MOVING TO THE LEADING EDGE: VOLUME 1

# Principles that Drive Strong Congregations

A URJ Resource and Discussion Guide to Move Your Congregation Forward

UNION for REFORM JUDAISM

Building Communities.
Reimagining Jewish Life.

# 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 900 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.

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## 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.

Many additional congregational leaders contributed their knowledge to the articles in this resource. Special thanks and acknowledgement are extended to the following individuals and congregational leadership teams (listed alphabetically by state, then city):

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## Photos

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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.**

   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. **Work as a team.**

   No one person can be responsible for a congregation's success; it takes the talent and dedication of a team of people working together. There are many models of partnership among lay and professional leaders in congregational life, but in every case, the sweet spot of success lies somewhere between taking all the power for ourselves and delegating everything to others. For example, lay leaders, clergy, and staff can collaborate to discuss the goals of a program and then divvy up the responsibilities to implement it.

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. 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*
2. 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.
3. *Paving the Road to Meaningful Young Adult Engagement* —URJ resource
4. *Engaging Families with Young Children*—URJ resource
5. *Reimagining Financial Support*—URJ resource

**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 most deeply into the conversation? How do we do that?

**Amy Asin** is the URJ's vice president and director of 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

**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 and director of Strengthening Congregations.

# Be Aware of the Sacred

## Why Congregational Leaders Shouldn't Aspire to Run Congregations Like Businesses

**by Amy Asin**

When I was a kid, people complimented the way I threw a baseball. Thanks to my uncles, I could zing one in there pretty well. "You throw like a boy," people would say. "I throw the right way," I'd reply. There were plenty of boys out there who didn't know how to throw a baseball.

I often think back to those days when I sit with congregational leaders and hear them say they want their congregation to run like a business. "You want the congregation to run the right way," I say back.

There are three fundamental problems with congregational leaders wanting to run their communities like businesses:

1. **Running a congregation like a business doesn't necessarily mean running it well.**

   Lots of businesses out there are poorly run. In the United States, 25,227 businesses filed for bankruptcy in the 12-month period ending June 30, 2016. Let's try not to operate the way they do!

2. **A congregation's ultimate objective is sacred and different from a typical business's goal.**

   Unlike a regular business, the mission of a congregation is sacred. People bring their entire selves to congregational life and bare their souls in congregations every day. We celebrate births and sit together in mourning. While a congregation has budgets, organizational charts, and processes and procedures, congregational leaders must utilize these "business tools" in a unique way.

   Business goals such as generating profits or balancing budgets are only secondary to a congregation's ultimate objectives: creating Jewish communities that heal people and repair the world. Everything we do must be measured against these sacred, mission-driven objectives first—and only then do the objectives of financial sustainability and excellent practice come in. When a rabbi gets a call to go to the hospital, unit costs are not on her mind, nor should they be. The sacred purpose of the work drives action, and it must also drive decision-making. Otherwise, the fastest way to balance a budget is to close the congregation.

   Practically, this means that when we look to cut budgets or invest dollars, we must ask the question: How will this impact our ability to achieve our mission now and in the long-term? My favorite example of this issue is congregations that see their early childhood programs as profit centers. The only questions they ask their early childhood director are, "How many children are enrolled, and how much are you contributing to operations?" These are good business questions, but they don't take into consideration the fundamental truth that families enrolled in early childhood programs are the future of the congregation and of the Jewish people. While cutting dollars from the program's budget or expecting it to generate more cash might seem like good business practice in the short-run, it could be detrimental to the future of the congregation.

3. **Congregations are more complex organizations than businesses.**

   Congregations cannot simply be managed like businesses because they are a special case of community-based organizations. This means that unlike the United Way, your local food bank, or Jewish Family Services, the users of the organization are the same people who fund and lead it. This creates multi-layered relationships that are extremely complex to manage.

The rabbi who officiated at your wedding and children's *b'nai mitzvah* or the cantor whose voice is seared into your heart is also the one who sits next to you at your Shabbat table. The educator who took you by the arm when you cried about your child's health issues is also negotiating his contract with you. The executive director who compassionately offered you dues relief without asking a single question is also the one who disagrees with you at a board meeting.

This is true for lay leaders, as well—we pray next to one another in pews, *kvell* together when our children sing in choir, argue about critical issues facing the congregation, and solicit one another for donations. To be able to separate one layer of these relationships from another is almost impossible, yet we are subjected to them every day.

The unique goals of a congregation and the complex relationships among its members mean that special consideration needs to be given to the way it is operated, beyond the practices of a standard business.

Just as throwing a ball "like a boy" isn't equivalent to throwing it "the right way," even our most sophisticated business leaders are forced to shift their perspectives and approaches in order to run a congregation "the right way."

