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LONG-RANGE PLANNING
FOR CONGREGATIONS

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UNION FOR
REFORM JUDAISM

האיחוד ליהדות רפורמית

SERVING REFORM CONGREGATIONS IN NORTH AMERICA

■ INTRODUCTION

Cultivating the Future: Long-Range Planning for Congregations is a project of the Ida and Howard Wilkoff Department of Synagogue Management of the Union for Reform Judaism (the Union). The department provides assistance to Union member congregations in all areas of synagogue management and administration. The department and the Joint Commission on Synagogue Management, in cooperation with the National Association of Temple Administrators, develop materials for and provide consultations to congregations throughout North America. The department strives to help congregations build, develop, and maintain well-run, spiritually fulfilling congregations, in which the sacred informs the practical and the practical creates the sacred.

■ ACKNOWLEDGMENTS

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■ PREFACE

Yours is not the only congregation facing challenges.

Some time ago, the Ida and Howard Wilkoff Department of Synagogue Management received a call from a person who identified himself as Rabbi Noah from Congregation Bat Yam. He said that his members meet on a boat. All of his lay leaders are animals, the president is an old goat, and the head of the Executive Committee is an ostrich. The place smells like a zoo.

The vessel is too small for the congregation. Everyone argues about whose job it is to make decisions. A chimpanzee is the chair of the Religious School Committee. The cantor is always getting her feathers ruffled, and the administrator is a pig. The leadership has encouraged only couples to join but provides very few activities for them. Some of the younger frogs have jumped ship, and several birds have flown the coop. There is no interaction with anyone outside the congregation.

They can never decide what to serve at the *Oneg Shabbat*: Everyone wants something else. Some of the young rodents in the youth group are afraid to attend board meetings because they don't want to be eaten by the jackal who is the chair of the Finance Committee. The wolves and sheep serve on the Budget Committee but can't work together cooperatively. Many of the congregants are resentful because the leopards refuse to give up their spots near the bimah and the lions have withheld their portion of the fair share plan. Congregational meetings are marked by cacophony, are dominated by the donkeys and hyenas, and only lead to further divisiveness.

We tried to help Rabbi Noah address these issues systemically. We suggested that he and his congregation engage in a process whereby they would clarify the congregation's vision, mission and goals. We urged them to explore how these are reflected in the congregation's governance structure and are communicated to its members. We suggested that they try to determine what the members want, need, and expect from the congregation and identify ways to make the synagogue a significant part of its members' lives. In a conference call with Rabbi Noah and his lay leadership, we discussed the importance of recognizing that there are many groups within their congregation and that they must develop ways to serve each one.

Rabbi Noah recently called us with an update. They still have a long way to go, but they have made the following significant strides forward:

- They have recruited a young mother giraffe who is not afraid to stick her neck out as chair of the Long-Range Planning Committee. Under her direction, the committee has formed focus groups that bring together representatives from all factions of the congregation to discuss their vision of what the congregation can be.
- They have begun to print their newsletter in several different languages and to provide translators at Shabbat services.
- The elephant, a past president and founding member who constantly reminds everyone that he remembers everything about the congregation since it was founded, has been made the temple historian. He produces archives, exhibits, and a monthly newsletter column about significant events in the congregation's history.
- They have created new learning opportunities to increase their exploration of their differences and have begun to discuss the strength that is derived from a range of viewpoints.

- The rabbits have begun to teach a course for couples on Jewish family values.
- The board has approved a facility expansion, and the Building Committee is searching for an architect who can measure in cubits so that the integrity of the original design will be preserved.
- They have reached out to the community to share one another's resources. For example, they have received extra income by providing meeting space for the local chapter of Alcoholics Anonymous. After Rabbi Noah began attending some of the meetings, his sermons became easier to understand, and the leadership agreed to serve an alternative to wine at every *Oneg Shabbat*.
- They continue to grapple with their various problems.

If this scenario sounds even vaguely familiar, read on! Long-range planning helped Rabbi Noah and his diverse membership focus on their shared goals, celebrate their differences, and in effect create a rainbow congregation in which everyone's colors will shine brightly. Together they are committed to developing a vision and mapping out a path that will help them reach a safe harbor of spiritual fulfillment for generations to come.

The process and discipline of long-range planning can also help your congregation achieve its future goals. This guide has been designed to assist you with your long-range planning efforts. As always, our department is here to answer your questions. Good luck!

■ WHY PLANT? THE GOALS OF PLANNING

If people do not plow in the summer, what will they eat in the winter?

Midrash Mishle 6

Honi ha-Me'aggel once saw on his travels an old man planting a carob tree. He asked him when he thought the tree would bear fruit. "After seventy years" was the reply.

"Dost thou expect to live seventy years and eat the fruit of thy labor?"

"I did not find the world desolate when I entered it," said the old man, "and as my fathers planted for me before I was born, so do I plant for those who will come after me."

Taanit 23a

Jews have always nurtured their synagogues. As a *beit t'filah*, "house of prayer," a *beit midrash*, "house of study," and a *beit k'neset*, "house of meeting," the synagogue has always been the pivotal symbol of religious identity and communal life wherever Jews have lived. A synagogue is a community's precious possession, the most influential institution for the preservation of Judaism. It must be nurtured by the present generation so that it survives, strengthens, flourishes, and provides sustenance to the next. Long-range planning is a crucial component of this sacred care.

Today, even thriving synagogues struggle with financial problems, disagreements among members, changing community demographics and family structures, societal pressures, aging congregations, the apathy of the young, the indifference of the unaffiliated, and/or competition from the general culture. Leaders must plan for the future so that their synagogues can cope with change, attract unaffiliated Jews, grow, and remain positive central forces within the Jewish community.

