

MOVING TO THE LEADING EDGE: VOLUME 1

Principles that Drive Strong Congregations

A URJ Resource and Discussion Guide to Move Your Congregation Forward



Foreword

A lot of attention is paid these days to innovative start-ups in the Jewish world, and much of this attention is well-deserved. The energy and creativity being unleashed are both extraordinary and critical to the present and future of Jewish life in North America and, likely, worldwide. But too often, it is similarly assumed that because established institutions are, well, established, they are not innovating internally. Frankly, that's not the case.

At the Union for Reform Judaism (URJ), we spend our days engaging with congregational leaders representing the nearly 850 congregations of the URJ, and I can tell you that there is significant innovation happening in synagogues across North America. The conventional wisdom has shifted. No longer are congregations waiting for the conveyor belt to deliver them new members. They realize that existing solely to sustain their institutions is not a long-term prospect for growth or even for survival.

Instead, they now see that they must innovate, by transforming the way they create sacred community and meaningful Jewish experiences to have an impact on the participants and the world around them. More and more URJ congregations are experimenting, some of them on their own and some in partnership with other congregations. And it's happening in congregations of all sizes and demographic profiles, all over North America.

To achieve the innovation that needs to happen in congregations so they can continue to thrive, board members must be able to move beyond managing the day to day; they need to have generative conversations about the future of their congregation and increase the risk(s) that they are willing to take. This is why we publish *Moving to the Leading Edge*. We want to give congregational board members leading-edge ideas to wrestle with and discussion guides to help them navigate the process.

This edition of *Moving to the Leading Edge* comes in three separate volumes:

- **Principles that Drive Strong Congregations**
- **Leadership and Governance**
- **Engaging Congregants**

In this volume, we have collected articles and discussion guides related to the principles that drive strong congregations. Each of the eight principles has at least one article for you to read together and discuss. The articles in this resource have been written by URJ staff members, experts in the fields of leadership and congregational life, and leaders from URJ congregations who are doing innovative work.

We hope that these pieces will help you innovate and inspire sacred action at your congregation. After all, our ultimate goal of creating a world with wholeness, justice, and compassion can only be achieved with strong congregations.

Amy Asin

AAasin@URJ.org

Vice President for Strengthening Congregations, Union for Reform Judaism

Contributors

Editorial Team

Amy Asin, URJ Vice President for Strengthening Congregations
Daphne Macy, URJ Communications Manager, Strengthening Congregations
Helayne Friedland, URJ Production Manager
Jane Herman, URJ Senior Writer and Editor
Kate Bigam Kaput, URJ Digital Communications Manager
Michael Goldberg, URJ Director of Operations, Strengthening Congregations
Moriah Benjoseph Nassau, Associate, URJ Leadership Institute
Robin Riegelhaupt, URJ Manager of Strengthening Congregations Resources

Special Thanks

The articles in *Moving to the Leading Edge* have been written by URJ staff members, experts in the fields of leadership and congregational life, and congregational leaders who are doing innovative work. Bios for each of the writers can be found at the end of each article.

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David Goldman, Congregation Emanu-El, San Francisco, CA
Connell Saltzman, Temple Emanuel, Denver, CO
Max Schwimmer, Congregation Beth Israel, West Hartford, CT
Rabbi Lydia Medwin, The Temple, Atlanta, GA
Rabbi Peter Berg, The Temple, Atlanta, GA
Rabbi Asher Knight, Temple Beth El, Charlotte, NC (formerly of Temple Emanu-El, Dallas, TX)
Rabbi Andi Koren, Temple Emanuel, Greensboro, NC
Rabbi Nicole Auerbach, Central Synagogue, New York, NY
Aaron Nienshultz, Congregation Beth Or, Maple Glen, PA
Allison Levin, Congregation Beth Or, Maple Glen, PA
Rabbi David Gerber, Congregation Beth Or, Maple Glen, PA
Jillian Glick, Congregation Beth Or, Maple Glen, PA
Diana Einstein, Temple Emanu-El, Dallas, TX

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Photos

The photos used throughout this guide are courtesy of the URJ and the following contributors (in order of appearance): **Glenn Cohen**, Temple Shaari Emeth, Manalapan, NJ; **Sharon K. Benoff**, Shir Ami, Newtown, PA; **Howard Schneider**, Temple Beth El of Huntington, Huntington, NY; **Dale Lazar**, Temple Sinai, Pittsburgh, PA; **Ruthe Swern**, Temple Sinai Congregation of Toronto, Toronto, ON; **Frank Kohn**, Temple B'nai Shalom, Fairfax Station, VA; **Peter Ginsberg**, Garden City Jewish Center, Garden City, NY; **Marilyn Milne**, Temple Adat Shalom, Poway, CA; **Isti Bardos**, Temple Israel, Memphis, TN; **Phillip Katz**, Emanu-El Bne Jeshurun, Milwaukee, WI; **Skylar Cohen**, Congregation Beth Emek, Pleasanton, CA.

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Introduction

8 Principles that Drive Strong Congregations

by Amy Asin

All congregational leaders are looking for the magic formula to success, the one that will ensure that their members are happy, engaged, and Jewishly fulfilled, and that their budgets are balanced. Though there's no one-size-fits-all solution, there are a few tried-and-true organizational approaches to strengthening congregational life—and we at the Union for Reform Judaism are happy to share what we've learned by working with you through [Communities of Practice](#), [Leadership Institute](#) programs, and other engagement opportunities. Through this work, we've identified several themes that are vital to congregational success—and we've compiled a few of those not-so-secretive secrets here.

1. Start with why.

As leadership expert Simon Sinek [said in his TED Talk](#), we need to start with “Why?”—and the answer must be more than just a desire to sustain our organization or our community. Rather, it must articulate what we are trying to achieve within our community. Some congregations say their “why” is to repair the self and the world; others seek to build communities that “do justice, love mercy, and walk humbly with God” (Micah, 6:8). Identifying your why, also known as your mission, will help your congregation determine what to do and how to do it, going beyond doing what you've always done and beginning instead to understand what you're trying to achieve in your sacred community.

2. Be aware of the sacred.

No one person can be responsible for a congregation's success; it takes the talent and dedication of a team of people working together. Leading a congregation differs from leading a corporation, small business, or even other types of non-profits. Because our congregations are sacred communities, our work is heightened and our mission takes on increased importance. Because our leaders sit in pews next to one another, and our clergy may officiate at lay leaders' weddings or visit them in their hospital beds, our relationships are much more intimate and complex than even those at other Jewish organizations.

3. Focus on best principles, not best practices.

Everyone wants an easy answer—“Tell me what to do, and I'll do it!”—but given congregations' varied histories, cultures, demographics, physical spaces, and resources, no one solution will work for every community, and given the complex challenges presented by a rapidly changing world, simple plug-in solutions are unlikely to work for long. Instead, we work with “best principles” not “best practices.” Different congregations may implement a best principle in different ways. One example is the practice of giving a *d'var Torah* at board and committee meetings: The best principle is to bring the sacred to our deliberations, but many different practices can achieve this principle. Some congregations hold text study at their meetings; others ask board members to share stories about their Jewish identity; still others start with a blessing on the bimah and then move into another space for the meeting itself. Each one of these practices can bring Jewish text or ritual to leaders' deliberations, and all illustrate the best principle of seeing leadership as a sacred task.

4. Experiment.

Figuring out how to apply a best principle in your congregation will require you to try out a few different approaches to find a practice that works for you. For example, in the case of bringing the sacred to board

meetings, you may try four different approaches in four different meetings and then discuss with the board which worked best. In an environment with unknown solutions and rapidly changing requirements, encouraging a culture of experimentation is critical to congregational success.

5. Bring participants into the process.

When experimenting, involve participants in the process. A discipline called “design thinking” is being applied to Jewish life and provides tools for incorporating the needs of participants into the design process. Co-creation in program areas such as social events, social action initiatives, education, and worship leads to greater ownership on the part of participants—which leads to greater involvement and a greater likelihood of achieving your mission.

6. Redefine success.

Many congregations seek to deepen congregants’ engagement—supporting relationship development, creating meaningful experiences, and having an impact on their lives, which in turn enables them to achieve their mission and have an effect on the world—all through the lens of Jewish tradition. Nonetheless, many congregations still define success by how many people attend, how well they stick to the budget, and how many attendees complain afterward (or not). If we want our congregations to be places of deep relationship, impact, and meaning, we must constantly explore and discuss new measures of success.

7. Decide what to stop doing.

Congregational leaders commonly ask what new programs or initiatives they should add as a means of attracting new members or responding to current realities. While it is a harder question to answer, it is equally critical to ask: “What should we *stop* doing?” Not only is it unsustainable to layer more work upon overburdened clergy, staff, or volunteers—but by narrowing your focus, you will make your new initiatives more central and more likely to succeed. In order to decide what to stop doing, [use consistent criteria](#) to evaluate your existing programs and establish a transparent process to share your decisions.

8. Manage the transition, not just the change.

William Bridges, the father of transition management, spoke about transition as the human side of change, the psychological process of adapting to change. Congregations often make changes that make sense strategically, make sense from a resource perspective, and may even make sense from a congregant perspective. But if they ignore the human side of change, they are often left wondering why there is so much resistance to a seemingly logical transition. Many congregations are applying Bridges’ principles to major staff transitions, and we are starting to see these principles applied in programmatic changes as well. As a result, congregants who have a more difficult time with the transition feel like they are being heard, and the entire community better embraces the transition.

We at the URJ look forward to working with you to apply these concepts to strengthen your congregation, ensuring that your community thrives now and for the next generations.

Additional Resources:

1. “The Future of Reform Judaism: How Can We Lead in Challenging Times?” by Marty Linsky, URJ’s *Inside Leadership* blog
2. On design thinking (principle 5):
 - a. “Design Thinking: A Praxis for Creating User-Centered Experiences,” *eJewish Philanthropy*
 - b. “Jewish Teens in Boston Embrace Design Thinking,” *eJewish Philanthropy*
3. On redefining success (principle 6): “Using New Measures to Change the Conversation about Success (and Your Congregation),” *NATA Journal* XLIX, no. 1 (winter 2014): 4–7.

Discussion Guide:

1. After reading this piece, discuss:
 - What are some of the major priorities for your congregation?
 - Which principles could help you in addressing some of your major priorities?
2. In advance, prepare the following:
 - Take an 8.5"x11" paper.
 - Draw eight lines on it, and label each line to indicate one of the eight principles.
 - Label the left side of each line "Needs a lot of work," and label the right side of each line "We have mastered this."
 - Repeat the steps above on a sheet from a Post-it® easel pad.
 - Make copies of the 8.5"x11" page, according to the number of people attending your board meeting.
3. At the meeting, give each participant a pen and a copy of the sheet you prepared in advance.
4. Ask each participant to mark the spot on the line that best represents where they think the congregation is for each of the eight principles.
5. Place the sheet from the Post-it easel pad in the front of the room.
6. Ask each person to mark each line in the same place they marked their paper.
7. Now look at the data:
 - Which principles have the most/least consensus? This might be because:
 - Some parts of the congregation are further ahead than others
 - A participant isn't informed about some things that are happening
 - People in different parts of the congregation have different priorities
 - Different leaders have different strengths, making it easier for them to make progress on certain dimensions
 - Which principles are strongest/weakest?
 - What can you learn about the areas that are further behind from those that are further ahead?
 - How can you make progress in the areas where you are weakest?
 - What needs to be shared with all leaders in order to bring them more deeply into the conversation? How do we do that?

Amy Asin is the URJ's vice president for Strengthening Congregations.



Start with Why

Want Your Congregation to Be Strong and Effective? Start with Why

by Amy Asin

Today, more than ever, congregations that wish to remain relevant and effective centers of Jewish living must articulate their “why”—the reason they exist and the reason people should invest time and energy in them. Unlike in past generations, when regular deliveries of congregants and funding driven by a sense of obligation were the norm, congregations today need to express in their why exactly what the community has set out to achieve—and what that means for congregants and prospective congregants.

When congregations lose track of their why (often incorporated in a mission statement), they tend to focus only on surviving. Perhaps worst of all, they frequently use membership and money—metrics focused on survival—as the sole measure of success. Revisiting and reassessing their why gives congregations an opportunity to use it as a measure of success *and* to make membership compelling to congregants and potential congregants.