**Additional Resources:**

1. "8 Principles that Drive Strong Congregations," by Amy Asin

**Discussion Guide:**

1. What is sacred for you about the work (volunteer or paid) that you do for your congregation?
2. What are the sacred moments in congregational life that make it different from a typical non-profit or Jewish organization?
3. Given the sacred purpose of your work and the work of the congregation, what has to run well in order for the congregation to be effective in achieving its purpose?
4. In what situations might you make decisions that are different because you are not a business? What is the advantage of this? What is the risk?

**Amy Asin** is the URJ's vice president and director of Strengthening Congregations.

# 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, at URJ Community events, 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.

In this case, it might be that the best principle was to lower barriers to attending a program. While the local bookstore was perfect for another congregation, in your community a park or a coffee shop might be better. Alternatively, the best principle might have been to find the person with the right skills and stature in the community to lead programming for families with young children. While this congregation's rabbi might be terrific at interacting with young children, your rabbi might have other strengths. Therefore, your community's implementation of this principle might be to have an engaging lay leader or a beloved teacher lead story time at the local park.

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, and reimagining financial support. We will continue to publish guides in other areas of congregational life. 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.

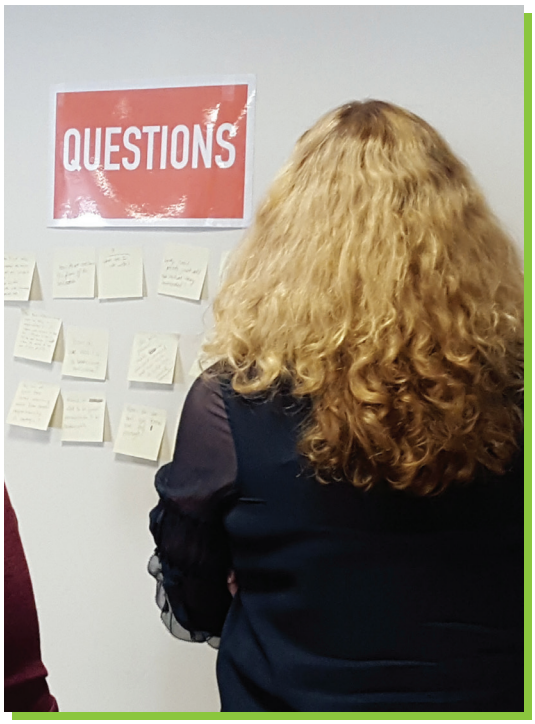
**Additional Resources:**

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 wish you knew 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 that 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 but each through a different practice.

**Amy Asin** is the URJ's vice president and director of Strengthening Congregations.




# Experiment

## Creating a Culture of Experimentation

**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 and a former URJ Scholar, 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, PARC blog

**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? 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.

# Bring Participants into the Process

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

**by Cathy Rolland, RJE**

Imagine the sight of dozens of face-painted children and the smell of barbeque. 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,"—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. Write each type of stakeholder on the Post-it sheet as a table (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.

# 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 and director of 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 and director of Strengthening Congregations.

# Work as a Team

## 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, communication, transparency, confidentiality, and reflection are the tools we use to build and nurture sacred partnerships. 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. "Four Ways to Succeed as a Congregational Leader," by Lisa Lieberman Barzilai, RJE, *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.

# Work as a Team

*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 and Retreat 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. 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.

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


# Work as a Team

## Do You Work Here? Volunteers as Consultants and Facilitators

**by Gila Hadani Ward**

There was a time when congregational leadership roles were clearly defined. Staff members served one role and volunteers served another. When an "expert" was needed, congregations either turned to outside consultants or, if they were part of a denominational movement, they called the movement office to ask, "Who on your staff can work with our synagogue?"

Times have changed.

Although congregations still seek outside experts to work with congregations (and the Union for Reform Judaism (URJ) provides them), we also are training increasing numbers of volunteers to offer consultation services to leaders within our network of nearly 900 member congregations across North America. These volunteers are engaged members of our congregations whose backgrounds and paths to congregational leadership vary. Whether they're congregational presidents, consultants in their professional lives, or involved in Jewish youth, education, or camping initiatives, what unites them is a love of the Reform Movement, a commitment to synagogue life, and a desire to contribute their time and talents to better our Jewish communities.

Annually, the URJ offers training for lay leaders who wish to work with congregations in different capacities. For example, some lay leaders receive training to facilitate URJ board workshops for congregations. After the training, the volunteers are matched with a congregation and spend approximately three months working exclusively with its leaders to craft a workshop or retreat tailored to the community's specific needs. The volunteer facilitators' efforts ultimately help congregations' leaders identify and commit to action steps for the short- and long-term future.

