and follow up on issues that are open. Checking in with team members by phone and asking for updates on their progress with their assignments.

Supporting – encouraging team members with their assignments as well as hearing any concerns or issues that arise. As a set of co-chairs said: “Be cheerleaders.” Paying attention to the needs of the team as a whole.

Clarifying – This is to clarify anything that isn’t clear to team members. The SLI Consultant and Professional are available to the co-chairs if they need further clarity in order to communicate effectively to the team.

Resourcing – providing further resources to aid the effectiveness of the team. This would be done in consultation with the SLI consultants.

Follow up – ensuring that logistics are ready for each meeting (room, refreshments, attendance) and that all materials are submitted to the group prior to the meeting. This includes making sure a minute-taker is selected for each meeting, the gorilla chart has someone to update it and that a monthly communication goes out to the congregation. It also includes setting a deadline each month by when drafts are to be submitted to the full team. Finally, it involves following up with individual team members’ questions.

Listening - This involves keeping ears open to issues emerging from the team that would need to be detangled so that work teams can complete their work. This is critical to the development of the team and would be important to communicate to the SLI consultants either prior to a meeting or at the pre-meeting so that plans can be tweaked moving forward.

VII. WORK OF TRANSITION-IMPLEMENTATION TEAM MEMBERS

Team members work in pairs in order to contact the committee chairs in charge of implementing goals and action steps in the Strategic Plan. The role of each team pair is, on a monthly basis, to prompt the implementing committee chairs for information about the implementation progress of that critical issue. (See Prompting Process Described on page 26) Reports are made back to the T/I team using the gorilla chart.

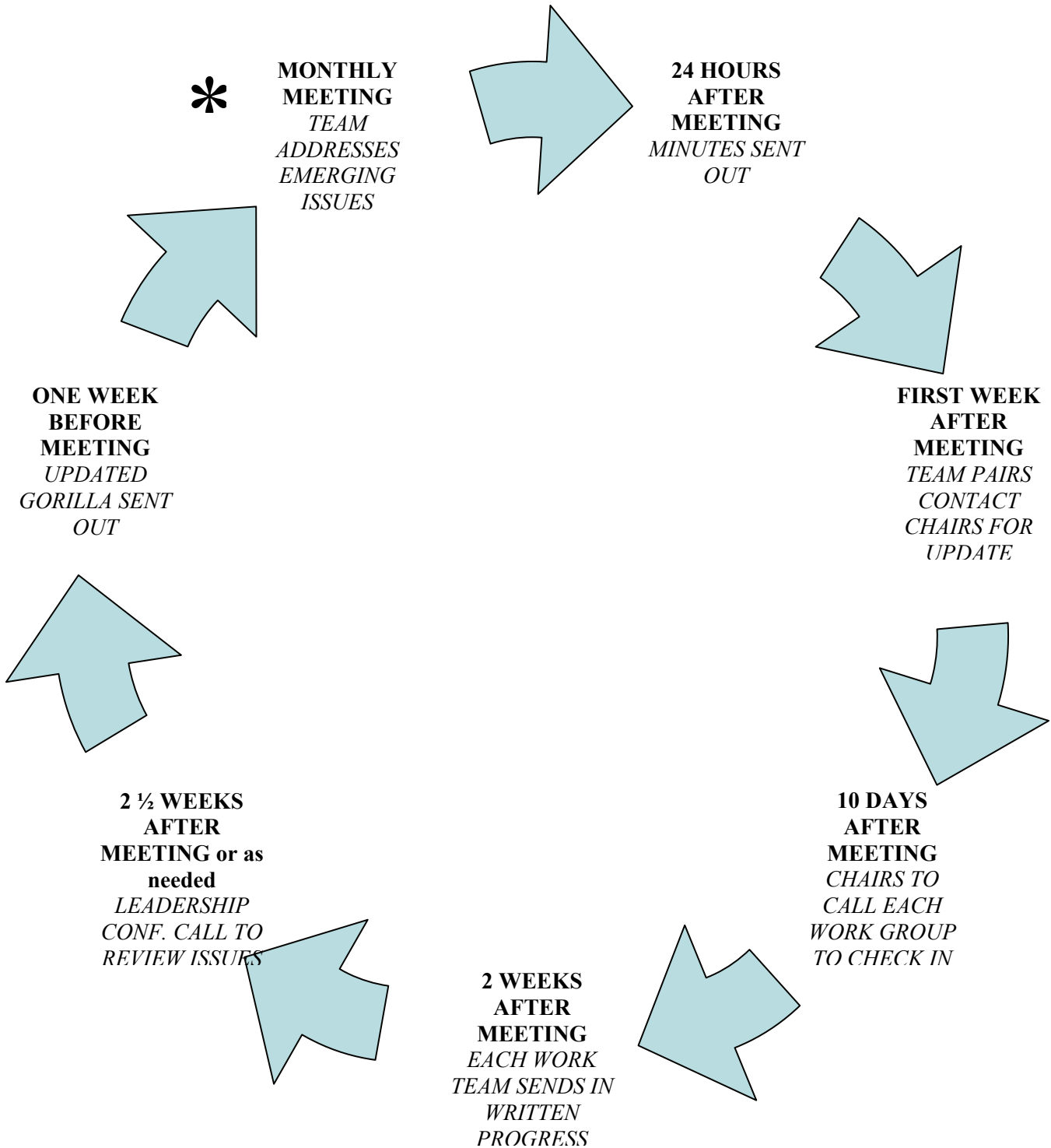
The T/I Team also establishes evaluation measures and reporting mechanisms to the congregation. Another person is selected to update the gorilla chart on a monthly basis. The mission and vision are included on the gorilla chart as are the names of the T/I members assigned to each critical issue and the responsible implementing committee chairs.