As part of the [URJ Scheidt Seminar for Congregational Presidents and Presidents-Elect](#), we have been studying mission statements for several years; a clear majority fall into one of two categories.

1. Congregations that “exist for the sake of existing” often have mission statements that indicate that they “serve the Jews of the Springfield Valley”—in this case, a hypothetical place—“offering them a place to practice Judaism and be in Jewish community.”
2. Congregations that “exist to provide programming” often have mission statements that indicate that they “serve members by offering religious education, worship, community, and social justice opportunities.”

Unfortunately, in today’s world, neither type of statement is sufficient.

Let’s return to the hypothetical Springfield Valley to see why.

As the region’s Jews age and fade from active communal involvement, many in the up-and-coming generation question why Springfield needs a congregation at all. In today’s pluralistic, universalistic world, young people are less likely to value communal life built on a particularistic base or believe that Jewish education is necessary to be a good person. Congregations whose why focuses on providing Jewish community, programming, and education, therefore, will not resonate with these individuals or families.

Congregational life needs a new why, and it is up to synagogue leaders to adjust and refocus their communities’ existing why so congregations can grow and thrive.

Indeed, new mission statements—inspired by the formula offered by [Simon Sinek in his TED Talk](#)—are starting to appear. Because their words—and the actions that follow—start with why, they resonate with today’s Jews, compelling them to become part of the Jewish community. When taken seriously, such mission statements have tremendous power to transform Jewish life. And they are deeply rooted in our tradition.

Imagine, for example, the potential in your community if prospective congregants heard words and saw supporting actions like these offered by the hypothetical Congregation Beit Torah in Springfield:

Congregation Beit Torah offers a community in which to aspire to *tikkun ha-nefesh* (repair of the self) and *tikkun ha-olam* (repair of the world).

In the rapidly changing, dizzying world here in the Springfield Valley, sometimes it's hard to find an anchor or know where to invest ourselves. At Congregation Beit Torah, we seek to help you find meaning in this world so you can be the best version of yourself possible, using the wisdom of our past to help you make sense of your present and prepare you and your family for the future. We offer you a place to bring your mourning and pain, and a community in which to celebrate your greatest joys. We work with you to find a meaningful role in the ongoing project to repair the world, ensuring that more people can live lives of wholeness, justice, and compassion. How do we do this? We help you find your place—the part of Jewish life that resonates most for you. We believe that Torah, *avodah* (prayer), and *g'milut chasadim* (deeds of lovingkindness) offer effective pathways to the solace and support you seek for yourself and the agency you hope to have to make the world a better place. Please join us on this journey, enriching our lives as we seek to enrich yours.

By starting with a why that truly matters to congregants and prospective congregants and is deeply rooted in our heritage as Reform Jews, today's congregations—whether the hypothetical Congregation Beit Torah or your own synagogue community—can put themselves on a path to strength and success.

Additional Resources:

1. [“8 Principles that Drive Strong Congregations,”](#) by Amy Asin
2. [“How Great Leaders Inspire Action,”](#) by Simon Sinek, TED Talk
3. [“Lessons from Camp Newman about Your Congregation’s Why,”](#) by Amy Asin, URJ’s *Inside Leadership* blog

Discussion Guide:

1. Think about your congregation and what it does over the course of a week or a month. List three typical events.
 - What is the purpose of these events beyond providing the service that they offer? For example, if religious school is on your list—Why do you have religious school? What is the purpose to the congregation and to the participants?
 - How does thinking about the purpose of these events help inform your thinking about the purpose of your congregation?
2. Take a look at the sample “why” statement that is included in the article. What are the similarities and what are the differences between your congregation’s mission statement and the “why” statement in the article?
3. If you want to expand your conversation, invite at least a dozen congregants for individual conversations prior to your leadership meeting. Ask them to describe a meaningful connection they have with the congregation or a meaningful experience that they have had in the congregation in the past six months. Share the answers at your leadership meeting, and look for patterns.
 - What do the responses you received tell you about what your current congregants value about your congregation?
 - What does this tell you about your purpose?

Amy Asin is the URJ’s vice president for Strengthening Congregations.



Start with Why

Congregational Perspective

The How To's of Starting with Why

by Sharon K. Benoff

In spring 2018, at a board meeting of my congregation, [Shir Ami](#) in Newtown, PA, I posed this question: “Why Shir Ami?” My fellow board members offered responses that were underwhelming: community, my child’s bar mitzvah, life cycle events, and the like.

I realized if we were going to get to the heart of the question—Why does our congregation exist?—I would need to rephrase the question.

My impetus for asking the question in the first place stems from a session I attended at the [URJ Scheidt Seminar for Presidents and Presidents-Elect](#), in which URJ Vice President for Strengthening Congregations, Amy Asin, brought to life and applied to congregations the concept of “[Start with Why](#),” popularized by [Simon Sinek](#).

I returned home with a new understanding of the importance of having a clear why: If we, the board of directors, could not answer to this question articulately, how could we expect to engage our congregants and keep them engaged for many years? How could we ask them to give of their time, energy, or financial resources? Finally, how could we recruit new members if we did not understand our own connections?

I quickly rephrased: Why did you join Shir Ami? Why do you remain a member? What could Shir Ami do better?

Again, silence filled the room at first, but once the questions had sunk in, I could feel the emotion as people began to speak from their hearts. Marker in hand, I jotted down the responses on the blank easel pad, all of which provided an initial answer to the question.

These answers were just the beginning of the process, as the responses I received from our 15 board members were not entirely representative of the larger 650-family congregation. Therefore, following the board meeting, I invited a broader array of congregational stakeholders—committee chairs, volunteers, and professional staff—to a meeting dedicated to finding our collective “why.”

What did we find?

We discovered people want to feel a sense of belonging, they want to be engaged in something larger than themselves and their immediate families, and they are looking for a vehicle for giving back. We found people want to feel connected to and embraced by others. We discovered congregants want to have deep conversations and moments of divine spirituality. Finally, we realized that over the course of their membership, people may connect to different aspects of the congregation’s why.

This exercise was important not only for our congregation, but also for guiding and shaping my presidency. By the time we finished synthesizing all the information we had collected, I realized the board of directors could not make truly informed decisions without listening to the many voices within the congregation. I learned the value of seeking out and asking our many stakeholders and members to share their opinions, and that asking and answering the “big questions” helps keep people engaged, excited, and inspired. I learned, too, that as a congregation, we need to ask questions differently, interact in new ways, and explore non-traditional paths to enrich congregants’ experiences.

We extended this deep, self-reflective assessment into the governance of our congregation by aligning the structure of our board and its role with its purpose. We rewrote our constitution and restructured our entire board. We have initiated finite term limits and moved from 40 board members, who comprised an executive and general board, to one congregational board of 15 members.

As a result, our board is more efficient, effective, and strategic. We no longer manage the day-to-day operations of the congregation, leaving that to our staff. Instead, we set policy, develop long-term goals, and challenge ourselves by continually confronting the big questions.

What about our new why statement?

It was not easy to achieve and remains a work in progress. Our congregants will see themselves in it differently—and their connections to it may change over time. What's more, as the external environment changes, we may need to challenge the why of our congregation again. In the meantime, our current statement guides the discussions and decisions we are making *now*.

How do you answer the difficult question of “why” your congregation? And how do those answers assist you in making decisions? Start by asking: Why do you belong to your congregation? Why is it important to you to belong? Why is it important to our Reform Movement? Why?

Sharon K. Benoff is the president of Shir Ami in Newtown, PA. She serves on the URJ North American Board, as a URJ board workshop facilitator, and as the lay partner of the URJ Congregational Innovation team.



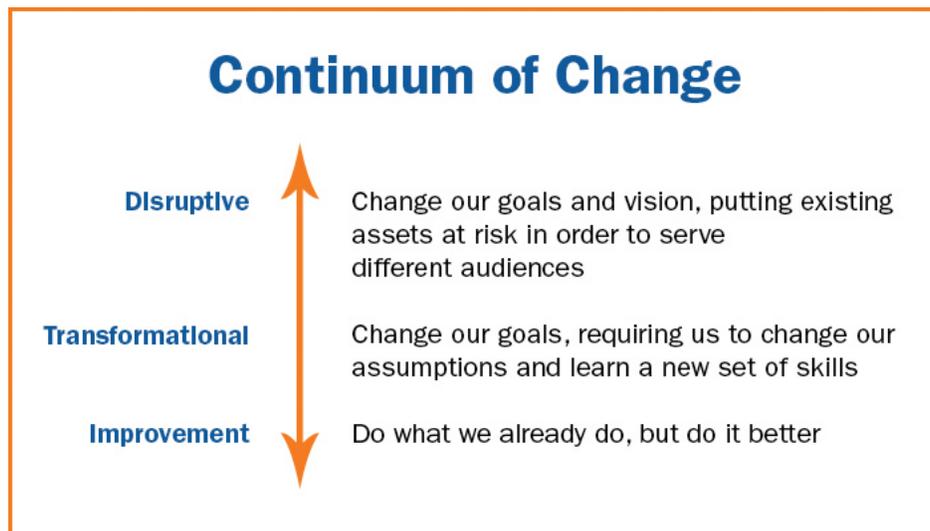
Start with Why

How Your Congregation Can Move Up the Change Continuum

by Amy Asin

It is universally acknowledged that the world around us is changing faster than ever. To stay relevant and thrive in this new world, change will be necessary in all congregations, even those that are doing well. The pace of change in the outside world demands it. Many congregational leaders are willing to change, but in most congregations, we see either disagreement or a lack of understanding about the depth of change required.

This continuum of change framework, adapted from [the work of Dr. Robert Marshak](#), may be helpful as congregations grapple with issues surrounding change:



Most conversations in congregational life live at the bottom of this chart. How can we better do what we already do? How can we add something to what we already do to enhance it?

For much of what congregations do, we need to move into the realm of transformational, if not disruptive, change. The principle that we have to “[start with why](#)” drives us to re-examine our goals in light of existing conditions, which, in turn, likely will drive us to conclude that transformational change, minimally, is necessary for most congregations.

What we don’t know yet is whether it will be enough.

Transformational change, brought about by a change in goals, can get us to be the very best congregation we can be. Disruptive change allows us to compete in a world in which the current value proposition of congregations is not clear. To be relevant to new people in our communities, we may need to move to more disruptive change.

For example, [Temple Sinai Congregation](#) in Toronto, ON, [recently re-envisioned its Tot Shabbat program](#). Their leadership describes a process in which they first considered improvements or technical changes—basically doing the same thing they'd been doing, but a little bit differently. Examining childhood development led them to change the prayer space and to keep the music in the service the same, rather than mixing it up. They could have stopped there and would have ended up with a similar Tot Shabbat service in the social hall instead of the sanctuary.

It was when they changed their goals and moved toward transformational change that they saw the real payoff. [Rabbi Daniel Mikelberg and Cantor Katie Oringel](#) write:

We also revisited the goal of Tot Shabbat. In the past, we intended for children to gain synagogue skills so they would be comfortable praying as adults. We now aspire to engage the youngsters in prayer as the rambunctious, curious Jews they are today.

Restating the *why* of Tot Shabbat allowed them to change the schedule, the activities, and ultimately, the outcomes, making extraordinary progress toward their goal. As a result, they now engage more current congregants and attract many others who would not have come to a congregation in the past. Their willingness to change their goal from preparing children to be participating adults—which reduces the goal of Tot Shabbat to continuity of the synagogue for continuity's sake—to creating an excellent experience for children *today* led the leaders to a new status quo.

The next step for this congregation, should they decide to take it, would be to consider an even deeper change that moves toward disruption.

Such a change would shift the vision—and allocated resources—from providing programming to families within the congregation to serving families in the community as a whole. This change could be accomplished by moving Tot Shabbat out of the social hall and into local parks or people's homes. Eventually, however, the congregation will need a different economic model to fund a program that serves families who aren't paying dues.

By not relying on the asset of their building (which is likely a deterrent for many people) and by removing the barrier of membership, they could potentially reach an entire new audience of families with young children. [North Shore Congregation Israel](#) in Glencoe, IL met with success when [it made this type of disruptive change](#).

Although the prospect of transformational change—let alone disruptive change—is daunting to us as leaders, it's important to consider the outcomes for our congregations when there is no change. As former U.S. Secretary of Veterans Affairs General Eric Shinseki put it: "If you don't like change, you are going to like irrelevance even less."