Taking our theme from the old man and the carob tree, we must do one of the major things that farmers or gardeners do naturally: We must plan.

■ **PLANNING AS A SACRED TASK**

Synagogue leaders cannot separate their planning efforts from the exalted purpose of the institutions they serve. They must work to make their congregations places of refuge from the senseless violence and turmoil found in so many other sectors of our society today. Innovative planning can help our synagogues become havens in which people can be part of a community, connect with one another, reflect, pray, dream, ask questions, and seek answers. Rabbi Abraham Joshua Heschel asserted that we are God's partners in *tikkun olam*, the "repair of the world." Leaders intent upon improving our congregations are *k'lei kodesh*, "holy vessels," who seek to transform their synagogues into more spiritually fulfilling communities.

■ **PLANNING AS A RATIONAL TASK**

Planning is also a rational process. It requires that a congregation ask itself where it is right now; where it would like to see itself at a given point in the future; and how it must go about getting to that point. Thus planning is goal oriented and geared toward change. The planning process itself may help to achieve the congregation's goals since broad participation among members engenders loyalty and increases their personal stake in strengthening the synagogue.

PLANNING TERMS

It is helpful to know the terms used by professional planners to describe the planning process.

They speak of two kinds of planning:

Strategic planning refers to the kinds of programs and services the congregation will be called upon to provide in the future.

Operational planning, in contrast, is the process of thinking about the ways in which the synagogue can best organize itself internally in order to provide the desired services and activities.

Two goals of the planning process are:

Efficiency How well does the process work? A dues program is efficient if members receive accurate and complete statements at minimum cost within a few days of the first of the month.

Effectiveness How well does the program or activity accomplish its aim? A dues program is effective if all members have been persuaded to pay their full dues with minimal delay.

■ **PLOWING THE SOIL: PREPLANNING**

THE PEOPLE YOU NEED

To be successful, the planning process and subsequent changes will require the intense involvement and cooperation of the entire congregation. However, the earliest stage of the process concerns one group of individuals, generally called the Long-Range Planning Committee.

Preplanning involves two major elements: selecting the people who will serve on the Long-Range Planning Committee and building that group into a cohesive team.

The planning process proceeds best when a consistent leader, usually the chair of the Long-Range Planning Committee, directs the planning activities. It is also vital that the clergy and staff be involved throughout the process. Many congregations have found it helpful to engage an outside consultant to assist with the critical initial stages of long-range planning. Others have used consultants for the whole process. In both cases, the leadership of a committed congregant, in the person of the chair of the Long-Range Planning Committee, is vital to the success of the project.

■ **WHO WILL LEAD THE PLANNING PROCESS?**

THE CHAIR OF THE LONG-RANGE PLANNING COMMITTEE

Whether or not a congregation chooses to utilize the services of a consultant for some or all of the planning activities, it is important that a congregational leader be at the helm during the course of the planning period. While a leader from within the congregation may lack the level of technical expertise possessed by a professional, he or she is more likely to provide institutional credibility—a sense that the synagogue is embarking on an internal organic process led by an individual who knows it from within. A congregant who spearheads the planning activities should have the following qualifications:

- The respect of the congregation
- The trust of the clergy
- Some understanding of group processes
- A grasp of the theoretical material
- Leadership skills
- A strong commitment to the long-term health of the congregation
- A deep sense of Jewish identity
- Some experience in strategic planning in the business world

A CONSULTANT

A consultant may

- Possess expertise in and experience with group dynamics that congregants may not have
- Bring a more objective perspective to the task
- Be taken more seriously as an “authority” because the congregation has paid for his or her expertise
- Be a catalyst

THE LONG-RANGE PLANNING COMMITTEE

People need to be transformed from being centered on themselves and what the congregation can do for them into servants who ask what they can do to serve God, given their gifts and talents.

Discerning Your Congregation's Future
Roy M. Oswald and Robert E. Friedrich, Jr.
The Alban Institute, 1996

The Long-Range Planning Committee ideally consists of a cross section of the congregation, between five and nine people who are committed congregants and who understand the process. Members should know in advance that they will be involved in time-consuming and intensive work but that it will be completed at a specified time and they will then be able to enjoy the results of their efforts.

The committee should include the rabbi(s). It should also consider the input of the professional staff, since their perspectives are unique and essential. In addition, other congregants should be encouraged to become involved in subcommittees, data gathering, and focus groups.

Congregational acceptance of any change is easier if a representative and cohesive group has been involved in the planning process. Therefore, it is essential that adequate time and effort be allotted to “team building.” The following are ways to strengthen the Long-Range Planning Committee.

Integrate the Sacred Since insuring a synagogue's future is not and ought not be a commonplace activity, begin each meeting with a spiritual dimension, which may include a d'var torah, a meditation, a relevant reading, a group reflection, or prayer. These sacred moments will help people make the transition from their everyday lives to the holy business of the session and focus on the exalted work they have chosen to do.

Connect As a Community Chances are that people have volunteered for the task at hand because they want to be more fully involved with the synagogue and with other people in the congregation. Help your committee members to connect to one another by allotting five or ten minutes of each meeting to having them share their personal feelings and goals, their views on synagogue matters, or anecdotes about their day.

Evaluate Meetings No planning meeting should end without some moments of reflection about how participants felt they worked together to address the task at hand. A critique period at the end of each meeting may give the leader some discomfort but often results in subsequent meetings that are shorter, more productive, and more satisfying. Most important, meeting critiques can help the group coalesce.