Monthly T/I Team sessions also include teachings on transition and change using the works of Nan Foltz, William Bridges and Alice Mann, from The Alban Institute. Additionally, the T/I Team will utilize change management techniques to resolve any roadblocks that arise in the implementation process.

VIII. PROMPTING PROCESS DESCRIBED

- a. Chair(s) of Transition/Implementation Team contact Chairs of implementing committees to let them know Team members will be contacting them and to arrange a time to orient all chairs that the SLI team will be working with.
- b. Team members contact Chairs of implementing committees to which they are assigned
- c. Make sure implementing chairs have copy of plan and gorilla
- d. Team members request progress updates from chair on assigned action steps from plan
- e. Team members hear the update via phone or email
- f. Team members contribute as invited, generating ideas, paying attention to support chairs rather than take over their work
- g. Email/send the progress report back to the Team person who is updating the gorilla making sure that the correct goal/action step is identified. Longer reports may be sent out to the team with highlights to appear on gorilla.
- h. The updated gorilla is sent out to the full Team one week before the meeting so that there is time for the Team to read the updates and identify emerging issues for full Team discussion at the meeting.

IX. MOMENTUM FOR COLLECTING PROGRESS UPDATES



X. EXAMPLE OF PROGRESS UPDATE FORM

This may be used to provide goal progress updates to the person maintaining the gorilla. Any other form for updating is also acceptable.

IMPLEMENTATION TEAM-- Priority/Issue _____

Date of Update _____

Preparer of Update _____

UPDATE OF ACTION STEPS

1. Action Step _____ Stop Date _____

Status:

2. Action Step _____ Stop Date _____

Status:

3. Action Step _____ Stop Date _____

Status:

4. Action Step _____ Stop Date _____

Status:

Example

2. Identify all current fundraising programs and assess status of funds owed - September 2003

Status: Action Item Near Completion—Committee has identified most fundraising programs in place for current fiscal year (i.e. Kol Nidre Appeal, member targeting, etc); still in process of identifying status of all funds owed. Expected to be completed by end of October.

YEAR 3 – SUSTAINING PLAN

1. PROCESS USED

Synagogue Leadership Initiative is continually engaged in supporting strategic planning congregations to reach their highest potential.

At the end of Year 2, the Sustaining Plan is designed with SLI staff and synagogue leadership. They design a customized plan to continue the ongoing effective leadership exhibited in the development of the Strategic Plan and in the Transition/Implementation phase of the plan.

The Sustaining Plan supports, coaches, resources a congregation that has completed the development of a strategic plan and has entered into the transition and implementation process. The Sustaining Plan helps institutionalize new patterns of operation, new behaviors and new leadership styles that were modeled and developed during Year 1 and Year 2. We highly recommend that congregations take advantage of leadership development offerings that SLI can provide to the Board of Trustees and to the team.