Additional Resources:

1. [Organizational Change: Views from the Edge](#), by Robert Marshak
2. "5 Factors that Determine Your Congregation's Readiness for Change," Rabbi Esther Lederman, URJ's *Inside Leadership* blog
3. For an example of transformational change: "[Creating Successful Tot Shabbats: How We Did It](#)," by Rabbi Daniel Mikelberg and Cantor Katie Oringel, URJ's *Inside Leadership* blog
4. For an example of disruptive change: "[Why We Closed Our Synagogue's Preschool and Started Over from Scratch](#)," by Rachel Stein, URJ's *Inside Leadership* blog

Discussion Guide:

1. Where on the continuum do you think your congregation is right now? Are there particular parts of the congregation that are in different places? Is this the same as it was 5-10 years ago?
2. How much change do you think your community is prepared for now? Is it possible to move up the continuum?
3. What leadership skills and resources would you need in order to be able to take on more change? How can you develop these?

Amy Asin is the URJ's vice president for Strengthening Congregations.



Be Aware of the Sacred

Strong Congregational Leadership

Requires Sacred Partnerships

by Lisa Lieberman Barzilai, RJE

“When people sit together and there are words of Torah between them, the Shechinah (divine presence) dwells among them.” (Pirkei Avot 3:2)

In Jewish communities, there is little that you do as an individual. This is certainly true for those of us who are leaders.

A sense of community, belonging, and mutual support are culturally engrained in us as Jewish people. We pray in a minyan, and we are expected to provide for those less fortunate and to rejoice with the bride and groom. This communal network is especially important for those of us who are in leadership roles.

Moses’ father-in-law, Jethro, tells him that leading the people without support from others is nearly impossible—and it’s also a poor leadership model. He encourages Moses to find partners who will help him adjudicate disagreements among the Israelites. Even the Divine expects mortals to assist in leading the Jewish people: The ancient prophets shared the words of God to help the Israelites see the error of their ways, as well as to demonstrate how to create a world of wholeness, justice, and compassion.

Our lives and work depend on partnerships. In Jewish communities, these partnerships can be among volunteers, paid professionals, or lay and professional leaders. Unfortunately, too often these relationships are fraught with a lack of respect, despite the fact that everyone involved is performing holy work. These partnerships create a stronger and more vital endeavor. They are sacred and should be treated as such.

Sacred partnerships recognize each of us as individuals working toward shared goals.

The Talmud, a core text of our people, contains the teachings, opinions, and decisions of thousands of rabbis across centuries. Throughout these “conversations,” the sages of our past express respect and admiration for all, both those with whom they agree and those with differing opinions.

Being in a sacred partnership means that we acknowledge our differences, just like the leaders of past generations did. At the same time, it means that we focus on our pledge and responsibility to the shared goals and common good of our congregation. Each leader may approach their work in a different way. It’s important to embrace these variations and understand that seeking common ground will improve overall decisions and outcomes. This also will enrich relationships among leaders with different inclinations, as they will each have the freedom to undertake endeavors from their own perspectives.

Sacred partnerships require trust and clear lines of communication.

Respect, trust, honesty, listening and communication, transparency, confidentiality, flexibility, and reflection are the tools we use to build and nurture sacred partnerships. They all require a willingness from each person to be vulnerable toward others. Without these essential and interconnected components, fissures are likely to develop in the relationship. After all, how can leaders demonstrate respect if there is no trust or honesty in their relationships with others? It’s imperative that leaders be able to hear what others say, work to find common ground based on shared goals, and act to bring about an organization’s shared vision.

Sacred partnerships are built upon Jewish values.

The kabbalistic notion of *tikkun olam* reminds us that each person has a spark of the Divine within and that it is our responsibility to heal the world. As Jewish leaders, what sets us apart from our counterparts in the secular world is that the goal of the partnerships we cultivate is to create a better world and to expand this notion of *tikkun olam* beyond what one individual can achieve. Although it is true that partnerships in the secular world also are intended to bring about mutual goals, these goals are neither holy nor sacred.

No matter what type of leader you are—experienced or emerging, lay or professional—the people around you are more than colleagues and collaborators. They are your sacred partners, and in relationship with them, you will be able to inspire sacred action in your community.

Additional Resources:

1. “8 Principles that Drive Strong Congregations,” by Amy Asin
2. [URJ Sacred Partnership Resource and Discussion Guide](#)
3. “Why Leaders Shouldn’t Aspire to Run Their Congregations Like Businesses,” by Amy Asin, *eJewish Philanthropy*

Discussion Guide:

1. With whom are you in a sacred partnership? Think broadly about all of those with whom you work to achieve your congregational goals.
2. What actions have you taken to cultivate and maintain your sacred partnerships? (Setting up meetings with your congregational partner, meeting outside of work, scheduling regular phone calls, etc.)
3. How can you leverage the differences between you and your congregational partners to build strong relationships?
4. What is similar in congregational partnerships to other working relationships? What is unique?
5. In what ways do your sacred partnerships allow you to create a world of wholeness, compassion, and justice?
6. Think about one sacred partnership in which you are engaged. What is one commitment you will make to strengthen that relationship?

Lisa Lieberman Barzilai, RJE, is the director of the URJ Leadership Institute.



Be Aware of the Sacred

How to Cultivate Sacred Partnerships Among Your Leaders

by Lisa Lieberman Barzilai, RJE

Successful Jewish leaders know the importance of working as a team: A congregation can truly thrive only when there are deep relationships among its lay and professional leaders. In congregations, these relationships—between two lay leaders, two professionals, or a lay leader and a professional—carry a unique element of holiness. They are sacred partnerships.

We define sacred partnership this way:

When two people sit together and there are words of Torah between them, the *Shechinah* (Divine Presence) dwells among them. (*Pirkei Avot* 3:2)

A sacred partnership is a commitment to building and nurturing relationships that elevate the work of leadership to a level of holiness. Sacred partnerships recognize each of us as individuals and our desire to inspire sacred action in our communities.

Sacred partnerships are built and nurtured through the Jewish values of mutual respect, trust, honesty, listening and communication, transparency, confidentiality, flexibility, reflection, empathy, and vulnerability.

On the surface this definition may appear as a series of simple words, but sacred partnerships don't *just happen*. These critical relationships with other leaders in your congregation must be *built*—with intentionality, attention, and constant care. Realizing them requires a true commitment to the Jewish values in the definition, as well as continual nurturing. Although cultivating sacred partnerships may not be easy, doing so is critical to the health of your congregation and is one of the eight principles that drive strong congregations.

You may wonder: How can I create the foundation for such relationships and continue developing them?

To answer this complex question, the URJ created the [Sacred Partnership Resource and Discussion Guide](#) to help you develop, explore, and deepen sacred partnerships within your congregation. Although it is an ongoing process, here are four tips to get you started:

1. Schedule regular meetings.

Fostering and cultivating a sacred partnership requires frequent conversations. Be intentional about setting weekly, biweekly, or monthly meetings to ensure the time, place, and space to connect. Consider following the example of [Congregation Or Ami](#) in Calabasas, CA, which calls them “sacred partnership meetings.” This language can remind you what needs to be at the core of every conversation.

2. Get to know one another.

Jewish tradition teaches that all of us are created *b'tzelem Elohim*, in the image of God. With that idea in mind, each leader in your congregation brings unique skills and talents to the work at hand. Matching people's passions, skills, and talents with congregational needs or goals promotes success. To understand your sacred partners and leverage the unique gifts they bring to the table, you should spend time getting to know one another. Take time to ask important questions such as:

- What keeps you up at night?
- What gets you up in the morning?

- What are your life goals?
- How can I help you succeed?

3. Use sacred texts to connect.

Judaism is blessed with rich sacred texts from the Bible to modern commentaries. Studying these texts with your sacred partners will bring you closer to one another and to the Divine.

Discussing sacred words and sharing how texts resonate—or don't—can help promote understanding and build deeper relationships between sacred partners. It also can offer insights into your world view that might not otherwise come up in conversation.

4. Engage with the URJ Sacred Partnership Resource.

There are many ways to explore, build, and nurture sacred partnerships. We encourage you to look at the various exercises found within the URJ Sacred Partnership Resource and Discussion Guide. From text study to self-evaluation, this resource can provide individuals and groups within your congregation with a clear framework to study both the concept and nature of sacred partnerships.

Sacred partnerships require a willingness to embrace your strengths and admit where you, individually and collectively, need to grow and improve. It is only by continually nurturing and deepening these connections that your congregation can develop resilient leaders—who will help your community stay strong and vibrant.

Additional Resources:

1. [URJ Sacred Partnership Resource and Discussion Guide](#)
2. “[Do You Work Here?: Volunteers as Consultants and Facilitators](#),” by Gila Hadani Ward, URJ’s *Inside Leadership* blog

Discussion Guide:

1. Of the four ideas mentioned, which are you already doing in a significant way? Share specific examples that illustrate how you are implementing these ideas.
2. Which of these four ideas are most difficult for you? Why?
3. With whom would you like to build or deepen a sacred partnership, and why? What first steps might you take to make this happen?
4. Ask the group to divide into pairs, choosing a partner they don’t know as well:
 - The pairs should spend 15 minutes asking each other the questions in the “Get to know one another” section of the article.
 - Come back together as a group and ask a few people to reflect: What did you learn about your partner? What surprised or inspired you about what you learned?
 - Ask the pairs to set a time to connect again to continue getting to know one another.
5. *Optional 30-minute activity:* As a board, complete the “Congregational Board Reflection” activity found on pages 15-25 of the URJ Sacred Partnership Resource. After completing the activity, determine one area in which you might want to make improvements and next steps to work toward that goal.

Lisa Lieberman Barzilai, RJE, is the director of the URJ Leadership Institute.



Be Aware of the Sacred

Congregational Perspective

How the Language of Sacred Partnership Helps Build Trust

by Rabbi Marci Bellows

Whenever we undergo a major life change—getting married, having a child, moving, or starting a new job, for example—we can feel overwhelmed with all there is to learn, adapt to, and incorporate into our lives.

In fall 2016, I experienced three such changes all at once: having a baby, moving to a new community, and starting a new rabbinical position at [Congregation Beth Shalom Rodfe Zedek](#) (CBSRZ), a century-old, 230-member community in Chester, CT. Together, my husband and I embarked on the sacred journey of parenthood and creating a Jewish home. Similarly, several trusted leaders in our new congregation welcomed us and helped us to feel at home. In each transition, the support of a trusted partner made all the difference.

Jewish professionals and lay leaders are responsible for so much of what makes the synagogue community important and special. From representing millennia of our faith tradition and teaching it to many generations to celebrating and comforting each other through the ups and downs of life, our work can feel overwhelming, especially if we think we are in it alone. But, as with other life scenarios, the work is much sweeter when we recognize we have true partners by our side.

Early on, CBSRZ's leaders told me that Maxine Klein, the congregation's new president, and I would attend the [URJ Shallat Rabbinic Transition Program](#) in December 2016. This program convenes pairs of presidents and new senior/solo rabbis during their first winter together to strengthen their developing partnership. I was thrilled that the congregation values learning and growth enough to send us to the conference—and I had a few questions. Why was a seminar about transition scheduled a full six months into the transition itself? And how would the program affect my evolving relationship with the president?

From the onset, Maxine and I arranged to meet weekly. This schedule helped us get to know each other and to strive to be on the same page. I quickly found myself quite comfortable with her, and developed a clear sense of trust. Our partnership was beginning. Knowing we would attend the Shallat Program together six months into our work together gave us time to lay the groundwork for our relationship, and, thus, to reach a new level of communication and understanding during the extended retreat.

The Shallat Program focused on two areas: rabbinic transition and sacred partnership. We learned that the job *change* reflected one moment in time, but the rabbinic *transition* embodies an ongoing process for the entire community. Part of what helps the community along the path of transition in its own time is a solid, sacred partnership between the rabbi and the president.

Until the retreat, I hadn't thoughtfully considered the implications of the term "sacred partnership," and quickly realized it would be unlike any other professional relationship because our joint effort would include a covenant based on Jewish values. The covenantal facet of the relationship illuminates what an ideal partnership between the rabbi and the president could encompass, and explicitly names how collaborative and cooperative it could be. Sacred partnership fittingly describes the relationship Maxine and I would seek to achieve in our work together.