Schedule an Opening Retreat One of the best techniques for developing group cohesiveness is to undertake a one-day or weekend-long retreat. It should be held at a time when the greatest number of people from the Long-Range Planning Committee can attend, at a site away from the synagogue where participants will share meals and be free from distractions. The purpose of such a retreat is

- To orient participants to the planning process by asking them to consider what they feel are the two or three most critical changes needed and the most significant barriers to making those changes
- To explore several fundamental theories defining healthy congregational life
- To discuss goals that could move the congregation to greater health
- To encourage participants to share their visions about the ways in which they wish to strengthen the synagogue

Subcommittees The work of the Long-Range Planning Committee will be easier if it establishes several critical subcommittees at the beginning of the process. These should include Communications, Demographics, Focus or Small Group, and Retreat Subcommittees.

- The Communications Subcommittee will be responsible for ongoing communication with the congregation throughout the planning period. Instituting change is very difficult, and the more the congregation understands the process, the better prepared it will be to participate in and embrace the transformation. The Communications Subcommittee can use the newsletter, special notices, the bulletin board, letters to the congregation, and committee meetings to get out the word. It will work with the rabbi(s) to insure that aspects of the planning process are communicated through sermons and pulpit announcements.
- The Demographics Subcommittee will take charge of gathering the required demographic information about the congregation.
- The Focus or Small Group Subcommittee will plan for and facilitate focus group meetings.
- The Retreat Subcommittee will plan and facilitate the retreat.

■ FERTILIZING THE SOIL CONGREGATIONAL SELF-ASSESSMENT

You should not look at all the bad things in your life and say, "Now I will improve myself." Rather, you should look at your positive traits and dwell upon your goodness. From there you can say, "Now I will improve myself."

Rabbi Nachman of Bratzlav

Before a synagogue can determine where it is going, it needs to know where it is. Therefore, leaders must thoroughly evaluate all aspects of congregational life. Consider the following six areas.

THE SYNAGOGUE VISION, MISSION, AND GOALS

When there is no vision, the people perish.

Proverbs 29:18

Vision should always be the starting point of any congregational long-range planning. A vision is a congregation's articulation of a destination for which it collectively aims. It describes a future that is better, more successful, and more desirable for the synagogue than the present. There is no more powerful force driving a synagogue toward excellence and long-range success than a compelling, worthwhile, and achievable vision of the future that is widely shared by its members. If the leadership of the synagogue is not willing to dream dreams and entertain visions for the congregation's future, then it should probably not be involved in strategic planning.

Some Questions to Ask What brought you to this congregation? Why did you choose this congregation rather than some other? What are your dreams for this congregation?

How to Get the Answers Informal discussions among the leadership and individuals in the congregation can provide some of the answers to these questions. Time should be spent at the planning retreat and early planning meetings to explore such issues.

Develop a Vision Statement A well-articulated vision or mission statement provides a congregation with the following benefits:

- It attracts commitment and energizes people.
- It creates meaning in the lives of lay leaders, members, and staff.
- It bridges the present and the future.
- It empowers the people who are involved with the synagogue.

Questions a Vision/Mission Statement Should Answer

- What is unique about us?
- What values are our true priorities for the coming year?
- What does the world/community need that our synagogue can and should provide?
- What do I want our synagogue to accomplish so that I will be committed to, aligned, and proud of my association with it?

SERVICES

Some Questions to Ask What does the synagogue now offer its members? To which specific groups are these offerings directed, and what proportion of these groups participates? Where and when are these services offered? What is the quality of these activities? What does it cost in money and personnel time to make them available?

How to Get the Answers Information about services can be gleaned from congregational questionnaires, telephone calls, informal conversations, and focus groups (see p. 10).

SAMPLE MISSION STATEMENT

The mission of Westchester Reform Temple is to insure the perpetuation of the Jewish people and to cultivate a love of our Jewish heritage: God, Torah, and Israel.

We hope to realize this through:

AVODAH Worship of God in a Reform Jewish congregation that seeks to offer a variety of traditional and evolving spiritual practices for the religious development and fulfillment of our members.

CHAVURAH An open, dynamic community of women and men of all ages and sexual orientations and families of all configurations and backgrounds, all committed to creating a warm and welcoming Reform Jewish congregation.

TALMUD TORAH An enlightened program of Jewish learning for all members, young and old.

TIKKUN OLAM Commitment to the ideals of our Jewish ethical heritage and to the prophetic work of meeting our responsibilities to our community, our nation, and our world.

K'LAL YISRAEL Strengthening our commitment to Israel and the Jewish people of all lands and working to establish understanding and commonality among the various expressions of Judaism.

RESOURCES

Some Questions to Ask What are the congregation's human, physical, and financial resources? How do we use them?

How to Get the Answers The officers of the congregation, the synagogue administrator, as well as the Finance and Operating Committees can provide this information. Also, allot time to thoroughly examine the synagogue's financial reports.

CULTURE, HISTORY, AND UNIQUENESS

Some Questions to Ask What characteristics make our congregation special? How does our synagogue compare with others in the community? What are our shared myths?

How to Get the Answers Schedule an evening of historical reflection, during which participants will have the opportunity to recall the congregation's past and remember its trials and triumphs. This exercise should be fun, gratifying, and enlightening to old-timers and newcomers alike, as you review the experiences of the synagogue's past years.

Interview key people in the congregation and the community who are the best qualified to assess your community's needs. Discuss your synagogue's place within the larger community. Ask these leaders the following two questions:

- What do you think are the most urgent needs in our community?
- How do you think a congregation like ours is helping or can help to meet those needs?