Lay leaders' work as facilitators in the congregational arena negates long-held assumptions about volunteers and reshapes our work with them. It also offers these important lessons, which congregations can reflect upon with regard to their lay-professional partnerships:

- **Experts are not necessarily people you pay.** The URJ regularly draws on the talents and expertise of volunteers. Not only do they possess a wealth of professional talent, but they also bring years of volunteer experience in synagogue life to the table—as congregational presidents, board members, and people committed to Jewish causes.
- **Volunteers are accountable and can maintain the quality control an organization expects.** In our work, expectations are clear for both lay leaders and professionals, and are outlined and detailed before volunteers sign on for their tasks. Further, volunteers are evaluated and expected to participate in ongoing learning and training, creating accountability like what is expected of staff members performing similar tasks. As part of the process, our volunteers are paired with a coach, who guides them through the various aspects of their responsibilities. The coach also serves as a sounding board and a "critical friend," someone who provides constructive feedback. This guidance, like support provided to professional staff, also helps ensure lay leaders have the tools to deliver at the level the organization expects.
- **A rich lay-staff partnership is critical to the success of our work.** We know the synergy between professional staff and volunteers is extremely important to synagogues, and our first-hand experience

reinforces this assumption. In the study "The Development of Professional Leadership in the Jewish Community," Stephen Dobbs, Gary Tobin, and Zev Hymowitz assert, "Professional staff and lay leaders and volunteers commit themselves to a shared vision, partnership, and an effective working relationship. Both parties regard the other with respect and understanding of their respective roles in the organization and the community. Work gets done without irritating concerns about who is in charge or who gets credit because the common good requires and enlists everyone's participation and contribution."

Increasingly, Reform congregations are benefiting from the knowledge of wise, energetic, and hard-working lay leaders. We have tapped into the expertise and experience of Reform Movement volunteers not only as URJ Board Workshop facilitators, but also as Membership Engagement Ambassadors, leaders of URJ Communities, and mentors for the URJ Congregational Benchmarking and Assessment Project. These partnerships enable us to strengthen Jewish communities and build congregations that transform the lives of the people who encounter them, ultimately moving us closer to creating a world of wholeness, compassion, and justice.

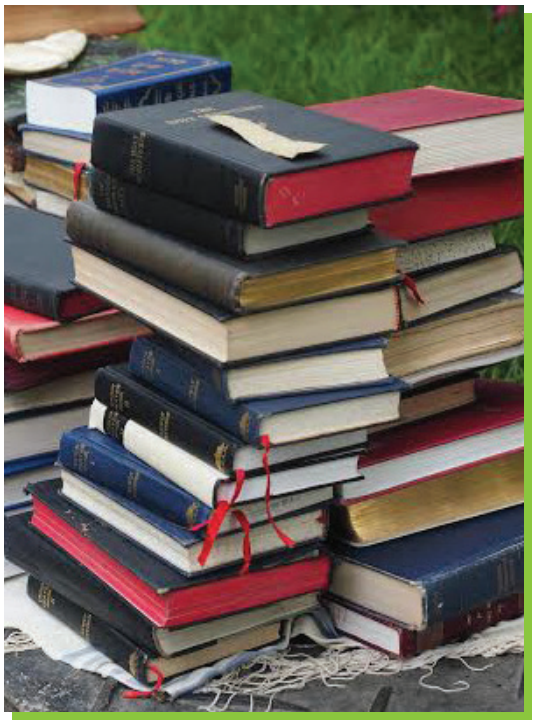
**Additional Resources:**

1. "How Jewish Volunteering Helped Me Find the Center of Importance in My Life," by Bruce Josephy, *Inside Leadership*
2. "How Do You Cultivate Lay Leadership?" by Timothy Siburg, *Ministry Matters*
3. *Navigating the Lay-Professional Relationship,* The Associated—Jewish Community Federation of Baltimore.

**Discussion Guide:**

1. Where are there needs in your congregation that could be filled by the work of trained volunteers?
2. Do you have a sense of the interests and talents of congregants in your synagogue? How would you go about finding out?
3. How do you create a system of training and accountability?
4. Do you currently evaluate volunteer performance?
    a. Are goals and/or expectations set out initially for volunteers?
    b. Who does the ongoing evaluation?
    c. Do you give suggestions for growth to volunteers?
    d. Do you appropriately thank volunteers?

**Gila Hadani Ward** is the URJ's director of Lay Resources.



# Transition Management

## 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 the URJ's Strengthening Congregations team, Rabbi David Fine 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'nai 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 recommitment and reengagement and, as a result, a congregational family that is energized, vigorous, and renewed.

**Additional Resources:**

1. A comprehensive resource on transition management will be issued in 2017.
2. The URJ's Transition Management team, Rabbi Janet Offel, Rabbi David Fine, and Rabbi Paula Feldstein, are available to assist congregations with inquiries about transition management.
3. The Senior/Solo Rabbinic Transition group in The Tent.