SLI and synagogue leaders will come to a mutual agreement on the following to tailor Year 3 to your congregation's needs:

- Who will serve on the Year 3 Sustaining Team
- How often it will meet
- Regularity and form of progress updates
- How facilitation of Team meetings will occur

II. OBJECTIVES

FOR CONGREGATION

1. to support the congregational leaders in their efforts to effectively implement goals set out in the strategic plan which enhance the congregation
2. to examine the plan for emerging new issues and conflicts
3. to oversee and implement the matching grant

FOR SLI

1. to support, coach and interface SLI resources with rabbi and congregational leaders to identify and address new emerging issues
2. to support, coach and resource rabbi and congregation in the ongoing progress, reflection and evaluation of their strategic plan
3. to customize a sustaining process for each congregation

III. MATCHING GRANT

For each synagogue that has engaged in strategic planning, the Taub Foundation makes available a matching grant of up to \$10,000 to enable the congregation to implement a congregation changing initiative of its strategic plan. The Year 3 Sustaining Team has responsibility for conceiving of the concept for the grant, for completing the application and for then monitoring implementation of the grant. See grant application on next page.

IV. APPLICATION FOR STRATEGIC PLANNING IMPLEMENTATION MATCHING GRANT

Guidelines: Matching grants of up to \$10,000 will be given to implement new and innovative projects that reflect congregational priorities resulting from the Synagogue Leadership Initiative Strategic Planning process. All projects are subject to ongoing evaluation. Proposed projects should be designed to have major impact on the congregation and should emerge from the synagogue's strategic plan.

Applicants are encouraged to consult with SLI professionals before submitting a proposal. There is no specific deadline for submission of the proposal, however, congregations are encouraged to submit their application during Year 3 of the planning process.

All applications must include a congregation and board resolution accepting the strategic plan and the intention to implement the recommendations of the plan.

Name of synagogue: _____

Address: _____

Phone Number: _____

Fax Number: _____

E-Mail Address: _____

Name of Implementation (Year 3) Co-Chair: _____

Address: _____

Phone Number: _____

Fax Number: _____

E-Mail Address: _____

Name of Implementation (Year 3)Co-Chair: _____

Address: _____

Phone Number: _____

Fax Number: _____

E-Mail Address: _____

MATCHING GRANT APPLICATION PROPOSAL OUTLINE

Please respond to the following questions:

1. Specify the initiative(s) from the Strategic Plan that will be given the highest priority for implementation. Explain the rationale for this priority.

2. Describe the proposed project.

3. What are the goals and objectives of the proposed project? Give a timetable for its implementation.

4. Explain how you will evaluate the effectiveness of the project.

5. What is the source of the matching funds? (synagogue budget, identified donor, other grant funds, etc.)?

6. List the names, addresses, phone numbers, e-mail addresses of members of the project oversight committee.

7. Attach the proposed project budget with a justification of each item in the budget.

Return the completed application to Judy Beck at SLI – 111 Kinderkamack Road,
River Edge, NJ, 07661. You may send it by e-mail to Judy at Judyb@ujannj.org

FREQUENTLY ASKED QUESTIONS

1. What does SLI offer synagogues?

SLI offers: affinity groups for rabbis, presidents & vice presidents, executive directors, cantors, sisterhood presidents, membership chairs, social action chairs; strategic planning; affinity group and skill-building workshops in fundraising, membership development, programming; rabbinic learning sessions; an informative newsletter, ShulBiz; synagogue board orientations; individual consultations.

2. What will this cost our synagogue?

While there is no monetary cost to your congregation, there will be a tremendous investment of time, energy, creativity and thoughtfulness. Because of a generous grant from the Henry and Marilyn Taub Foundation, the monetary costs for the SLI planning consultant and planning professional are covered. This is a unique opportunity for synagogues to benefit from experienced professionals who invest significant effort in helping to ensure the completion and implementation of the strategic plan.

3. How many people do we need in order to be involved in strategic planning?

It is required that 25-30 people participate in the Strategic Planning team in Year 1 and another 15-20 people for a separate team in Year 2. These individuals should be representative of the congregation in terms of age, gender, length of time as members, levels of participation. Please be sure to include those on the periphery of the congregation.

4. What will the time commitment be?

It generally takes a congregation 10 months to complete the writing of a plan. During that time Strategic Planning team members are expected to attend monthly, 2-hour meetings and to take assignments to complete in between the monthly meetings.

The second phase of the process is the transition/implementation phase that takes place during the second year and is intended to begin implementation of the plan. During this time a new team is formed and is again expected to meet on a monthly basis to monitor and prompt implementation progress.

5. Should the rabbi be involved?

Yes! As the spiritual leader of the congregation, it is vital for the rabbi to participate in as many meetings as he/she is able. This promotes congruity in understanding and developing the mission and vision of the synagogue as well as the key issues that need to be addressed.

6. Should synagogue professionals be involved?

Yes! The professionals in your congregation play a critical role in the day to day experience of your member and potential members. We would encourage you to urge

your executive director, religious school director, nursery school director and others who you identify to participate in the meetings.