LEADERSHIP

Some Questions to Ask Are we young or mature? Are we long-term oriented? Do we tend to be cautious, or are we willing to try new things and experiment? Do we encourage new leadership? Are we religiously committed to our faith and Jewish peoplehood?

How to Get the Answers Much of this information will surface during focus groups, home meetings, informal discussions, telephone conversations, and historical reflection.

POPULATION DEMOGRAPHICS

Some Questions to Ask Where do our congregants live in the community? How old are they? From where are our new members coming? What changes in family structures are we experiencing? In what ways has our community changed?

How to Get the Answers Congregational records will provide some of this data, as will telephone surveys. Local boards of realtors, the United Way, government planning agencies, and Jewish Federations can also be helpful sources of demographic information. A membership questionnaire is another way to collect this kind of data. However, some synagogues report that utilizing a questionnaire did not prove to be as successful as they had hoped it would be. Frequently the number of responses was too low to present a true profile of the congregation.

■ **USING THE SWOT METHOD**

As members of the Long-Range Planning Committee gather information, they will begin to develop a broad picture of the critical issues that face the congregation. The SWOT (Strengths, Weaknesses, Opportunities, Threats) method is a helpful tool for analyzing such issues.

Strengths What are the positive aspects of the operation and culture of the synagogue and its programs as well as its tangible and intangible assets that could positively impact its performance? What are we doing well?

Weaknesses What are the negative aspects of the operation and culture of the synagogue and its programs as well as its tangible and intangible liabilities that could negatively impact its performance? In what ways are our programs, policies, or activities weak? In what ways do they fail?

Opportunities What aspects of the environment could have a positive impact on the synagogue's future performance? What opportunities for change, improvement, or excellence does this situation give us?

Threats What aspects of the environment could have a negative impact on the synagogue's future? What are the obstacles to change or improvement? Committee members should be aware that threats to change may come from both within and outside the congregation.

■ **SOWING THE SEEDS: INVOLVING THE CONGREGATION**

If one takes in hand a number of reeds bound together, can one break them? Only if they are separated, each from the other, can they be broken.

Tanchuma Nitzavim 1

Change is unsettling. It is incredibly difficult to get the majority of members to agree on a common set of goals and objectives. But precisely because some people will always resist change, it is important to elicit involvement from the entire congregation. The more members become engaged in the planning process, the more they will feel that they have contributed to defining the final goals and the more likely they will be to endorse transformations.

It is vital to any process of change that the congregation be informed and up to date about the progress of the planning activities through regular newsletter articles, bulletin board notices, letters, and other appropriate methods of communication.

FOCUS OR SMALL GROUP MEETINGS

Focus or small group meetings can be a valuable tool for obtaining the consensus that creates strength.

A small group meeting is a gathering of not more than twelve people, generally held in someone's home, that allows the participants to comfortably express their feelings about the synagogue and share openly with others. In order to insure the broadest participation, have the hosts invite the guests personally, and arrange the guest lists so that members are invited to homes in which they will be comfortable. It is preferable if the guests at these meetings are representative of the entire membership—young families, retirees, youth, etc.—so that a variety of points of view is elicited. Structuring meetings in this way can provide a valuable bonus: Individuals who may ordinarily not have the opportunity to meet will connect. These new bonds will strengthen the sense of community within the congregation, thereby reinforcing the planning process. In order to involve as many participants as possible, synagogues may choose to schedule small group meetings at the temple when congregants are normally there, for example, when parents drop their children off for nursery school or when senior citizens are engaged in activities that interest them. These latter groups tend to be more homogeneous.

A Blueprint for Small Group Meetings

- In advance, designate a leader and someone to keep accurate notes.
- Gather informally and enjoy simple refreshments.
- Open with a prayer or *d'var Torah*.
- Introduce the leader and host. Briefly explain what the task force is and stress the importance of the gathering.
- Conduct a team-building exercise. Emphasize that confidentiality will be maintained. Although comments will be reported accurately, names will not be attached to the comments. Then ask each person to state his or her name, how long he or she has been a member of the congregation, and what originally drew him or her to this synagogue.

The Four *Kashas* and One More

The small group meeting is designed to encourage “brainstorming,” the free flow and sharing of congregants’ ideas. It is not a vehicle for reaching consensus on the most important or relevant issues. Participants should be reminded not to judge or comment on the perspectives of others in the group.

To get the discussion going and elicit the reflections of the participants on the strengths and liabilities of the congregation, you might ask them to fill in the blanks in the following statements:

1. If our congregation did not continue to _____, I would lose interest in remaining a member.
2. The things that concern me most about our congregation are _____.
3. If our congregation would _____, I know I’d call my friends and tell them what wonderful things they are missing.
4. If with the stroke of a pen I could change one thing about our congregation, I would _____.
5. The two or three most significant changes I would like to see in the congregation are _____.

Summarize the Meeting

At the end of each small group meeting, the member of the Long-Range Planning Committee who has chaired the meeting should review the recorder’s notes. Completing the following statements can help the meeting chair synthesize the proceedings:

1. This meeting has given me three key insights. They are _____.
2. As people look to the future of this synagogue, they are focusing their anxiety on _____.
3. As people look to the future of this synagogue, they are expressing optimism about _____.
4. My sense is that _____ keeps these people committed to this congregation.
5. The committee needs to direct attention to the following areas of concern: _____.
6. People want to become involved with the following issues: _____.

