MOVING TO THE LEADING EDGE: VOLUME 2

Leadership and Governance

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 risks 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 issues of leadership and governance. The myriad inquiries the URJ Knowledge Network team has received about these topics, and the many discussions revolving around them in the URJ's online collaboration platform, The Tent, have shown us that leaders of 21st century congregations are constantly looking to learn more about these topics. 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

The photos used throughout this guide are courtesy of the URJ and the following contributors (in order of appearance):

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The Future of Reform Judaism: How Can We Lead in Challenging Times?

by Marty Linsky

The challenges facing Reform Judaism may feel unique to the Jewish community, but they reflect larger forces sweeping through society.

In the Jewish world, the Reform Movement faces issues that are all too familiar: the high rate of intermarriage; the pull of other movements, including Orthodoxy and Chabad; and the disinclination of Jewish millennials, like their non-Jewish peers, to identify with institutions of any kind, particularly the traditional ones that were part of their childhood.

In the broader community, we are in the midst of a period unlike any before in our lifetimes. Change—and rapid change, at that—is a constant, with all the consequences attendant to it. The future is uncertain and unpredictable, and decisions must be made with inadequate information.

If you're reading this, it's likely because you care deeply about the future of the Reform Movement. If you had figured out how to ensure its robust continuation, you'd presumably be doing it already rather than reading this article! By virtue of your involvement with the Reform Movement as an institution, you are, in some profound way, searching without a clear path forward.

And yet, ironically, you are among the best and the brightest the movement has to offer and to rely upon for its survival.

Where does that leave us?

For me, this picture says that the leadership style, content, and perspective that created and nurtured the Reform Movement since its inception will not be the same as what it needs to move it forward in these uncertain times.

As I see it, the two critical elements of leadership for these uncertain times are: (1) the will to adapt to new realities, and (2) the courage to take responsibility for inventing the future.

Adaptation is difficult because it means letting go of practices, ways of being, behaviors, and even beliefs that have previously served you well. Of course, not all of them must be left behind, but choosing which ones to abandon can be agonizing.

Taking responsibility for inventing the future is difficult, too, because it means acknowledging that, with due respect, the people in positions of authority do not have all the answers. They do not know with any certainty what the Promised Land looks like or how to take us there.

For starters, then, do not look to me or any other so-called scholars or experts or authority figures for the answers.

Begin by looking in the mirror.

Ask yourself two questions: First, what have you done, or not done, that has contributed to the current challenges the movement faces? I'm sure you have done lots of things that have helped, but we are all co-creators of our realities. This means that if you are part of the current reality of the Movement, then you are doing—or not doing—something that has helped to create the problems the movement now faces.

Second, what have you been unwilling to do that might have made more progress toward the sustainability of the movement? What are your constraints, and which of them are you willing to address in order to make more progress?

After identifying and acknowledging your role, next think about what new leadership for the movement might look like under these conditions of constant change and future uncertainty.

Let me briefly suggest six elements of what new leadership—your new leadership—might look like under these circumstances:

1. Adapt instead of just executing.
2. Run experiments instead of just solving problems.
3. Invent new practices instead of just searching for best practices.
4. Orchestrate conflict instead of just resolving it.
5. Practice interdependence instead of just relying on yourself.
6. Take care of yourself instead of just sacrificing your physical and emotional wellbeing for the cause.

I'm not suggesting you stop doing everything you've been doing and start from scratch. Rather, I'm urging you to have the courage and the will to tweak your own leadership practices, your own behaviors—wherever you are operating from, whatever role you play, and whatever your title—to address the current challenges facing the Reform Movement. There is a lot of truth in the cliché, as you've heard Jewish musician Dan Nichols sing it, "If you do what you've always done, you'll get what you've always gotten."

The Reform Movement is full of talent. The issue is not capacity; the issue is courage and will. You can begin today.

Additional Resources and Discussion Guide:

- *The 2015–16 Scholar Series on Leadership*—URJ resource and discussion guide

Marty Linsky is a faculty member of the Harvard Kennedy School of Government and a co-founder of Cambridge Leadership Associates.

Leading 21st Century Congregations

What Keeps Congregational Leaders Up at Night

by Michael H. Goldberg

If you devote your volunteer time or your professional career to a synagogue, what keeps you up at night? What do your concerns, as congregational leaders, tell us about the contemporary Jewish landscape?

The Union for Reform Judaism's primary contact for congregational leaders, the URJ Knowledge Network team, fields dozens of calls and emails from congregational leaders each month. This small team of dedicated professionals, who collectively have more than 30 years of experience working with synagogue staff and lay leaders, responds with information, guidance, resources, and access to the vast network of URJ staff, Reform professional organizations, and affiliated congregations.

I looked at nearly 3,000 questions (2,658 to be exact) that synagogue leaders and others posed to the URJ Knowledge Network team during 2015 and 2016. The questions came from well over 500 different congregations located all over North America, ranging in size from a few dozen members to thousands.

I learned that these four topics—more than others—are on the minds of today's congregational leaders.