7. What does the SLI Strategic Planning consultant do?

The SLI consultant facilitates each meeting through the Storyboard Method. She meets with the planning chairs, president and rabbi prior to each meeting. She consults as well with the planning professional in between the monthly meetings offering experienced advice and insight into any issues that arise.

8. What does the SLI Strategic Planning professional do?

The SLI professional facilitates the preparation of draft materials and agendas by the planning team for each meeting. She works closely with the SLI consultant to insure a smooth process that moves the congregation forward with each meeting. She plays a supportive role for the Strategic Planning chair(s) of the congregation in order to achieve strong team leadership. She is the connecting point of the congregation to other programs of SLI.

9. When can we start?

Because the strategic plans require intensive work, SLI selects one or two congregations at a time to work with on a monthly basis. If your congregation has not yet been selected, there may be preparation you can do to get ready for the strategic planning process. Ask Naomi Gewirtz how you can begin. She can be reached at 201.488.6800 ext. 278 or by e-mail at naomig@ujannj.org.

RESOURCES

For completed strategic plans, visit the link below and scroll down
http://www.ujannj.org/content_display.html?ArticleID=210825

Best Practices reports available

- Beth Aaron
- Congregation Beth Israel of Northern Valley
- Jewish Center of Teaneck
- Temple Sholom
- Temple Beth Or, Washington Township
- Temple Emeth, Teaneck
- Temple Beth El of the Northern Valley, Closter

Videos available

January 24, 1999	Charting Your Course Rabbis Morris Allen, Kenneth Brander Steven Kushner
March 14, 1999	Blazing New Trails Rabbi Asher Lopatin, Dr. Bethamie Horowitz, Ellen Bernstein
May 16, 1999	Billboards or Bullhorns, Gary Wexler
October 24, 1999	Getting to Yes, Rabbi Laurence Rubinstein
March 3, 2001	From Pediatric to Lifelong Judaism Rabbi Alan Silverstein
October 27, 2002	Seeking out and Reaching out to the Unaffiliated Rabbi Ephraim Buchwald
January 25, 2004	Reaching the Millenials, Rabbi Hayyim Herring
May 2, 2004	Celebration SLI

ShulBiz – the SLI newsletter

Current year SLI programming

Articles available about: Fundraising, Programming, Synagogue governance, Membership recruitment, Strategic planning

Information about SLI

<http://www.ujannj.org/sli2>

SLI Strategic Planning Consultant

Dr. Nan Foltz

ntfoltz@aol.com

412-344-8640

Education

Ph. D., University of Pittsburgh, 1982

Consecration, Diaconal Minister, 1978

Certification, Director of Christian Education, 1965

M.A., Wesley Theological Seminary, 1965

B.A., Geneva College, 1963

Employment History

Established Nancy T. Foltz, Ph.D. and Associates, 1989-Present

Lead Planning Specialist, McNellis Creative Planning Company, 1988-Present

Adjunct Professor, Pittsburgh Theological Seminary, 1984-Present

Leadership Development Director, Western PA. U.M.C., 1984-1990

Myers Briggs Psychological Type Trainer, 1985-Present

Adjunct Faculty, LaRoche College, 1979-1980

Director of Operation Sunday School, Western PA. U.M.C., 1975-1984

Consultant, Educational Seminars, 1966-1973

Director of Christian Education, St. John's, Baltimore, MC., 1964-1965

Publications

Handbook of Planning in Religious Education, 1998

Caring for the Small church: Insights from Women in Ministry, 1994

Religious Education in the Small Membership Church, 1990

Handbook of Adult Religious Education, 1986

A Journey of Faith: Stories of Marriage and Divorce, a video series, Concept Originator, 1986

Television

Appeared on numerous televised programs, including Not Jus Sunday, KDKA, CBS affiliate and *Invitational Teaching*, satellite programming

Professional Memberships

American Association of Trainers and Developers

Association of Professors and Researchers in Religious Education

SLI Strategic Planning Professional

Naomi Yablonka Gewirtz, MSW

Naomig@ujannj.org

201-488-6800 ext. 278

EDUCATION

2006 Muehlstein Institute for Jewish Professional Leadership

UJA Federation of New York and Wagner School of Management, New York University

2006 Muehlstein Overseas Seminar

St. Petersburg, Russia & Israel

Master of Social Work, Rutgers, The State University of New Jersey, 2000

Concentration in Administration, Policy and Planning

Bachelor of Science, Social Work, Indiana University, 1999

EMPLOYMENT

UJA FEDERATION OF NORTHERN NEW JERSEY 2007-Present
Strategic Planning Coordinator