■ NOURISHING THE PLANTS DEVELOPING A STRATEGIC PLAN

MAKE IMMEDIATE POSITIVE CHANGES

Any attempt to revise long-standing practices will trouble people who are used to doing things a given way. They may feel threatened and anxious. For this reason, if future planning is to succeed, it must proceed at a pace calculated to minimize such negative feelings. Therefore, small

increments of modest positive change should be made throughout the planning process. When people see and are part of positive change, they become increasingly open to new alternatives. As such good experiences proliferate, the image of the synagogue's future will come more clearly into focus, members' commitment to the congregation will grow, and the planning process will gain advocates and momentum.

For example, Temple Beth Israel in West Hartford, CT, was involved in examining its traditions regarding bar and bat mitzvahs. Rather than embark on large and potentially controversial changes, temple leaders agreed to start with one small change: The Auxiliary presidents would give gifts to the *b'nei mitzvah* during services. This was a step that won universal acceptance and paved the way for further creative changes.

SET GOALS AND OBJECTIVES

After the mission has been articulated and considered, the demographic statistics gathered, the history of the congregation reviewed, the synagogue's strengths and weaknesses evaluated, the membership allied and convinced of the need for change; after the synagogue has taken a good, hard look at where it is and how it got there; after all the information has been sifted, it is time to articulate the specific goals and objectives of the process—the strategic plan.

Goals are brief statements of the general direction in which the synagogue must move in order to fulfill its mission.

Objectives are the specific outcomes and results that will be derived from the organization's mission and goals. An objective should contain the following three components: (1) quantity (how much?); (2) time (when?); and (3) quality (how good?).

PRIORITIZE THE GOALS AND OBJECTIVES

Focus on the interim goals statements that have been distilled from the work that has been done. Determine the top six to eight goals that are most important to the congregation. Answering the following questions can help your congregation generate a plan for the future:

- Based on what we know about our synagogue's current worship services and programs and what we judge the synagogue will be required or would like to do for its members and community in the future, what services and activities must we now plan to provide for the future?
- We know how we have been raising and spending our funds up to this time and we have weighed whether we have been doing those things wisely. Should we continue to utilize the same approach to raising funds in the future? Will we continue to allocate funds in a similar manner? Or will circumstances, as we see them now developing, call for an entirely new approach?
- Is it wise for us to continue the practices that have drawn people to our congregation in the past, or must we seek a different path in order to meet our future goals?
- Having examined our current leadership and their effectiveness, have we ascertained the need for leadership development and training? What can we do to create a cadre of qualified future leaders? What qualities should we emphasize when choosing our future leaders?

■ REAPING THE CROP: WRITING THE PLAN

A written plan will both outline the relevant information gleaned from the planning process and describe the specific means that must be used to implement strategies and reach objectives. It will assign responsibilities and outline a time line. It should also address the following five questions:

- What are the specific steps/actions that must be taken?
- Who will be accountable for insuring that each step/action is completed?
- When will these steps/actions be carried out?
- What resources are required in order for them to be carried out?
- What feedback mechanisms are needed to monitor the progress of each step/action?

Written plans vary widely, depending upon the needs and resources of the congregation. Most reports are between ten and twenty pages long. The Union's own long-range plan consists of twelve pages of small type. Some congregations that have used outside consultants have developed book-sized plans. What is most important is not the length of the plan but that it is useful and realistic, that it can and will be implemented, and that it clearly defines the steps required to achieve positive change.

After the written plan has been shared with and critiqued by the Long-Range Planning Committee, it should then be distributed to the Executive Committee and the Board of Trustees for their input and approval. Ultimately, the plan must be shared with the entire congregation. Circulating a summary of the plan and holding a general meeting about it are good ways to communicate the information to and elicit the endorsement of the membership.

However long the planning process has taken—and it can last from six months to two years or more—if it has been done well, it has probably drawn upon the hard work, passion, and commitment of scores of synagogue leaders and members. Don't disappoint them. If the plan is not implemented in visible ways, if it remains just a report filed somewhere in the synagogue office, the congregation will not elicit the assistance and involvement of its members the next time around. It is better not to ask for participation than to get it and not follow up.

■ THINK SMALL AN APPROACH FOR SMALL CONGREGATIONS

וְכֹל־הַמְקַיִּים נֶפֶשׁ אַחַת מִבְּנֵי אָדָם, מַעֲלָה עָלָיו הַכְּתוּב כְּאִילוּ קָיִים עוֹלָם מְלֹא.

ONE WHO SAVES A SINGLE SOUL, IT IS AS IF THAT PERSON SAVED THE ENTIRE WORLD.
MISHNAH SANHEDRIN 4:5



Recognizing that more than half of the congregations that constitute the Union for Reform Judaism have fewer than 250 membership units, the Ida and Howard Wilkoff Department of Synagogue Management provides a variety of services tailored to small congregations. These include programmatic materials, consulting services, e-mail discussion groups and the Small Congregations Resource Fund (a program that provides grants for participation in Union-sponsored events and loans for a variety of temple needs). In addition, the department's publications address the specific needs of small congregations.

Perhaps after reading the preface on page 1, for a moment you, too, thought you were a member of Congregation Bat Yam. Many a small congregation has a lot in common with Rabbi Noah and his synagogue. When it comes to long-range planning, small congregations face unique opportunities and challenges. Every voice can be heard, and individuals can make significant contributions in the present that can have a potentially considerable future impact. On the other hand, energy often has to be focused on the here and now, not the future. With few if any staff members and a tight budget, small congregations frequently have no choice but to constantly deal with day-to-day issues, leaving precious little time and energy for thinking about the future or planning for it. When a congregation has insufficient volunteers to staff the existing committees, the thought of creating a new committee for long-range planning seems overwhelming.