1. **Twentieth-century governance models aren't working in twenty-first century congregations. Synagogue leaders are hungry for change.**

   Questions relating to governance account for nine percent of all inquiries made of the URJ Knowledge Network team. Many synagogues have bylaws that haven't been updated in decades, and the synagogues are different institutions today than they were 30 or 20 (or even 10) years ago. The governance models that helped these congregations thrive in the past are not nimble enough to meet the needs of current and future members.

   Change can come in many forms—reducing the number of board seats, empowering task forces and ad hoc committees to tackle new challenges, promoting and training for a culture of sacred partnership—but more and more, congregations are concluding that today's leaders stuck with yesterday's rules can't lead tomorrow's synagogues.

2. **Clergy transition is critical and complex. Synagogue leaders can't tackle it on their own—and they don't have to.**

   Nine percent of all questions we received since 2015 related to clergy, with more than half of those focused on the practical ins and outs—salary surveys, contract models, policies and procedures—of hiring a new rabbi. All transition is difficult, but a change of the senior or solo rabbi is particularly challenging because much of a congregation's spiritual, educational, and financial success is tied to the talents and personality of the person in that role.

   A good transition builds on a sense of sacred partnership between clergy and lay leaders, with both sides recognizing that even the most mundane (and occasionally contentious) aspects of hiring a new rabbi are, at their core, holy acts. That relationship is mirrored in the partnership among the URJ, the Central Conference of American Rabbis (CCAR), and Hebrew Union College–Jewish Institute of Religion. The three founding institutions of the Reform Movement all play key roles in the process. Congregations seek out and value this support. When it comes to such a critical decision in the life of a synagogue, the Reform Movement matters.

3. **The changing nature of synagogue membership challenges congregational leaders to understand revenue in innovative ways.**

   In total, the number of questions answered by the Knowledge Network team rose by nearly seven percent in 2016 over 2015. The number of questions related to finance and fundraising, however, rose by 62 percent.

   Congregations are seeking alternative dues models, launching or reinvigorating legacy and endowment campaigns, and making important decisions to align their budgets with their missions and values. Synagogue leaders are building and enhancing their financial literacy and finding revenue models to keep pace with the shifting landscape of synagogue membership. They also are recognizing that no revenue model will succeed unless it's built on relationships that connect people to Jewish life and to one another.

4. **Judaism is compelling to a wide variety of individuals, and congregational leaders should be attuned to helping each one find a spiritual home in a Reform synagogue.**

   Four percent of questions answered by the Knowledge Network team since 2015 address membership. Many of these inquiries come from congregational leaders looking for ways to bring in new members. Over the same period, nearly 16 percent of all questions came from people who are not affiliated with URJ-member (or any) congregations.

   How can synagogues find new members? Look to the seekers. Some are exploring conversion. Others have questions about what Reform Jews believe and do. Still others are looking for clergy to officiate at lifecycle events—most often an interfaith couple that doesn't have a synagogue to call their own.

   In every case, people are looking for a connection to Judaism. Frequently, the Knowledge Network team can't meet their needs, but we can acknowledge and validate the connections they're seeking. Most important, we can encourage them to reach out to a nearby synagogue, where they will encounter the sacred work of the congregational leaders with whom the Knowledge Network team is honored and privileged to work every day.

Additional Resources:

1. URJ Online Learning Series on Governance
2. "Managing Change: The Only Constant in Today's World," by Rabbi Janet Offel, *Inside Leadership*
3. "8 Tips for Managing Your Congregation's Rabbinic Transition," by Rabbi Janet Offel, *eJewish Philanthropy*
4. URJ Online Learning Series on Creating a Culture of Philanthropy
5. Audacious Hospitality Toolkit—URJ resource

Discussion Guide:

1. Do the four challenges identified in the article resonate with you and your congregation? How are you addressing them?
2. Analyzing data from Knowledge Network inquiries helps the URJ create resources and programs that address the needs of congregational leaders. What data are you collecting about the members of your congregation? How can this information help your congregation better connect people to Jewish life and to one another?
3. How can you benefit from knowing that other congregations are facing the same challenges as yours?

Michael Goldberg is the URJ's director of operations of Strengthening Congregations.

Leading 21st Century Congregations

4 Concepts Every Congregational Leader Needs to Embrace

by Lisa Lieberman Barzilai, RJE

The Union for Reform Judaism's Leadership Institute seeks to inspire sacred action in our congregations by supporting and working with congregational leaders throughout their leadership journey. Whether you're new to leadership, a longtime veteran, or haven't yet entered the leadership ranks, you can have an impact on your congregation.

Through our work, we have learned that there are four key concepts that all leaders—lay or professional, emerging or experienced—need to embrace.

1. **Leadership is a set of behaviors, not a position.**

   As part of the URJ Scholar Series on Leadership, Marty Linsky, faculty member at the Harvard Kennedy School of Government, teaches that leadership is a set of behaviors, not a position or role. In other words, leadership is a set of verbs, not a noun. Some of the behaviors in which leaders engage include listening to others, bringing people together for discussion, seeking consensus, creating shared vision and goals, and being nimble and flexible.