Our facilitators highlighted seven areas upon which sacred partnerships are built:

1. Mutual respect
2. Trust
3. Honesty
4. Listening and Communication
5. Transparency
6. Confidentiality
7. Reflection*

Trust seems to be the most fundamental of these values. Indeed, if we professional and lay leaders can trust one another, and trust we always have the best interests of the community in mind, everything else will fall into place easily.

Using the language of sacred partnership has brought holiness, enjoyment, and shared purpose into our work—as well as lots of fun, a result of the bonding we did during our time away together. God, too, dwells in the sacred partnership between Maxine and me, and we enjoy bringing this language and approach to our board and committees. Doing so helps us raise the level of discourse and distinguish the work of the synagogue from other mundane tasks. I look forward to creating and nurturing other sacred partnerships as I continue my rabbinic journey.

**Since this piece was originally written, the definition of sacred partnership has evolved and now also includes the values of empathy and vulnerability.*

Rabbi Marci Bellows is the spiritual leader at Congregation Beth Shalom Rodfe Zedek in Chester, CT.



Focus on Best Principles

Look for Best Principles, Not Best Practices

by Amy Asin

Everyone wants an easy answer: “Tell us what to do, and we’ll do it!” synagogue leaders often plead—but given congregations’ varied histories, cultures, demographics, physical spaces, and resources, no single solution will work for every community. Even if it did, given the complex challenges presented by a fast-moving and rapidly changing world, a simple plug-in solution is unlikely to work for long.

Instead of trying to replicate best practices that seemed to work for another community, congregations should seek best principles to guide them in the work specific to their community’s needs. This shift from seeking practices to seeking principles is one of eight principles that drive strong congregations.

But what does this mean?

A best principle is a broad concept that, based on trends in the field, generally leads congregations to success. Best principles can and should be manifested in diverse ways, depending on each congregation’s individual needs, resources, and culture. A best practice represents the unique way a specific congregation successfully implements a certain principle.

To clarify this distinction, let’s look at a specific best principle: bringing the sacred to congregational deliberations. You might immediately think of the common congregational practice of giving a *d’var Torah* at a board or committee meeting, but many different practices can achieve this principle. Some congregations hold text study during their meetings; others ask board members to share stories about their Jewish identity; still others start with a blessing on the bimah and then move into another space for the meeting itself. Each one of these practices can bring Jewish text or ritual to leaders’ deliberations, and they all illustrate the same best principle of bringing the sacred into the work of congregational leadership.

Here’s another example that stems from a best principle of religious education: involving parents in their children’s Jewish education. Different congregations will use different practices to achieve these principles: Some use a model of family education in which parents join children for learning every week; others have intermittent family programming within a more traditional drop-off model. In each case, congregations have chosen the best way for them to include parents in their kids’ education.

Now that these two terms have been defined, how can your congregation use them?

1. Uncover a best principle from another congregation’s best practice. Using the principle, figure out what practice is right for your community.

When connecting with leaders from other congregations, whether at the [URJ Biennial](#) or in discussion groups in [The Tent](#), you’ll learn about what’s working well for these congregations. If you try to implement the exact same things in your own congregation, though, you might find that they don’t work for you. At times, you’ll even know immediately and intuitively that these practices won’t work in your congregation. Maybe a different congregation hosted an outdoor event at a time of year when you can’t be outside. Maybe another congregation’s best practice requires a unique set of skills. In any case, by examining the other congregation’s success and asking why it was successful, you can begin to uncover principles and then find the practice that works for you.

For example, you might hear that a different congregation has significantly increased engagement of families with young children by holding free story time sessions at a local bookstore, led by a rabbi. The way to learn from this experience is not necessarily to replicate this exact practice, but rather to seek the principles at play by asking why it worked in the other congregation.

2. Identify your practice from a given best principle.

When you are experimenting with ways to innovate in a certain facet of congregational life, you will be working on an opposite process—you will start with a given best principle and establish new best practices. For example, you might be experimenting with a new way to greet congregants at services. You know that the best principle is to hospitably acknowledge the presence of every person who is there. Turning to the person next to you to say, “*Shabbat shalom!*” might be getting old. If you stick to the best principle of acknowledging every person and continue experimenting, eventually you will get to a practice that works for you.

To date, the URJ has published guides that include best principles for [engaging families with young children](#), [engaging young adults](#), [reimagining financial support](#), [congregational governance](#), and more. As you experiment and innovate, we hope to learn from you about why you have been successful so that together, we can discover new best principles that help congregations stay strong, relevant, and innovative.

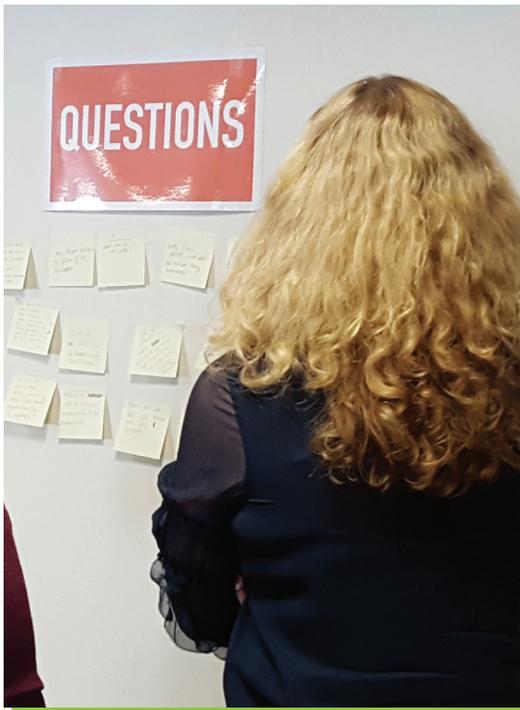
Additional Resources:

1. [“8 Principles that Drive Strong Congregations,”](#) by Amy Asin
2. [Engaging Families with Young Children](#)—URJ resource
3. [Paving the Road for Meaningful Young Adult Engagement](#)—URJ resource
4. [Reimagining Financial Support](#)—URJ resource

Discussion Guide:

1. Imagine you are at a URJ conference and someone asks you what your congregation does well. Think about an example that you would share with them. Now imagine that their response is that their congregation could never do that. How could you explain what you did and why you did it in a way that would help them see that they could implement the same best principle differently at their congregation?
2. As a group, brainstorm and identify areas of congregational life where you are interested in knowing what the best principles are.
 - Take a look at the [Leadership and Governance volume](#) and at the [Engaging Congregants volume](#) of this edition of *Moving to the Leading Edge* to see if there is an article that describes best principles for each area.
 - For each area, select one of the principles listed in the article that you chose. As a thought exercise, discuss three to four different small pilots you could run that would all use this principle, each through a different practice. Of the ideas mentioned, which are you already doing in a significant way? Share specific examples that illustrate how you are implementing these ideas.

Amy Asin is the URJ’s vice president for Strengthening Congregations.



Experiment

Creating a Culture of Experimentation in Your Congregation

by Rabbi Esther Lederman

One of eight principles the URJ has articulated for driving strong congregations is experimentation. That may seem like an oxymoron: A synagogue—steeped in thousands of years of tradition experimenting? But if we've learned anything from the trajectory of Jewish history, it's that we are an adaptive people. From the paradigm shift after the destruction of the Second Temple to the birth of the State of Israel and the growing richness of the North American Jewish community, ours is an inventive tradition.

Why do congregations need to experiment? Professor Marty Linsky of the Kennedy School of Government at Harvard University argues that our world is changing so quickly that we're encountering problems we've never faced before—and so the solutions are no longer obvious.

You might be able to imagine the ways changes in the world have had an impact on congregations—from social media, to the new way millennials operate in the world, to increasing lifespans, to new family structures. Experiments help us figure out the best way to move forward and ease the pressure to have *the* answer or to be the problem-solver.

What are some of the advantages of conducting experiments in your congregation?

1. Labeling a new initiative an “experiment” or “pilot” can lessen resistance to trying something new.

While some congregational leaders are eager to experiment, others might be resistant to or concerned about change. When you use the language of experimentation—when you say that you are simply “testing an idea,” “piloting,” or “experimenting”—you can minimize this resistance and potentially get buy-in. Calling an initiative experimental implies that you're trying something just for the moment, rather than making a permanent change to your congregation's program or culture.

This concept can be illustrated by an example that many congregations have experienced: The educator wants to try something new in the religious school and needs board approval to do it. Calling the educator's new initiative an experiment or a pilot is often the reason it gets supported instead of being shut down.

2. Using the language of experimentation can reduce the fear of failure.

Experiments, if run properly, provide you with data. Sometimes that data will be that the idea that you introduced didn't work in your congregation. This isn't a failure, though, because the goal of an experiment is to try out a new idea and learn from it. The data you receive—even if the new idea didn't work in your congregation—provides the opportunity for learning. Ask yourself: Why didn't it work? How will you take this knowledge and apply it to your next experiment?

3. Because experiments are smaller-scale than complete changes, congregations can often run more than one experiment at the same time.

Conducting several experiments simultaneously provides congregations with the opportunity to test out multiple approaches to a single area of congregational life and to receive multiple data points at the same time.

This approach results in efficiency and means that congregations can truly see which approach is most successful for their community. For example, many religious schools that want to try something new in the field

of religious education will run different experiments; they may run a traditional Sunday school model while also running a family education model. Or they might have some kids learn Hebrew in the classroom and some do it via Skype. In the area of small group engagement, congregations will run multiple types of small groups—from a Mussar group to a biking group to a new parents group—to see which ones seem to be the most successful.

4. Congregations can make mid-course corrections to their experiments.

When deciding to do something new, certain leadership teams may execute the new idea without ever evaluating how or whether it is working. Experimentation gives you the space to evaluate your work, and make tweaks and adjustments along the way based on what's working and what isn't. Experimentation also allows you to abandon the orthodoxy of "this is how we've always done it." With experiments, there is no one way of how things should work.

How can you sustain a culture of experimentation in your congregation? Dr. Rob Weinberg, [in a teaching to URJ Community of Practice participants](#), made a strong argument that one way is through how you manage people in your congregation, including: rewarding innovative behaviors, extending support to change-makers in your institution, fostering teamwork and partnership, and allocating time for planning, experimenting, and reflecting. In order to create a sustainable culture of experimentation, ask yourself:

- Does our staff team have time to immerse themselves in and plan for the future?
- Does our board take time to reflect, outside of programmatic and fiduciary responsibilities?
- Do our staff and board members come together to do this work collaboratively?

Dr. Weinberg argues that one way to support experimentation is to behave like Reform Jews: "We love tradition," he says, "and we're willing to change anything to keep it alive." We don't experiment for the sake of experimentation. We experiment because this moment in time requires it of us if we are to make Jewish living a force for relevance in our individual lives and in the life of our world. On to the next experiment!

Additional Resources:

1. "8 Principles that Drive Strong Congregations," by Amy Asin
2. "Cultivating a Culture of Experimentation"—URJ webinar with Dr. Rob Weinberg
3. "Leading in Challenging Times"—URJ Scholar Series session with Marty Linsky:
 - a. [Audio recording of full session](#)
 - b. [2015-16 URJ Scholar Series Resource](#), p. 29-44.
4. "How to Use Experiments to Build an Innovation Culture," by Tim Kastelle

Discussion Guide:

1. What challenges that have affected the life of your congregation could be addressed by adopting an experimental approach?
2. If the fear of failure could be taken away, what experiments would you like to try in your congregation?
3. How could your congregation reward innovative behaviors and support change-makers?
4. What behavioral changes would need to happen at the staff and board level to make that happen?

Rabbi Esther Lederman is the URJ's director of Congregational Innovation.



Experiment

Failing: How and Why Your Congregation Should Embrace It

by Rabbi David Fine and Rabbi Esther Lederman

Many years ago, one of us (the grayer, male one) was part of a crew of URJ rabbis who, on a trip to Israel organized by the UAHC, as the URJ was known at the time, met with Rabbi David Hartman, of blessed memory.

We were prepared to hear Rabbi Hartman, the leading intellectual of the Modern Orthodox movement of his time, lambaste us for a liberal attitude toward observance. Instead, he provoked us with a disarming smile and roared: “You are blessed to be part of the Reform Movement! You are not bound by halachah (Jewish law)! Experiment! Create! Bring life to the Jews!