For small synagogues, long-range planning is essential. The loss or gain of even a few members can have a great effect on the entire congregation. A change in income or expenses, the loss of a staff member or devoted volunteer, and shifting demographics can all have an impact on the community. Planning ahead can help your temple deal with change and accomplish its goals.

If identifying volunteers to serve on committees has been challenging, think in terms of a Long-Range Planning Task Force. Consider creating a time line so that committee members will know for how long they are expected to serve on the task force. This presents an excellent opportunity to enlist past presidents of the congregation: They may not only have volunteer time on their hands, their input and status in the synagogue will imbue the task force with a sense of importance. This, in turn, will transform the experience of serving on the Long-Range Planning Task Force into a coveted volunteer opportunity!

One of the main tasks of long-range planning is congregational self-assessment. This can be accomplished via a variety of formats, including focus groups. Small congregations might consider making the annual or semiannual meeting of the temple a focus group meeting. This might not only help boost attendance at these meetings, it may also prove to be an efficient way to reach a large number of congregants at one time.

Long-range plans often take into account the staffing needs of the congregation. The addition of clergy and staff has a great impact on the budget and must be taken into consideration. Think about beginning with a job description and focusing on the needs of the temple. It is also important to plan for benefits and insurance consequences.

Changes in membership will have many ramifications throughout the temple. If the congregation is becoming smaller over time, how will this affect staffing needs? As membership decreases, income will most likely decrease as well. Through long-range planning, perhaps other sources of income can be identified. If a congregation is growing or planning to grow, this, too, may affect staffing needs: Will more teachers be required? Will the student rabbi be needed more than once a month? While an increase in membership may not immediately require a major addition to the synagogue building, it may result in the need for more prayer books and perhaps relocation to a larger space for the High Holy Days.

As the Long-Range Planning Task Force creates its plan, it is important for its members to be realistic: They must stay focused on projects that can be accomplished. Excitement can be generated by identifying and implementing several small but noticeable changes. Establishing a time line for action items will keep everyone focused on moving the plan ahead. While reaching the goals of the plan is important, so, too, is the very process of long-range planning. It offers a wonderful way to learn about the congregation, bring members together, and create meaningful volunteer opportunities.

■ ENJOYING THE FRUITS OF POSITIVE CHANGE: THE FIVE P'S OF PRODUCTIVE PLANNING*

Purpose There needs to be a clearly articulated reason that is widely understood and accepted in order for a synagogue to commit to a planning effort.

People Effective planning requires the active involvement and commitment of synagogue leaders and the participation of the clergy and key congregants.

Process There needs to be a clearly delineated set of activities that facilitate the development of a plan involving key congregants in making decisions about the current and future state of the synagogue.

Product The planning process normally results in a document that facilitates organizational change and provides guidance and direction to the congregation.

Progress The plan should result in real changes that improve what the synagogue does and/or how it functions. These changes should accelerate the congregation's progress or increase its capacity to execute its mission and achieve its goals.

* Adapted from The How & Why of Long-Range Planning presentation by Dr. Marc Salisch at the 1997 Union Biennial.

TILLING THE SOIL FOR NEXT YEAR'S CROP: ONGOING REVIEW

We chose the symbol of agriculture to represent the process of future planning because it fits so well. Planning, like agriculture, is cyclical, labor intensive, dependent upon “the weather” of external threats and opportunities, and a task that never really ends. Even as one crop is being reaped, the farmer is preparing the soil and planning for the next. So it is with long-range planning. A mechanism for ongoing review should be developed to augment the written strategic plan. The Long-Range Planning Committee should monitor the effectiveness of every step in the process, use multiple communication resources to relay the essence of the plan to the congregation, and encourage members' support for pending changes.

■ A LONG-RANGE PLANNING TIME LINE

Although long-range planning is a process that is time and energy consuming, its rewards can be exhilarating. The process may take from six months to more than two years, depending upon the goals, leadership, and resources of the congregation. Below is a general description of the activities involved in a typical long-range planning initiative. Some of the activities described may occur simultaneously or may overlap.

1. The synagogue leadership decides that long-range planning is necessary for the future health and growth of the congregation.
2. The president of the congregation designates the chair of the Long-Range Planning Committee, and committee members are recruited.
3. Synagogue leaders, the Long-Range Planning Committee chair, and the committee members choose a consultant if they decide that outside assistance would be beneficial.

4. The Long-Range Planning Committee forms Communications, Demographics, Focus or Small Group, and Retreat Subcommittees.
5. The consultant, chair, and committee develop an outline of planning activities.
6. The committee holds an opening planning retreat at which members will:
 - a. Learn about the planning process
 - b. Articulate the synagogue vision, mission, and goals
 - c. Practice team building
 - d. Outline areas for exploration
 - e. Share their hopes and dreams for the congregation
7. The Demographics Subcommittee gathers information about synagogue demographics and history.
8. The Focus or Small Group Subcommittee plans for and holds small group meetings with congregants.
9. The Communications Subcommittee regularly communicates the progress of planning activities to the congregation and, when appropriate, elicits feedback.
10. The Long-Range Planning Committee reviews and analyzes the data gathered by the Demographics Subcommittee and from the congregational small group meetings.
11. The Long-Range Planning Committee sets and prioritizes the synagogue's goals and objectives.
12. The Long-Range Planning Committee develops a written plan.
13. The Long-Range Planning Committee shares the plan with synagogue leaders.
14. Based upon the information gleaned, synagogue leaders make immediate positive small changes.
15. The Long-Range Planning Committee and synagogue leaders share the plan with the congregation.
16. The synagogue begins to implement the plan.
17. The Long-Range Planning Committee monitors the execution of the plan.
18. The entire congregation enjoys the results of the changes, many of which may come about slowly but will come surely.