**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.

# Transition Management

## 8 Tips for Managing Your Congregation's Rabbinic Transition

**by Rabbi Janet Offel**

At some point, every congregation faces a time of rabbinic transition—and the process is inevitably an emotional one.

As author William Bridges notes in his book *Managing Transitions: Making the Most of Change*, those undergoing such a change will have to say goodbye to what used to be and then experience a neutral phase before they can embark on a new beginning.

In a synagogue, congregants are likely to progress differently through the phases of transition.

For some, the transition will bring about hopeful feelings of welcoming a new rabbi; others will face the sadness of saying goodbye to the previous rabbi; and still others will find themselves uncertain about the whole thing, lingering in a neutral phase between the two.

How can congregational leaders effectively manage these various emotions?

The following tips include insight from David Goldman, executive director of Congregation Emanu-El in San Francisco, CA, and a former lay leader who served as co-chair of the congregation's rabbinic search, and Connell Saltzman, past president of Temple Emanuel in Denver, CO, and a past co-chair of its senior rabbinic search committee. Together, we presented a session at the 2015 URJ Biennial about important lessons we've all learned about the rabbinic transition process.

1. **Try to plan as early as possible.**

   This is, of course, easier to do when the outgoing clergy member gives ample notice (more than one year is ideal), allowing congregational leaders to start planning for the transition far in advance. When talking to your rabbi about retirement, be gentle but try to set a date well in advance. Taking this emotional conversation off of the table will assist in a smooth transition in the final years.

2. **Embrace opportunities during transition.**

   A rabbinic transition can provide the opportunity for new beginnings, so allow the congregation to reflect about what has been going well in addition to exploring areas for growth. Consider utilizing facilitated focus groups and well-designed surveys, and include the conclusions in your search committee's deliberations. You might find that some of the issues can be addressed immediately, while others are included in strategic planning for the future.

3. **Involve senior staff and other clergy in the transition…**

   It's important to involve key congregational players in the transition, and communicating frequently about how the process is progressing will both foster buy-in and help the congregation deal with emotions related to the transition. This includes offering senior staff, other clergy, and key congregational stakeholders (such as past presidents and/or major donors and the synagogue's board) the opportunity to meet finalist candidates when they come for their onsite visits. You'll also want to provide plenty of opportunities to say goodbye to the outgoing rabbi and to meet the incoming one.

4. **…but don't involve senior staff and other clergy as members of the search committee.**

   Involving key stakeholders in the process does not mean that they should be a part of the search committee!

Staff shouldn't be in a position to hire their own boss but their insights can be helpful as the final decision is being made. Create opportunities for the finalists to meet individually with key staff members during their visits. After all, they're the ones who will be working with the new rabbi day in and day out.

5. **Find the balance between old and new.**

   When Temple Emanuel's beloved rabbi retired, congregational leaders wanted to maintain his institutional knowledge but also avoid making their new rabbi feel like he was in the shadows of his predecessor. Their strategy during the first year was to prioritize their new rabbi's introduction to and engagement in the congregation; during the second year, the new rabbi became more engaged with the large metropolitan community. The retiring rabbi remained available to answer questions but did so in a low-key, non-public way; he also started stepping out of most lifecycle events, aside from funerals, and including the new rabbi whenever possible so that families could establish a relationship for the future.

6. **Don't leave relationship-building to chance.**

   Relationship-building takes time and effort, so you can't expect congregants, staff, or leaders to feel an instant connection to the new rabbi; you'll need to invest energy into making these connections happen. Make a point to facilitate team-building exercises within the leadership and to create engagement opportunities for the entire congregation.

7. **Meet people where they are.**

   Not everyone will be on the same page about the change, and transition isn't about changing people's minds. The transition leaders' job is to let staff, clergy, lay leaders, and congregants know that their voices are being heard and to help them to become comfortable with the change over time.

8. **Turn to a professional.**

   Is your congregation undergoing a clergy transition? The Central Conference of American Rabbis and American Conference of Cantors provide free placement services to URJ member congregations, and the URJ's transition management directors are available to assist congregations through the journey of clergy transition.

**Additional Resources:**

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3. The Senior/Solo Rabbinic Transition group in The Tent.

**Discussion Guide:**

1. If/when your rabbi retires:
   - How will it feel to you personally?
   - How do you think other members of your congregation will react to the rabbi's departure?
   - Are there some cohorts that will be more upset than others? Why? Why not?
2. During rabbinic transition in your congregation:
   - Who has the most to lose when your rabbi leaves? Why?
   - Who will see this as an opportunity and embrace the change most quickly?
   - How do you manage the transition and bring everyone along on the journey, both those who are going to be mourning the departure of the rabbi and those who are embracing the change more quickly?

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

# Transition Management

## *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 and as chair of the URJ San Francisco Bay Area Community.

# Notes

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