Indeed, many of us have experimented in our congregations—reimagining financial support, building new models of engagement, forging novel paths to build Jewish families, innovating in worship. We live the principle that “reform” is more verb than noun and just as we pray, “You [God] create the world anew every day,” so, too, are we free to try new things daily.

Experimentation as a lived practice can succeed only in contexts and cultures in which failure is embraced. In other words, if we want to renew and reform Judaism now and into the future, we *must* create congregational cultures in which failure is accepted.

How can we do that?

Although there is no secret recipe from Mt. Sinai, there are basic principles to help build such a culture:

1. Choose a mindset of abundance over scarcity.

According to innovation expert Christopher Hawker, “Abundance-based leaders... are visionary and focus on what they want to do, regardless of whether it’s currently possible...”

Instead of asking why participants aren’t attending programs, seek out and learn from areas of your organization that *are* working. Be appreciative. In a culture that values abundant thinking, the paralysis that often accompanies mistakes and failure is lessened. This mindset inoculates leaders from thinking “This is not possible” or “What if we fail?”

2. Recognize the risk of *not* acting.

Often, we hear from congregational leaders who are resistant to change that there is risk in acting. This statement is true, of course, whether renovating the sanctuary, instituting a new dues system, or revamping an educational model.

Equally true is that there is risk in *not* acting. What do we risk if we don’t change the way we imagine our revenue structures, if we don’t try new engagement models, if we sing the same melody for *L’cha Dodi* every week? As URJ Vice President for Strengthening Congregations Amy Asin writes:

To stay relevant and thrive... change will be necessary in all congregations, even those that are doing well. The pace of change in the outside world demands it... Disruptive change allows us to compete in a world in which the current value proposition of congregations is not clear.

3. Accept that “fail” is not a four-letter word.

Think of “fail” as an acronym for “First Attempt In Learning.” Just as Yom Kippur, the most contemplative of Jewish days, is dedicated to learning from our past mistakes and failures, so, too, is it a day marked by hope as we commit anew to change in the year ahead. As we recognize, embrace, and learn from our failures, so do our congregations need to do likewise. When we—personally or within our congregations—try something new that doesn’t work, we always learn something valuable from it, pick ourselves up, and try again.

4. Build psychological safety in congregational teams.

In 2015, Google released results of a two-year study about team performance. As the [Harvard Business Review](#) reported, the study “revealed that the highest-performing teams have one thing in common: psychological safety, the belief that you won’t be punished when you make a mistake. Studies show that psychological safety allows for moderate risk-taking, speaking your mind, creativity, and sticking your neck out without fear of having it cut off – just the types of behavior that lead to market breakthroughs.”

To build psychological safety, the article suggests that teams replace blame with curiosity, ask for feedback, and approach conflict with others by being collaborative, not adversarial. Teams of synagogue professionals, clergy, and lay leaders that prioritize these behaviors have a greater likelihood for success—precisely because they are embracing failure.

So, the next time your congregation’s leaders fear failure when trying something new, remind them what we know from when the Israelites stood at the Sea of Reeds: That moment of paralysis and fear required a group of us to step forward into the water. To escape Egypt and become free people required us to overcome our fear—and take a risk. We, the Jewish community, have always been creative during challenging times. It’s how we’ve evolved, helping us to thrive for generations—and will do so, too, for generations to come.

Additional Resources:

1. “[Creating a Culture of Experimentation in Your Congregation](#),” Rabbi Esther Lederman
2. “[What Is Appreciative Inquiry?](#)” by David Cooperrider
3. “[High-Performing Teams Need Psychological Safety. Here’s How to Create It](#),” by Laura Delizonna, *Harvard Business Review*
4. “[What Does a Congregation with a Growth Mindset Look Like?](#)” by Rabbi Janet Offel and Julie Lambert, RJE, URJ’s *Inside Leadership* blog

Discussion Guide:

1. What is at risk for your congregation if you choose not to experiment?
2. What positive lessons can you learn from a previous attempt that had been labeled as a failure?
3. What areas are currently ripe for experimentation in your congregation?
4. How can you build opportunities for more feedback and curiosity into how you develop and consider new ideas? How can you build opportunities for reflection into the process of experimentation?
5. How might you reward or incentivize risk-taking and innovative thinking, at both the staff and board level? Do you need to develop resiliency within your congregation first? If so, how might you go about doing this?

Rabbi David Fine is a director of Consulting and Transition Management at the URJ. **Rabbi Esther Lederman** is the URJ’s director of Congregational Innovation.



Experiment

Congregational Perspective

The Value of Experimenting: Why We Invited a Golden Retriever to Shabbat by Deborah Rood Goldman

I'm a bit of an insomniac, partly due to the amount of time I spend, even in my sleep, dreaming up ways to engage young families. As president of a small congregation, it's a constant challenge to offer excellent speakers and programs that motivate more than just us die-hard, longtime regulars to attend Friday night services.

In October 2017, I attended the Union for Reform Judaism's valuable day of learning, "How Successful Congregations Embrace Change," where we learned about Harvard Professor [Marty Linsky](#)'s view on the value of using the language of experimentation to reduce the stakes in trying new ideas: "Through experimentation, you are testing a hypothesis in an effort to determine whether or not your hypotheses is correct. Whether your hypothesis turns out to be correct or incorrect, your experiment cannot fail, since the entire point was to test a theory out and see whether it works or not."

The idea of trying new ideas by viewing them as experiments made sense to me. As the URJ facilitators explained, there are big experiments, and then there are smaller experiments, when not everything is on the line. Other advantages, they said, are that we're able to make mid-course corrections and tweaks, and most important to me, "There is no such thing as a failed experiment. We are testing a hypothesis, and what we learn is valuable."

After that day of learning, I asked my temple board for their ideas to help attract young families, and a younger board member, Peter Ginsberg, spoke to me after the meeting had adjourned, offering to bring his family's golden retriever to a Family Shabbat dinner. "That will get the kids," he said.

I was a bit foggy on the details of how it would unfold, but I accepted his offer on the spot, telling myself that this qualified as a small experiment, our second one for a Family Shabbat.

The first Family Shabbat experiment we'd tried, [Family Shabbat: Soup and a Story](#), was pulled together quickly, with only a few days to publicize it. Rabbi Goodman typed up Shabbat blessings for the dinner, I cooked two pots of chicken soup with matzah balls, and my daughter baked mini challot and crafted pretty Shabbat candlesticks out of painted paper cups. The result was a welcoming ambience, good food, and a successful recitation of the Shabbat blessings before we went into the sanctuary for services. It was a good first try, though not a complete success.

For our second experiment, [Family Shabbat: Pasta Dinner & Meet Betsy!](#), Peter, Melanie, and their children Jack and Emma, both recent *b'nei mitzvot*, brought [Betsy the Therapy Dog](#) to our synagogue.

At a typical Friday night Shabbat service on a cold night in January, we sometimes count the Torah as part of our *minyan*. But this Shabbat, the Social Hall gradually filled with congregants for dinner. We'd shifted some variables: I had a reserve of newfound energy from using two simple words: "Order in." We'd also had ample time to publicize the event. My daughter baked mini chocolate challot this time, and the reusable paper cup candlesticks were ready for their second initiation.

Looking back, I believe the catalyst to the experiment's success was Rabbi Goodman's on-the-spot decision to ask Peter and his family to tell us about Betsy in the sanctuary.

Like the pied piper, Betsy led us cheerfully into the sanctuary, and as Peter walked up on the bimah with her, the younger kids automatically followed.

As a puppy, Betsy had shown all the attributes of a therapy dog. In fact, when Betsy took the required test to become a TDI Certified Therapy Dog, she passed with flying colors! The Ginsberg family is now happily committed to sharing Betsy in all sorts of settings where she can benefit others, including stroke victims and children with autism.

When Emma Ginsberg stood on the bimah to talk about Betsy, even the adults around me were visibly moved by her words. She told us about the time a non-verbal boy lay down beside Betsy, and when Betsy licked the boy's face, he made kissing sounds with his lips in response. She movingly described how his mother began to cry, overcome with emotion seeing her child do this for the first time.

The result of this second experiment was having members attend who aren't Friday night regulars, and who seemed glad they'd made the effort to be there. Maybe it was Betsy, or maybe it was the heartfelt words about her that ushered in a communal Shabbat feeling of goodness and joy. In my book, she's Betsy the *mitzvah* dog, and what the Ginsbergs are doing is *tikkun olam*.

Still, despite this success, I'm holding onto my notes about using the language of experimentation—because I'll continue to lie awake at night, dreaming up our next one!

Deborah Rood Goldman is the past president of Garden City Jewish Center in Garden City, NY.



Bring Participants into the Process

How to Better Involve Your Synagogue's Stakeholders in the Work You Do

by Cathy Rolland, RJE

Imagine the sight of dozens of face-painted children and the smell of barbecue. Imagine listening to their voices join in song for “Bim Bam Shabbat Shalom” and “Hinei Mah Tov.” Soon, you hear squeals of delight from a bouncy castle and excited parents chatting about plans to bring their families back for similar outside fun at future Summer Shabbat Series events.

This engaging community experience actually happened as part of the Young Family Shabbat Carnival at [Temple Sinai](#) in Denver, CO. How did it come about? The parents, professional staff, teachers, and board created it together, using a process that took time to learn and implement successfully.

Involving participants and all stakeholders in the decision-making process is the secret to success. It is one of eight principles that drive strong congregations. In the field of education, we often refer to this intentionally shared design approach as “co-construction.”

What is co-construction?

Co-construction is an approach that includes participants in the process of designing offerings intended for them. This approach relies heavily on experimentation, involving all relevant stakeholders, and on creating an environment in which any change can occur—including changes to current or future policies, programs, and event offerings.

This discipline is often confused with the popular contemporary concept of [design thinking](#), which, according to Tim Brown of the *Harvard Business Review*, is “a method of meeting people’s needs and desires in a technologically feasible and strategically viable way.”

While both methodologies strive to put the participants’ needs at the center, design thinking is a higher-level collaborative practice and is intended to induce radical change. In our experience working with congregations, design thinking cannot be successful without a solid culture of co-construction.

Why is co-construction important?

Dick Axelrod, author of the book *Terms of Engagement*, distills the importance of this method into one simple principle: “People support what they help to create!”

In other words, co-construction leads to greater ownership on the part of participants, as well as other staff members who will be tasked with implementing various aspects of your programs. When those participating and staffing your programs feel more ownership, they become more involved, and you have a greater likelihood of achieving your mission.

How do we co-construct?

When you bring the stakeholders into the design process, you can move mountains and even change the world. Here are four steps toward co-construction:

1. Identify all relevant stakeholders.

Synagogue stakeholders are clergy, professional staff members, and lay leadership, including board members and other volunteers. Of course, expected participants must be recognized as stakeholders, as well. In the case of the Shabbat Carnival at Temple Sinai, the stakeholders were the synagogue's preschool families, as well as professional staff and board members who are invested in creating family engagement opportunities.

2. Invite all stakeholders to participate in a congregational leadership team that will be involved in the thought and design process of relevant future offerings.

At Temple Sinai, the leadership team that was formed to design offerings for families was made up of six to eight school parents, the preschool director, the assistant director, two teachers, a rabbi, the executive director, the religious school director, and one or two lay leaders from the board of trustees.

Involving so many stakeholders in the creation of new offerings isn't necessarily an intuitive process, and this shift also doesn't happen overnight. Accordingly, the family programming operational meetings at Temple Sinai weren't always this populated. As part of [BUILDing Jewish ECE](#), a cross-denominational project that was designed to strengthen Jewish early childhood education centers in the Denver/Boulder community, Temple Sinai spent 18 months bridging the gaps between the various silos that had previously kept its leaders and families apart. Gradually, their leadership team grew to make sure that all voices would be heard, and the ownership of the important priority of family programming expanded beyond those who were spearheading these efforts originally.

3. Once your leadership team has been formed, create a shared vision and common goals, which will serve as the foundation for an action plan.

This process should begin with asking your stakeholders to define why they are there, both individually and as a team. Similar to [defining a congregational "why,"](#) this process will clarify this leadership team's joint mission, and will help in articulating a collective vision for what you aspire for this area of congregational life to look like. Once there is clarity around the mission and goals, an action plan can be developed, which charts each goal and lists action steps, people responsible, target dates for completion, outcomes, deliverables, and evaluation methods.