Communication is vital to the success of any long-range planning endeavor. Information about activities should flow throughout the entire process by means of bulletin announcements, Web site postings, lobby signs, pulpit announcements, special letters, etc.

■ **SYNAGOGUES IN ACTION**

EXCERPTS FROM LONG-RANGE PLANS (ADAPTED)

THE SUBURBAN TEMPLE, BEACHWOOD, OH (554 HOUSEHOLDS)

MISSION OF THE FUTURE PLANNING COMMITTEE

- To survey the congregation and determine the demographics, the perceived needs of the congregants in various areas, and the reactions of the congregants to programs, ritual, religious school, and outreach activities;
- To hold a series of focus groups inviting the entire membership to share its vision of the future and reflect on the past and present mission and its implementation;
- To compile the results of the survey into an analysis of the data;
- To develop a mission statement for the congregation to be approved by the Board of Trustees based on the results of these determinations;
- To formulate a plan of action for the future that strengthens those areas the congregation finds positive, improves other areas to bring them to the level desired by the congregation, and uses demographics and financial forecasting to determine the means for meeting these challenges.

TEMPLE BETH EMETH, ALBANY, NY (1,046 HOUSEHOLDS)

PROJECT NORTH PORCH: OUTLINE OF THE PROCESS

When Beth Emeth's Board of Trustees decided to initiate the development of a long-range plan, much consideration was given to the process that should be followed.... The North Porch Committee was formed.

Developing a long-range plan involves four basic steps:

- A study of the current status and future needs;
- The collection and organization of data;
- The preparation of a plan, including recommendations for implementation;
- Putting the plan into action.

An additional yet equally important component is the continuous evaluation and upgrading of the plan based on changing needs and priorities.

The committee first met on . . . to learn about the process as recommended by our advisors. At that meeting, we conducted our own focus group, which subsequently became the format we used in the congregation.

After gaining insight into one another's concerns, a mission statement was developed. This served as our guide throughout the year and enabled us to keep our goals in mind as we progressed. The North Porch project was introduced to the congregation during High Holiday services, and we were on our way.

The congregation was invited to participate in a series of focus groups, during which specific and identical questions were posed. All comments by the participants were recorded.

The questions were:

- What changes would you like to see in Beth Emeth?
- What are the barriers to the implementation of those changes?
- What makes you feel good about Beth Emeth?

More than 300 members participated in exceptionally open and frank sessions. In addition to meetings for the general membership, there were special focus groups for the youth group, religious school teachers, and families concerned with intermarriage, as well as discussions with each professional separately.

Hundreds of comments were recorded. From them, the following five basic categories emerged:

- Caring Community
- Governance and Administration
- Religious School/Continuing Education
- Worship and Ritual
- Intermarriage

CONGREGATION BETH ISRAEL, WEST HARTFORD, CT (1,473 HOUSEHOLDS) PROJECT JOSEPH: GUIDELINES FOR THE FACILITATORS (OF FOCUS GROUPS)

I. Introduction

- Introduce yourself.
- Review the purpose of the focus group and its connection to the Future Planning Committee.
- Ask each person to introduce himself/herself (name, occupation, role/affiliation with congregation, something interesting about self).
- Discuss the schedule for the evening.

II. Starting the Exercise

- Review the discussion questions and write them on newsprint or a board. Clarify the questions, if needed.
 1. What are the two or three most significant changes that you'd like to see in the congregation during the course of the next few years?
 2. What obstacles might prevent such changes from occurring?
- Ask participants to write down their responses on a piece of paper to get their thinking started. Ask them to write quickly—papers will not be turned in.
- Go around the circle and ask participants to share their thoughts and ideas about the first question; repeat with the second question.

III. Managing the Discussion

- Encourage participants to refrain from making premature judgments on ideas presented. Focus on “understanding,” not agreement.
- Check out your understanding of participants’ comments as they occur:
 1. Summarize what you’ve heard, using participants’ words and phrases.
 2. Paraphrase, using your own words to verify that what you heard is what they meant.
 3. Acknowledge and repeat feelings expressed—concern, frustration, excitement—when appropriate.

IV. Bring the Session to a Close

- To wrap up, review the answers to the questions in II, above, as a group. Identify common themes or categories.
- Ask for feedback on the “process”: Did people find it interesting? Enjoyable?
- Review how the information will be used.
- Thank everyone and say good night.

TEMPLE BETH SHOLOM, SANTA ANA, CA (562 HOUSEHOLDS) FROM THE ACTION PLAN

Membership

GOAL: Recruit, integrate, and retain congregants to insure member satisfaction and participation.

ACTION ITEMS

1. Find innovative ways to attract prospective new members.
 2. Integrate new members into the temple.
 3. Expand our Outreach program.

ACTION ITEM 1: Find innovative ways to attract prospective new members.

- a. Invite new Orange County residents to be our guests during the High Holidays.
- b. Participate in “Shabbat Across America” and follow up on attendees.
- c. Sponsor events at TBS to which the unaffiliated are invited:
 - BBQ Boogie
 - December 25th Pancake Breakfast

ACTION ITEM 2: Integrate new members into the temple.

- a. Contact new members and invite them to temple services; introduce them to the rabbi, cantor, president, or any board members present.
- b. Have new member events to introduce them to other new members and the TBS board.
- c. Introduce new members in the Kol Sholom.
- d. Introduce them to the Chavurah program.
- e. Encourage active participation in TBS events. Establish a list of potential volunteers and circulate it to the various committees.