Union for Reform Judaism 2001-2007
Assistant Director, Outreach & Membership

UJA MetroWest 2000-2001
Campaign Associate, Young Women's Division

Generations Counseling & Care Management 1999-2000
Geriatric Social Worker

Indiana University Law School 1998-1999
Guardian Ad Litem

VOLUNTEER EXPERIENCE

Historic New Bridge Landing Park Commission, Teaneck Representative 2007

Jacobs Ladder, A Hurricane Katrina Relief Project 2005
Volunteer Coordinator
Utica, Mississippi

INSPIRATIONAL EXCERPTS

The full text of these excerpts is available through the SLI office.

From **A Transformational Model of Planning** by Nan T. Foltz, PhD.

Every planning team works in behalf of a larger body. Planning teams listen to the history, the present reality and the desired future of the congregation. Planning is a conversation, which needs *all* voices at the table. When a team begins its work, it comes to planning sessions bringing the voices who are not present – the Temple’s founders, those who have gone before, those who live in the greater community, those who are not active in the synagogue, those who are, and those who in five years will be. This is a large view planning reality. We do not plan for ourselves; we plan on behalf of a larger body. Planning begins with taking stock of where you are as a congregation.

Change will happen whether or not you plan. When a congregation actively participates in its future, it talks together about its desired dreams, hopes, life together. It determines what is happening in the larger context of the synagogue. Learning about the community and beyond is important information. Knowing the history of planning for the congregation, and what plans have been implemented and what plans have not been implemented is another part of planning.

Every congregation has a series of root stories that tell the history of who the Temple is and why they are the way there are. I love to hear these stories because through them I get a sense of the spirit of the congregation. The spirit of a congregation lives long into the past; it strengthens the present leaders’ energy, and it will ignite energy for the future.

From **The Front line is the Bottom Line** by Ron Wolfson

Try this little question: When you visit a Disney park, how many employees will you interact with on average before you get on the first ride? The answer-seven: the parking gate person, the parking lot attendant, the tram operator who takes you to the front gate, the ticket seller, the ticket taker, the person who sells you a Coke or rents you a stroller, the person who guides you into line, the person who puts you onto the ride. Every one of those interactions can be positive or negative. If any one of them is rude or unhelpful, your day is off to a terrible start. So, every Disney employee is trained to be a greeter. They know that the front line is the bottom line.

Is not the same thing true for the synagogue? Who does a seeker or congregant meet when entering a synagogue? A parking attendant, a security person, the custodian, the gift shop person, the front office receptionist, the staff secretaries, the kitchen crew, the caterer, the school office staff, the religious school teachers, the *shammes*, the executive director, the cantor, the rabbi-every one of these people, professional or lay, represents the congregation. Every one has the potential to make every interaction with members and guests a positive experience.

From **Synagogues That Work** by Sidney Schwartz

I want to suggest that synagogues should pair every child up with an adult in the community who is a positive Jewish role model. The purpose of this pairing is to create a mentoring/role model relationship for the student. It is relatively easy to suggest dozens of appropriate activities for the pair to engage in. When we did this in my congregation, the experiences varied widely in terms of frequency of contact. It was originally conceived of as a tutoring relationship in cases where the parents had no ability to help their children with Hebrew language assignments. But in many cases, the relationships blossomed into regular outings and the sharing of a wide array of experiences. In most cases, the pairings were with adults whose children were already grown. Not only do those adults have more time available, but they also begin to play the role of pseudo-grandparents.

The effect of the program is transformative for the entire congregation. First, it connects the adults with the “netherworld” of youth in the community in a way that rarely, if ever, happens. Second, it sends the message that the entire community needs to take responsibility for raising the next generation of Jews.

From **Return of the Unaffiliated** by Judy Beck

I am proposing that every congregation, no matter the denominational stream, make altruistic outreach to those unconnected individuals and families a priority. Congregations should offer programs, havurot, and services to any and all members of their local Jewish community, whether they are dues-paying customers or not. The goals must be to connect people to God and to Judaism, not to get paying members for the shul. Of course, synagogue programs cannot be same-old, same-old. They must be focused on the interests and needs of the targeted audience. Whether it be Hebrew reading or positive parenting, the aim is to get people connected to each other and to the Jewish community. It is important to remember that it is hard to be Jewish alone. Of course, the hope is that, ultimately, individuals participating in these programs will connect to the synagogue and will become dues-paying members of not only the synagogue, but also other communal Jewish institutions as well.