4. The process of co-construction cannot exist without a sense of sacred partnership, and building this kind of trust takes time.

Temple Sinai's team members progressively became more comfortable trusting one another and planning together. Eventually they began to co-construct several action plans that yielded events such as the Shabbat Carnival.

Co-construction lifts-up the role of the participants by making them a part of the design process. When co-construction is driven by sacred partnership and shared vision, the results can be exceptional.

Additional Resources:

1. “8 Principles that Drive Strong Congregations,” by Amy Asin
2. “Design Thinking,” by Tim Brown, *Harvard Business Review*
3. *Terms of Engagement*, by Richard H. Axelrod

Discussion Guide:

1. After reading this piece, reflect on the definition of co-construction, found in this article. Discuss:
 - What are you inspired by and eager to experiment with?
 - In which areas of congregational life are you currently co-constructing?
2. Place a Post-it® easel pad in front of the room.
3. As a group, pick an area of congregational life in which you would like to begin co-constructing. Write it on the top of the Post-it sheet.
4. Ask the group: Who are our stakeholders in this area of congregational life?
 - Think of professionals, lay leaders, program participants, and others in your community.
 - Focus on positions or demographic groups, and not on names of specific individuals.
5. On the Post-it sheet, create a table and list each type of stakeholder as a column header (each stakeholder should be a separate headline in the table, divided by lines from the other stakeholders).
6. Divide the group into chevruta pairs or small groups, and assign a different type of stakeholder to each team. Ask each team to walk around the synagogue and take pictures that illustrate the goals their assigned stakeholder might have in this area of congregational life.
7. Reconvene as a full group. Ask each small group to share their pictures with the full group.
8. Ask the full group to articulate what goals are represented in each picture.
9. Write each goal on the Post-it sheet under the appropriate stakeholder.
10. Ask the full group:
 - What do we notice? Looking around the room, who is missing?
 - What do we appreciate?
 - What do we wonder? What additional voices can we bring to the conversation about this area of congregational life?

Cathy Rolland, RJE, is the URJ’s director of Families with Young Children and Emerging Networks.



Bring Participants into the Process

Congregational Perspective

How Listening to Our Members Helped Us Create Meaningful Jewish Experiences

by Susan Ellenby

We do a lot of listening at [North Shore Congregation Israel \(NSCI\)](#), and not just the kind where you nod your head and smile. We listen to understand, we listen to improve, and we listen to [co-construct our offerings with our members](#).

As a large congregation located in the north suburbs of Chicago, we have members and friends of many backgrounds, perspectives, and expectations. We listen to our folks. And then we take action.

How does that work? Here are some examples:

1 Partnering with a non-denominational preschool to “meet families where they are.”

At the conclusion of a successful series of parent-and-tot drop-ins, we sought a way to continue the Jewish experience of the participating families. We knew our first step was to listen.

This same group of families had chosen to send their children to a non-denominational preschool, but despite the fact that these children would all be in the same class, their parents mentioned they would miss the warmth of a Jewish connection in their children’s educational experience.

After exploring a variety of avenues to help them achieve this goal, we decided to lease space in the building where their children’s preschool was located and offer a Shabbat enrichment class there. This enabled our teachers to walk the children to our Shabbat class at the end of their preschool day.

We experimented with different activities in this Shabbat class, including holiday-based crafts, songs, stories, and games. Our congregation’s clergy team supported this endeavor and agreed to visit the Shabbat class regularly to lead blessings, sing songs, and tell stories. As the semester went on, the students loved playing the guessing game of which clergy member was coming that week for the visit.

When word spread about how valuable our class was in these families’ lives, the families of students one year older asked us to create a similar experience for them. Again, we listened and learned about their preschool schedule, then made a special arrangement for an enrichment class before their school day started.

At the end of the spring semester, our graduating students were offered the opportunity to enroll in NSCI’s Kindergarten Sunday School Program at a significantly discounted rate, with no obligation of membership for the year. This effort was led by our director of education and supported by our encouraging board of trustees and clergy team. Everyone recognized the power of community connections.

Our Shabbat enrichment class has been a great success. Now in its fifth year, it has engaged a total of more than 100 students, and eight families have continued on to learn in our synagogue classes.

2. Meeting the needs of grandparents.

A group of suburban-based grandparents approached us for help in introducing positive Jewish experiences to their young grandchildren, who all live in the city of Chicago. We listened—and learned that many of these grandparents go into the city on Saturday afternoons to provide childcare and a break to the parents.

As a result, we partnered with [Chicago Sinai Congregation](#) under the auspices of the [Jewish Federation of Chicago](#) and created Saturday afternoon programming for these grandparents and their grandchildren in Chicago. Such opportunities helped these families make connections to other Chicago-based families and Jewish opportunities they hadn't been aware of.

Now, we're looking into offering similar programming for Hanukkah and Passover, based on participants' requests, and NSCI has become a resource for the parents of these young children, some of whom are considering moving to the suburbs.

3. Connecting with unaffiliated parents.

Leading up to the High Holidays, we receive many questions from unaffiliated parents who are looking for a place to expose their young children to Judaism. We have in-person conversations with every family who expresses interest in attending Tot High Holiday services – a time when we get to know the families, what they seek, and what's missing in their daily Jewish lives.

We use this information to follow up with those families not only during the High Holidays but throughout the year when we host programming and opportunities that match what they're seeking. We also take the time to introduce these families to one another and to other resources in the Jewish community, which magnifies the power of one-on-one relationships throughout the community.

Our days of listening are not over. Our teachers listen when they meet folks at the local grocery store; our clergy listen when they interact with a family; our board members listen when they speak to congregants. We continue to listen to understand and record the vision people seek – and we have to listen because doing so creates powerful one-on-one relationships and conversations.

NSCI promotes a culture of “yes” and “let's try.” Because of this mentality, we know we can continuously encourage and empower families with young children to have meaningful and impactful Jewish experiences, both in our synagogue building and beyond its walls.

Susan Ellenby is the engagement manager at North Shore Congregation Israel in Glencoe, IL.



Redefine Success

5 Questions (and Answers!) about New Measures of Congregational Success

by Amy Asin

View the video to the left before reading this article.

Congregations have a tendency to measure success by counting the number of heads in the room—but if they want to become stronger, this is actually the number one habit congregations need to break. Since 2013, I've had the privilege of speaking to hundreds of congregational leaders about this in my presentation "Beyond Counting Heads." Now, it's also [available in a short video](#), and in this [accompanying article](#), which details the five-step process of adopting new measures.

When I give this presentation, I'm often asked the same five questions, all of which speak to congregational leaders' concerns about adding new measures of success (relationships, meaning, and impact) to their existing ones (including head counts, budget, food/space, and complaints). Here are those questions and my answers to them, designed to help congregations look to the future.

1. Why do we need to adopt new measures?

Most congregational leaders are concerned about traditional measures of success, and perhaps more than anything, about budget. They should be, because having an economically sustainable organization is critical to its present and future—but if all we care about is a balanced budget, then we're indicating that we don't care about whether or not congregants are having meaningful or transformational experiences.

Some people fear that if we start looking at newer measures of success, we will lose sight of budgets and headcounts—but this is a false assumption. We must also get better at understanding the tradeoffs we make when we cut expenses. To assume that the quality of what we do will stay the same is erroneous. Adding new measures doesn't mean getting rid of the existing ones; it does mean adding perspective to our financial decisions.

2. Doesn't it take a lot of time to work on and talk about relationships, impact, and meaning?

Maybe. If your current board and committee meetings focus on how to get more people to attend your events, how to shave expenses to stay within budget, or how to corral more volunteers, then adding in discussions about how to achieve success under a new set of measures could take more time.

But consider this: Maybe you're spending too much time on the existing discussion. If you're only having surface-level conversations with congregants, then yes, developing deeper intimacy will be difficult; if leadership does not embrace a shift toward placing congregants first by being willing to talk about these critical issues, then change simply will not happen.

3. What if my board members aren't good at building relationships?

Not every board member was chosen for their position because he or she is outgoing and great at working the room at an *oneg*—and that shouldn't be expected. Neither, though, should it be expected that all of that work should be left to clergy or that only top leadership builds relationships. If we want to be stronger, we will likely need to double or triple the number of congregants who see themselves as leaders in our congregations. Everyone is responsible.

4. Won't the new measures be based on anecdotal evidence?

Again, maybe. This question assumes that the current data we use to make decisions in our congregations is the correct data and that any new data measures will be weaker. Instead, I challenge the assumption that we are currently using the right data. Anecdotal evidence, while imperfect, is better than completely ignoring a whole set of factors, and it is possible to systematically collect qualitative data—but it takes a shift in perspective.

5. How do we actually do this?

Going beyond counting heads is a five-step process that includes reaching out to congregants to understand more deeply how they define success. I outline this process in [this article](#) and [my video presentation](#). As congregations around North America start to experiment with new methods of collecting data, we continue to hear new, creative examples of how our communities are adopting new measures of success in order to stay agile and relevant now and for the generations to come.

Additional Resources:

1. [“8 Principles that Drive Strong Congregations,”](#) by Amy Asin
2. [“Beyond Counting Heads”](#)—video presentation by Amy Asin

Discussion Guide:

1. Begin by watching Amy Asin’s video presentation of how congregations can go “beyond counting heads.”
2. Discuss as a group:
 - What questions do you have about what you saw in the video?
 - What do you currently do at your congregation to reinforce a culture where budget and attendance (“counting heads”) are seen as the primary (or only) measures of success?
3. Depending on the size of your group, stay in one group or break into smaller sub-groups. Discuss the following questions:
 - How do you currently go “beyond counting heads” and measure success through the prisms of relationship, meaning, and impact?
 - If you could gain a better balance between the existing measures of success (attendance, budget, etc.) and the new measures (relationship, meaning, and impact):
 - How might your congregation benefit from this revised approach in regards to measuring and defining success?
 - What would your concerns be about shifting the way you define and measure success?
 - Overall, how do the potential positive outcomes compare to the possible negative outcomes? Do you think that it would be desirable to make this shift?
 - What barriers and challenges might you face if you try to shift from counting heads to defining success through the new measures (relationship, meaning, and impact)?
4. If you broke into sub-groups, come together as a single group and debrief the discussion. Based on your conversations, do you believe that this would be a strategic time to move forward and test the new measures?

If you want to move forward, follow the five-step process outlined in the article [“Change Your Congregational Culture by Changing How You Measure Success.”](#)

Amy Asin is the URJ’s vice president for Strengthening Congregations.



Redefine Success

Change Your Congregational Culture by Changing How You Measure Success

by Amy Asin

Twenty-first century synagogue life challenges congregations to shift from a program-driven culture to a people-driven culture. One of the biggest barriers to this shift is the way we discuss and measure success. What we measure drives our conversations and thus our behavior. We need to shift from only considering traditional measures of success (these include attendance, whether or not we met budget, whether or not we ran out of food, number of complaints received, and whether or not staff seemed on-task) to adding measures that go further. These new measures must address the whole of congregational life, and

revolve around what matters most to our members. ([Watch my video](#) on why this shift needs to happen and [read this accompanying article](#) addressing congregational leaders' concerns about new measures.)

We need not discard the old measures of success, but in order to stay relevant and to succeed, we must also incorporate and focus on these new measures

Relationships: Are we helping congregants build deep relationships with people who will be there for them in difficult times and times of joy?

Meaning: Are we building meaning by bringing Jewish tradition and wisdom to the challenges our congregants face?

Impact: Are we having an impact on our congregants and the world around them?

To add these new measures to your toolkit, I propose a five-step process:

1. Define the new measures.

What do relationships, meaning, and impact actually mean? Different congregations will define these measures differently, so figure out what they mean for your community. To do so, talk to members of your congregation, interview congregants, and hold board and committee discussions about these terms. Ask them to finish this sentence: "An event or experience at my congregation is successful to me when _____." If you immerse yourself in how your community views these measures, you'll be able to use the vocabulary your congregants are using—which is, in fact, how your membership defines success.

2. Analyze what you currently do.

Once you've established your congregation's definitions of these three measures, think about how your current work stacks up when viewed through these lenses. Ask yourself: How would we do if we were measuring Purim or High Holidays by our congregants' definitions of success? Test congregant-facing events and experiences, as well as back-end processes, such as dues policies, new-member onboarding, and committee meetings. If any of these elements don't seem successful through the lens of congregants' definitions of success, ask yourself: How could we do things differently?