OR CHADASH, THE REFORM TEMPLE OF HUNTERDON COUNTY, FLEMINGTON, NJ (155 HOUSEHOLDS) EXCERPTS FROM THE STRATEGIC PLAN

Or Chadash Mission Statement (October 2004)

Or Chadash, the Reform Temple of Hunterdon County, is a growing congregation serving the Central New Jersey Counties of Hunterdon, Warren, Middlesex and Somerset Counties whose mission is to

- Integrate traditional values and customs with the needs of contemporary Jewish life
- Promote lifelong Jewish learning through a vibrant religious education program for our children and inspiring opportunities for adults
- Be an active participant in the ongoing well-being of the community
- Be open and inclusive to all people, regardless of prior involvement with Judaism
- Provide a caring network to the Jewish community, celebrating each other's joys and being supportive in time of need
- Challenge and encourage the members of the temple community to participate in the life of the temple

Or Chadash Vision

Or Chadash will be recognized in the community as a leading congregation that perpetuates our Jewish values through education, ritual, and outreach. A chart (see below) lists the current status and future view of where Or Chadash would like to be by 2010 in the following areas: membership staffing, leadership, governance, financial management, facilities, fund-raising, education, ritual, temple climate (a sense of community), social action, social, and interfaith outreach.

Issues

While there are a variety of challenges facing any non profit religious institution, once the initial “start-up” issues have been overcome (forming a congregation, building a temple, development of programs) and the temple hits a growth plateau, a new set of goals and plans need to be established to help the organization move forward to the next level. Or Chadash is now at that point.

Process

To develop a better sense of the thoughts and feelings of the temple’s membership, a comprehensive temple member survey was sent out between January and February 2005. In early April 2005, follow-up focus groups were conducted with a cross section of temple members, including teens. The results of the survey were presented to the temple’s Executive Board and the Board of Trustees in April 2005.

Based on results from the temple member survey, focus groups, and our own analysis, the Strategy Team has identified seven key areas we believe that the temple’s board must focus on to better support our mission and to ensure our long-term viability as a focal point for Reform Judaism in Hunterdon County. They are:

1. Update Operations/Improve Accountability
2. Build Membership
3. Improve Financial Management
4. Strengthen Core Fund-Raising Activities
5. Improve Facilities/Infrastructure
6. Increase Member Involvement and Volunteerism
7. Develop a Policy and Procedures Manual

Future View: Where We Would Like to Be in 2010

	Future View (by 2010)	2005 Status
<i>Membership Staffing</i>	200 members families Replacement for Eric Siroka in place (as of 2006)	158 member families Search for new rabbi underway
	Full-time administrative support	Part-time administrative support
<i>Leadership</i>	Active/robust committees with plans and objectives	Need to streamline number of committees, coordinate activities
	Continuing	Improve succession planning process
<i>Governance</i>	Board operates with transparency and openness	Improve accountability of and action orientation of board and committee chairs
<i>Financial Management</i>	In place	Use of standard/modern accounting practices (not there yet)
	Continuing	Streamline reporting of temple finances and provide accurate updates to the board regularly
<i>Facilities</i>	Define Phase II	Our own building
	Done	Improve temple sanctuary and increase feeling of "spirituality"
	Annually accomplished	Improve maintenance of the grounds and building, classrooms
<i>Fund-Raising</i>	Implement annual capital fund-raising campaigns	Modest fund-raising activities
	Increase outreach to greater business community	Need plan
	Better leverage the resources of existing members	Need plan
<i>Education</i>	Program expanded to include post-confirmation	Full-time program
	School director (paid position)	Volunteer school director
	Continuing	100% of fifth graders reading Hebrew
	Adult <i>B'nei Mitzvah</i>	Beginner and Advanced Adult Hebrew classes

Future View: Where We Would Like to Be in 2010

	Future View (by 2010)	2005 Status
	Expanded to meet the adult needs of the congregation	Active family education
	Continuing	Teacher continuity
<i>Ritual</i>	Continuing	Weekly services
	Increase attendance at services	Services could be better attended, more opportunities for member participation (<i>aliyot</i>)
	Some Saturday services other than <i>B'nei Mitzvah</i>	<i>B'nei Mitzvah</i> only
	Continuing	Holiday services
	Ritual event for the holidays	Need plan
<i>Temple Climate (a Sense of Community)</i>	Increase volunteering among temple membership	Needs improvement
	Increased member family involvement	Needs improvement
<i>Social Action</i>	Opportunities for participation in social action provided at least quarterly	Successful first year as sponsor congregation of IHN and ongoing mitzvah activities through religious school
<i>Social</i>	Provide more social activities that are simple to organize and inexpensive to coordinate	Minimal social activities to help spur contact between members
	Congregation	Need plan
	Continuing	Sisterhood
	Continuing	Brotherhood (just beginning)
	Continuing	Youth groups
	Empty nesters	Need plan
<i>Interfaith Outreach</i>	Integrate Outreach ideals into Shabbat services and other temple activities	Three years of Interfaith Outreach programming reaching a variety of ages and backgrounds
	Have an active Interfaith Outreach Committee that works with other committee chairs to incorporate Outreach ideals into temple activities	No current Interfaith Outreach chairperson

■ NOTES

THANK YOU

Your membership in a Union congregation
has made the Reform Movement the largest
and most vibrant branch of Judaism.



UNION FOR
REFORM JUDAISM

האיחוד ליהדות רפורמית

SERVING REFORM CONGREGATIONS IN NORTH AMERICA

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