3. Start talking about new measures.

Begin every board or staff meeting with a 15-minute discussion about your progress in building relationships, creating meaning, and making an impact (according to your members' definitions). Then, expand this discussion to anyone who runs a program at your congregation. Anyone who has a leadership position or a

leadership role needs to embrace these new measures in order for them to truly become your congregational mindset.

These concepts must also be incorporated into non-programmatic and non-administrative interactions at your congregation, such as hallway discussions with congregants or the sentiments in condolence cards. When you take these actions, how are you building a relationship, creating meaning, and making an impact?

4. Test your measurement tools on one area of your congregation.

There are a variety of measurement tools your congregation can use to test its new measurements, including focus groups and surveys. Build your measurement tool based on your membership's definitions of relationship, meaning, and impact. For example, if your members have defined success in relationship-building as having a strong sense of community beyond congregational events, you could ask questions like: To what extent do you have relationships that extend beyond the walls of the congregation? How many times have you been to other members' homes for Shabbat dinner?

Don't tackle all areas of congregational life at once; rather, pick one area to test this tool. Try choosing a specific program (a Purim celebration), demographic group (parents of religious school kids), or office function (new member onboarding).

The frequency of measuring should be tied to the specific area you're focusing on. You will see that some programs will need to be measured every time they take place, while it makes more sense to measure other programs once a quarter or once a year. When you establish the frequency for these measurements, you should also take into account your staff or lay leadership capacity to assess the data from your measurement tools.

5. Expand your test.

Once you determine how your measurement tool works for your congregation and become comfortable with it, reflect on what you've learned and consider the best way to expand your test into another area of your congregation. If you initially tested a program, might it make sense to test another program or to shift your focus to testing a demographic group? Engage in constant reflection as you expand this work to more areas of congregational life.

These new measures of success support the shift to a congregant-driven culture. Going "beyond counting heads" really means shifting the focus from thinking about how many people are showing up at an event to thinking about individual congregants and their relationships with the congregation over time. It means assessing congregants' patterns of behavior and connecting with them according to their individualized interests.

This isn't an easy shift, but it is necessary in order for our congregations to continue thriving now and for generations to come.

Amy Asin is the URJ's vice president for Strengthening Congregations.



Redefine Success

Congregational Perspective

Creating Successful Transformational Change in Our Congregation

by Lori Kowitz and Rabbi Stacy Schlein

In 2013, Ganon Gil, the early learning center of [The Temple Tifereth Israel](#) in Beachwood, OH, had decreasing enrollment, was not meeting most of the community's needs, and was no longer financially viable.

We had to make a change and we faced a daunting decision: close the program or expand it to full-time and include an infant program for children as young as six weeks. After extensive study and evaluation, we made the bold decision to pursue the latter.

Soon thereafter, our congregation was blessed to receive a grant from the Mandel Foundation that enabled us to create a state-of-the-art early learning center. In May 2016, we opened a brand-new, full-service family learning center. Making these structural and philosophical changes redefined and reenergized our program, but in retrospect, they marked only the first stage of our transformation.

In November 2016, our congregation joined the [URJ Full-Time Early Education Community of Practice](#) (CoP), which expanded our growth even more. Along with 12 other congregations with full-time early childhood centers from across North America, we embarked on an 18-month journey of learning, experimentation, and networking.

Through this CoP, we encountered two concepts that shifted the way we approach and evaluate our work: “Start with Why” and new measures of congregational success.

The first concept, “[Start with Why](#),” popularized by Simon Sinek, challenged us to identify our “why:” our core beliefs and the reason we exist as a congregation. In our CoP, several exercises inspired us to think about our sacred purpose and to strategize about how we can focus our work accordingly.

The second concept inspired us to evaluate our success in new ways – by measuring relationships, meaning, and impact. We were challenged to focus on these key questions:

- Are we helping congregants build deep relationships with people who will be there for them in difficult times and in times of joy?
- Are we building meaning by bringing Jewish tradition and wisdom to the challenges our congregants face?
- Are we having an impact on our congregants and the world around them?

Together, these two concepts helped us truly reexamine our goals and move toward [transformational change](#): Prior to the CoP, we strove to provide more options for people as a means to expand their experiences with the congregation. During and after the CoP, we shifted our focus to have greater impact on people's lives by strengthening relationships and creating meaning.

For example, we took a new approach to our annual program calendar, merging the calendars of our early learning center and our learning center. By placing the two calendars side by side, we could see all the programs we offered in 2018, making it clear we were offering entirely too many.

In planning for 2019, we took a more strategic approach and began the conversation by focusing on our “why.” We then ensured that the programs we were scheduling aligned with our core beliefs and aimed to accomplish the goals of building relationships and helping congregants find meaning. Prioritizing our programming based on our “why” also helped us identify opportunities to offer joint initiatives, as appropriate, by combining efforts of our early learning center and learning center.

Although the focus on our “why” and on new measures of congregational success started in our early learning center, it expanded to the congregation at large. Our new senior rabbi, Jonathan Cohen, is working with us to continue experimenting with how we apply our “why” and the measures of relationships, meaning, and impact to our “what” – learning, prayer, and programs. We have already used these principles to guide us in assessing and reimagining the way we celebrate holidays and other congregational happenings, and this is only the beginning. We look forward to continuing to focus on our “why” and on the measures of relationships, meaning, and impact to track our success—in our early learning center and beyond.

Lori Kowitz is the director of Ganon Gil, the early learning center of The Temple Tifereth Israel in Beachwood, OH. She also serves as the president of Early Childhood Educators of Reform Judaism (ECE-RJ). **Rabbi Stacy Schlein** is the associate rabbi and director of learning at The Temple Tifereth Israel in Beachwood, OH.



Decide What to Stop Doing

What to Stop: The Forgotten Objective in Strategic Planning

by Amy Asin

Most congregational leaders – when seeking to adapt their congregations to current realities and in order to bring in new members and/or create a sustainable financial situation—ask what new programs they should add or what new outreach they should do. As part of these generative conversations, it is also critical to ask the question: “What should we *stop* doing?”

In order to free up resources to do new things, you must either raise more funds, train more volunteers, or find something to stop doing. Simply layering more work upon overburdened clergy, staff, or volunteers won't work and by narrowing your focus, you raise the level of importance of the new initiatives, making them more likely to succeed.

Here is some guidance on how to make the decision about what to stop.

1. Establish a task force to experiment with using criteria to decide what to stop.

The data required to evaluate your offerings doesn't exist in the mind or laptop of any one person at your congregation. In order to properly assess what you do, you'll need to establish a process and gather a task force of people committed to trying it out.

This task force will have to be willing to take a leap of faith and understand that you're experimenting with a new tool and a new way of thinking. In fact, you may want to make a pact with the group that, in the first year, you're only going to use it to learn; in year two—once you've gotten more experience with the tool—you can use it to decide what to stop doing.

When creating said task force, make sure to include someone from your budget and finance team, and someone from your clergy/professional staff (if you have them). Overall, the group should be populated with people who best know the work being evaluated.

2. Set clear criteria for evaluation.

In order to decide what to stop doing, the task force should choose consistent criteria for examining your current programs and services. Choose from among the following criteria, rating each on a three-point scale ([view this full rubric of these criteria](#), including rating instructions); the programs with the lowest scores based on these criteria will be candidates for stopping.

- **Mission alignment:** To what extent does this activity directly help you achieve your mission?
- **Relationship building:** How much does this program deepen the sense of community among congregants or between congregants and leadership?
- **Meaning:** How much of an opportunity does this program provide to bring Jewish tradition to the big questions in congregations' lives?

- **Impact:** How much does this program help congregants become the best versions of themselves or make the world a better place?
- **Total number of people engaged:** How many individuals did this program engage?
- **Potential for growth:** If this activity is ongoing, is there potential for growing its audience?
- **Priority audience reached:** Are you trying to reach a particular audience and, if so, does this activity reach that audience?
- **Budget requirements:** What are the net costs of running this program (net positive, negative, or breakeven), including paid staff and out-of-pocket costs, and factoring in revenue? Note that in most cases, the net cost will be negative.
- **Volunteer requirements:** How much volunteer time (which could be redeployed elsewhere) is used to run this program?
- **Grant funding:** Is there a donor to consider, especially if ending a program?
- **Complexity of execution:** How much of a drain on facilities, communications, or other support staff does this initiative entail?
- **Scheduling:** Does this program create a scheduling conflict with other initiatives?
- **Perceived or understood congregant satisfaction:** Considering word-of-mouth, intuition, and concrete evaluation data, how much do congregants “like” this program?

3. Use your judgement.

Using a set of evaluative measures will help you effectively collect a lot of information from many people in an organized and clinical way. That said, no evaluative tool can tell 100 percent of the story; eventually, you will need to use your judgement, informed by the data you’ve gathered. This could mean assessing and analyzing the data you receive, as well as adjusting your evaluative tool and adding criteria you hadn’t thought of before.

4. Stay focused and calm.

Deciding to stop doing something isn’t always easy. Most likely, all of your offerings are adding some value to someone – which means someone is going to be upset that you’re cutting their program.

A few things that you can do to help your case:

1. Make sure that your board, volunteers, and staff are bought into the process as much as possible.
2. Rely on the task force involved in collecting the data to help make your case.
3. To the extent possible, be clear about what you are moving *to* – or at least a process for how that will be decided.

Remember: It may sometimes be difficult, but ultimately, you’re doing this for the good of the congregation and its ability to redirect resources to priority areas.

This process for deciding what to stop integrates the typical measures of congregational success (budget and attendance) with the [new more mission-driven measures](#) (relationship, impact, and meaning), attempting to find a balance between the two. Resources available to congregations are limited, and clergy, professional, and volunteer time is precious. If you’re going to lead your congregation to try new things, you must stop doing something else. A strong process for deciding what to stop will help make tough decisions both easier to make and easier to implement.

Additional Resources:

1. “8 Principles that Drive Strong Congregations,” by Amy Asin
2. “What to Stop Doing”—rubric of criteria and rating instructions

Discussion Guide:

1. Who might be a fit for the task force that will experiment with using these criteria?
 - Which leaders and community members are naturally adaptive and can thrive in a culture of experimentation?
 - Discuss specific individuals from your clergy, staff, finance team, and program leadership who should be invited to participate in the task force.
 - Which new and diverse voices should be considered as task force candidates?
2. What role should the task force play regarding decisions? Are they making recommendations to the board? To a staff team? Do they have final authority?
3. Some key decisions need to be made about using the tool:
 - Discuss the criteria as a group, raising any questions or thoughts.
 - You will need to narrow the list of criteria to a subset of 5-8. Are there criteria that must be included? How can you choose among the criteria so that you have a balanced assessment of each program (for example, not too focused on budget, political considerations, etc.)?
 - Agree on the measures that you will use for each criteria.
 - Who will do the actual ratings? How will you make sure that you have the most objective and consistent ratings possible while still appropriately involving the people responsible for the program?
4. One way to lower anxiety about the tool is to experiment with it for a period of time before using it to make final decisions.
 - Is your leadership ready to use the tool immediately without a learning period?
 - If not, what is the best process for bringing people into using the tool?
5. Transparency can be helpful in managing the emotions that are associated with a change on the horizon. How and when can you bring your community into the process? What conversations do you need to have and with whom?

Amy Asin is the URJ’s vice president for Strengthening Congregations.



Manage the Transition, Not Just the Change

**Managing Change:
The Only Constant in Today's World**
by Rabbi Janet Offel

Every summer, many congregations prepare to welcome new rabbis and other senior staff members to the temple family. With this period of change comes many emotions—excitement, anxiety, curiosity, sadness at the departure of a long-time beloved rabbi or other staff member...

In our work with at the URJ, Rabbi David Fine, Rabbi Paula Feldstein, and I interact with Reform congregations all around North America that are in the midst of change. Whether it be a clergy or senior staffing

change, a synagogue merger, an emerging collaboration between multiple synagogues, or any of the other myriad changes that are so much a part of today's world, the only constant seems to be change.

As congregational families, how do we manage feelings of disruption and discomfort in this world of constant change?

We are all familiar with stories from the secular world in which new corporate CEOs have failed spectacularly and of corporate mergers that were deemed to be disasters within weeks of their announcement (think AOL-Time Warner). William Bridges, who in 1991 published the first edition of his groundbreaking book *Managing Transitions: Making the Most of Change*, says that in most instances, the problem isn't the change itself but the way people react to it. He calls these reactions "the human side of change."

Bridges notes that a change in one's own world can lead to feelings of disrupted expectations, a threatened sense of security, and fears of looking foolish, awkward, or embarrassed. In a synagogue setting, these feelings may occur among *b'nei mitzvah* families who were looking forward to the soon-to-be-former rabbi officiating at their children's service. Other congregants may wonder: Will the new rabbi "get" and understand my family and me? Members often feel they are missing key information that might help them understand the implications of the change: Why have so many senior staff members left our synagogue in the last couple of years? What will that mean for our synagogue's future and my own place in it? In Bridges' lexicon, the psychological reorientation that we go through in coming to terms with a change is called "transition management."

In other words, the change is the new rabbi's arrival or the completion of the merger of two congregations. The transition is the process of letting go of old ways and getting comfortable with the new rabbi's personality and behavior, or with the congregational *minhagim* (customs) that new leaders institute.

Bridges developed a model for managing transitions in which he defined three phases of the process: ending, neutral zone, and new beginning.

Endings often include emotions that we label as negative: sadness, anger, denial, resentment, fear, anxiety, loss, betrayal, and abandonment. These are predictable, normal emotions when grappling with an ending. Even when the change is positive, there are feelings of ending and loss. Of course, there can also be feelings of excitement and anticipation in the ending zone, but they are often bittersweet and mixed with at least a twinge of sadness and loss.

The neutral zone is often characterized by feelings of confusion, disorientation, apathy, disconnection, and impatience. It is a time in which people complain about a loss of leadership (the outgoing rabbi seems to have "checked out" and the new rabbi isn't here yet, for example). Frequently, synagogue leaders ask how many members

they should expect to lose when going through the rabbinic transition process. It is because of their own fears of the neutral zone that this becomes such a big worry. A wonderful video titled “[The Trapeze](#),” based upon the poem by Danaan Parry, is worth watching for a better grasp on this phase. Indeed, the neutral zone is that moment when you have let go of the old trapeze bar but have not yet grabbed the new one, evoking a mix of emotions: fear and excitement, impatience and curiosity, disorientation and openness.

Individuals finally enter the **new beginning** phase once they become comfortable with the change. At the very least, congregants feel a sense of ease in this phase. When the transition process is carefully managed, fully embracing the new beginning leads to a sense of re-commitment and re-engagement and, as a result, a congregational family that is energized, vigorous, and renewed.

Additional Resources:

1. “[8 Principles That Drive Strong Congregations](#),” by Amy Asin.
2. [Request access to the URJ Rabbinic Transition Roadmap](#).
3. The URJ’s Transition Management team, [Rabbi Janet Offel](#) and [Rabbi David Fine](#) are available to assist congregations with inquiries about transition management.
4. The [Senior/Solo Rabbinic Transition group](#) in The Tent.
5. “[8 Tips for Managing Your Congregation’s Rabbinic Transition](#),” by Rabbi Janet Offel, *Jewish Philanthropy*

Discussion Guide:

1. Think of a time in your own life when a change (of any kind) had an impact on you:
 - What was the actual change that occurred?
 - What were the milestones or significant moments that signified the various phases of transition for you (ending, neutral phase, new beginning)?
 - How did you move through the emotions generated by this change?
 - What could have helped you manage the dynamics of the change better?
2. Think about a change that has taken place in the synagogue:
 - How did people react to the change?
 - Now that you have an understanding of William Bridges’ model of transition management, how well did your congregational leadership manage the change process that your community was undergoing? Was there an outlet for communication of emotions for the different audiences in your congregation?
 - What were some of the ways in which there was acknowledgment and responsiveness to the concept of endings, the neutral zone, and new beginnings?

Rabbi Janet Offel is the URJ’s director of Consulting and Transition Management.



Manage the Transition, Not Just the Change

Helping Congregants Deal with the Five Stages of Change

by Rabbi Paula Feldstein

On the bimah stood two large, dark brown wooden podiums. The rabbi spoke from one, and the cantor sang from the other. Being four feet wide, they took up a lot of space, and anyone under 5'5" needed to stand on a step to be seen by the congregation. The podiums were also very dark on an otherwise airy bimah, standing in stark contrast to the colorful stained-glass windows that filled the back wall.

The rabbi decided to remove the two podiums and use microphones with stands and a small Torah reading table instead. The bimah was brighter and more open, and the rabbi and cantor felt more connected with the congregation.

There was only one problem.

Although many people were very happy about the change, others were very upset. In fact, they *hated* it. The clergy was baffled. All they did was remove two podiums. What went wrong?

While many of us think of change or transition as the beginning of something new, in reality change always begins with an ending. Noted change management consultant [Dr. William Bridges](#) frames the endings stage of transition as a time of grief and loss. It is critical, Dr. Bridges argues, to deal openly with the losses people are experiencing or anticipating by helping them talk about the feelings the change raises for them. The only way people will be able to move into a new reality is if their loss is recognized and legitimized.

In our example above, synagogue leadership neglected to recognize that the podiums were meaningful to some people—and that their removal felt like a loss.

In Western society, we are very uncomfortable with the idea of loss, yet it's a normal part of life. The way we think about loss has been vastly influenced by the “five stages of grief,” which were introduced by psychiatrist and author Elizabeth Kübler-Ross in her book *On Death and Dying*. These stages have since been adopted as applicable for any type of loss, not just death.

While not everyone goes through all five stages or in Kübler-Ross's order, they are useful in understanding the range of emotions and mindsets people may experience when dealing with change.

Stage One: Denial

This is generally a shorter stage that may come with the initial shock of being confronted with a change. Removing the podiums without any warning or explanation created shock for people as they walked into the sanctuary, their holy place.

At this stage, communication is key. Share information openly, but give people time to digest it. Do not be afraid to reiterate the news several times in different ways.

Stage Two: Anger

People often feel angry about the loss, and they may fear or resent what they will have to do to adjust to the new reality. The people who were upset about the removal of the podiums had memories of standing at them—on their own or with their children—and associated those memories with the bimah itself. Their anger needed to be heard and understood.

At this stage, listening is critical. Allow people to express their anger and convey empathy for what they will lose during the change. Having empathy means understanding and accepting their feelings—not “fixing” the problem.

Stage Three: Bargaining

At this stage, people may try to come up with a compromise or postpone the change as long as possible. Listen to suggestions, as they will help people feel heard and may ultimately result in ideas to make the change happen in a way that is easier to accept.

In the case we mentioned, the compromise was to return the podiums for High Holidays during the first year and then to experiment (a great word!) with different configurations of furniture on the bimah.

Stage Four: Depression

At this stage, most people have realized that the change is going to happen whether they like it or not. They feel sad and tend to push others away; there may be a loss of morale and energy.

This is the time to continue to listen, acknowledge the loss, offer support, and, if possible, show the positive sides of the change.

Stage Five: Acceptance

This is the point at which people realize that the change is not going to go away, and they need to embrace the new reality. People let go of the loss and begin to become excited about what the future has to offer. During this stage, keep the momentum going and be sure to thank and praise those who have made it through the change and have helped make the change possible.

All congregations experience change—from welcoming new clergy to making worship changes, such as removing podiums from the bimah. Whatever the change, congregants will experience the various stages of loss—each at their own pace.

Consider a variety of ways to get congregants, staff, and other leaders to talk and listen to one another, including one-on-one conversations and facilitated exercises with stakeholder and constituent groups. By supporting your community members as they acknowledge the change—and the feelings of loss that accompany it—you will help them become excited about the future.

Additional Resources:

1. [Request access to the URJ Rabbinic Transition Roadmap.](#)
2. The URJ's Transition Management team, [Rabbi Janet Offel](#) and [Rabbi David Fine](#) are available to assist congregations with inquiries about transition management.
3. The [Senior/Solo Rabbinic Transition group](#) in The Tent.
4. *Managing Transitions: Making the Most of Change* by William Bridges.

Discussion Guide:

1. What change has your congregation made recently that was met with resistance?
 - What were you putting an end to, and what were you adding?
 - What were the losses that people may have felt with that change?
 - How could those losses have been addressed in advance of the change?
2. Discuss a change your congregation is planning or thinking of making in the future:
 - What will you be putting an end to, and what will you be adding?
 - What losses do you think that people might feel associated with this change?
 - What could you do to give people an opportunity to grieve those losses or to express their feelings about the losses?

Rabbi Paula Feldstein is the URJ's manager of Transition Support.



Manage the Transition, Not Just the Change

Congregational Perspective

The Power of Having an Interim Rabbi by Skylar Cohen

When I became president-elect of [Congregation Beth Emek](#) in Pleasanton, CA, we faced an unexpected rabbinic transition. Here's how we turned our challenge into a success story.

First, the outgoing president and I consulted with Rabbi Alan Henkin, the director of the Central Conference of American Rabbis (CCAR)

Rabbinic Placement Commission. The CCAR is the professional association of the Reform rabbinate, and as a member of the Union for Reform Judaism, our congregation is eligible for rabbinic transition services offered by the CCAR. Rabbi Henkin gave us several options, but strongly recommended we hire an interim rabbi from among a growing group of rabbis specially trained to help congregations positively transition from one senior rabbi to the next.

The board not only approved the recommendation to engage an interim rabbi, but also decided to hire him or her for a two-year term—rather than the usual one-year timeframe. A couple of factors contributed to this decision:

- The timing of our rabbi's departure meant we were out of synch with the CCAR's rabbinic search cycle, and the extra year would give us some much-needed breathing room before launching the search for our permanent senior rabbi.
- We needed time as a community to prepare to welcome our next rabbi, and although the interim rabbi would be with us for two years only, we understood that he or she would not be eligible to apply for our permanent position.

We quickly formed a search committee that got right down to work to find the interim rabbi best suited to lead us through our transition. Because our congregation had not had a rabbinic transition in many years, we learned a lot along the way: how to form a search committee that is representative of the congregation, what questions to ask candidates, what gets included in the rabbi's contract, and how best to negotiate all those details. Although the [URJ provided support](#) and the Rabbinic Placement Commission provided guidance, we needed to make these decisions ourselves, in light of our congregation's governance style (or lack thereof) and culture. Perhaps the hardest lesson we learned is that a rabbinic search is not a "one size fits all" process.

After an intense three-month search process, we welcomed Rabbi David Katz as Beth Emek's interim rabbi in the late summer. He hit the ground running, not only dealing with our transition issues, but also—and more importantly—as our rabbi, officiating at lifecycle events, teaching, and leading services. Although he would be with us only temporarily, his commitment to the congregation was complete, and any concerns that he was the "substitute teacher" while we waited for our "real" rabbi were quickly allayed. In fact, we saw an increase in engagement among members during the interim period.

It also allowed us to assess our priorities, values, and identity, separate from our relationship with a specific rabbi. We could evaluate changes in ritual and programs, as well as challenge assumptions and the status quo. In some areas, we opted to maintain the status quo during the interim period. For instance, we deferred the decision about adopting the new *machzor* (High Holiday prayer book) because we felt the new rabbi should be involved in the decision. In other cases, we used the opportunity to make some changes we knew might be controversial or unpopular. To his credit, Rabbi Katz was willing to take the heat on them.

We were concerned, of course, that congregants would get attached to the interim rabbi and, in fact, many people did—myself included. But that was a good thing. Like any “summer romance,”—which is how I think of the relationship—we knew from the start it wouldn’t last but that we’d have an opportunity to say graceful goodbyes. At the end of the two-year term, I was touched by the outpouring of affection, especially from people who, when our longtime rabbi left, swore they would never like another rabbi again. Most of all, our summer romance gave us time and space not only to conduct an effective search for our new senior rabbi, but also to create a neutral environment within the congregation in which the incoming rabbi would have an opportunity to succeed on his own merits.

Skylar Cohen is the past president of Congregation Beth Emek, in Pleasanton, CA. She serves on the North American board of the Union for Reform Judaism.

Union for Reform Judaism | 633 Third Avenue, New York, NY 10017
NYC: 212-650-4000 | Washington D.C. (RAC): 202-387-2800
Knowledge Network: URJ1800@URJ.org | URJ.org



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