   Change is the new constant, so leaders must continuously hone new skills to stay relevant and engaging and to meet the changing demands of their congregations. At the URJ, we strive to keep our finger on the pulse of innovation in the field of leadership development so we can help leaders strengthen the various behaviors and skills necessary for them to be effective and dynamic.

2. **Leadership in congregational life is unique.**

   Congregational leaders are not only trying to run successful and sustainable institutions; they are also nurturing souls and building a spiritual home for their community, where people can grow. Therefore, while congregational leaders need to hone traditional skills such as planning, managing, budgeting, and programming, they also need to master additional, distinctive skills.

   Judaism centers our spiritual community, and so it is essential that congregational leaders learn to use Jewish texts and values in all aspects of their work. They should use these texts and values not only for learning, but also place them at the core of decision making, community-building, and mission development. Each leader must define his or her personal Torah of leadership—the set of core values that guides this individual's actions in leadership and daily life. These values will evolve throughout the course of one's leadership journey, and through continued exploration of Jewish texts and values. Articulating a personal Torah of leadership through the framework of our sacred Jewish texts serves as a foundation to one's leadership, helping define the holy in each leader's work and the purpose in their actions. Helping leaders understand their personal Torah of leadership is a priority in all facets of the URJ Leadership Institute.

3. **Sacred partnerships are imperative in building a congregational community.**

   Congregational leaders are blessed to work with sacred partners who come together for the sake of the community. Just as Moses had Aaron and Miriam to help shoulder the responsibility, congregational leaders

have partners on whom they can rely. A congregation's size, structure, culture, and the leader's specific role will determine the best partners from among staff members, lay leaders, and congregants who are not yet holding leadership positions. Sacred partners can even come from other congregations and organizations.

However, sacred partnerships don't just happen; they must be built on a foundation of trust and shared expectations. Like a garden, these relationships must be cultivated so they don't wither and fade away. Learning about one another (both personally and professionally), understanding one another's leadership styles, and working on joint goals to create the best opportunities for success all require time and cannot be rushed.

4. **A network of support is critical to leadership development.**

   Learning is more powerful when done in a supportive network. Learning can come from an expert in the field as well as congregations that have experimented and found success or have encountered setbacks. At the URJ, we have seen that "one-to-many" consulting and learning can be more effective than in one-on-one settings. Therefore, in our leadership development programs, congregations support one another in their work.

Additional Resources:

1. Marty Linsky, "Leading in Challenging Times," in The 2015-16 URJ Scholar Series Resource, 29-44.
2. "Strong Congregational Leadership Requires Sacred Partnerships," by Lisa Lieberman Barzilai, RJE, *eJewish Philanthropy*

Discussion Guide:

Consider using this piece in your next board meeting with the following activity:

1. Break into small groups of no more than three or four people.
2. Designate a note-taker and discuss the following questions:
   - *Each person in the group should answer the following question:* What leadership behaviors do I exhibit?

     If you want to make this anonymous, you can give the participants index cards to write upon. The index cards should be placed in a single pile and read together.
   - What other behaviors do we need as a board in order to lead our congregation effectively?
   - How is being a congregational leader different from being a leader in other settings?
   - What is Jewish about my leadership at the congregation?
   - *Each person in the group should respond:* With whom do I have sacred partnerships in the work that I do on behalf of the congregation?
   - What networks do we have that support the work of our congregation?

3. The facilitator of this activity should place large pieces of paper around the room with the following titles:
    - Necessary Leadership Behaviors for Our Board
    - Jewish Leadership Is…
    - Sacred Partnerships
    - Our Networks of Support
4. Come together as a single group. The note-takers should write the notes from their sub-groups on the large pieces of paper as brief bullet points.
5. Provide each participant with six dot stickers. The stickers should be placed on the large pieces of paper as follows:
    - Three dots should be placed next the top leadership behaviors you have
    - One dot should be placed next to the response to "Jewish Leadership Is…" that most resonates with you
    - One dot should be placed next to the person or group with whom you would like to either build or strengthen a sacred partnership
    - One dot should be placed next to your congregation's support group that you identify as most important
6. After everyone places their dots, the facilitator will discuss trends she or he notices.
7. Based on the facilitator's observations, discuss as a group:
    - What are the two most important trends for your congregation?
    - In order to strengthen or improve on these trends, what are some actions that the leadership and/or entire congregation can take?

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

Collaboration

Collaboration Won't Kill Us, but Failing to Collaborate Might

by Rabbi Jay Henry Moses

"The Talmud says…"

Rabbis, teachers, and scholars alike often utter this misnomer. The next time your rabbi utters these words, please resist the temptation to interrupt her (although a silent smirk may do the trick).

You see, we are the heirs to not one but two Talmuds—the *Bavli* and the *Y'rushalmi*, symbols of the vibrant communities in Palestine and in Babylonia in Talmudic times. It is clear that these two communities lived in some tension with each other, at times disagreeing on matters of law, culture, and practice. But they also shared wisdom, teachings, and rulings with each other.

The key to the exchange was the Nechutei, travelers who would go back and forth between Bavel and *Eretz Yisrael* bringing queries on behalf of their own community's scholars and leaders for their foreign counterparts to answer; they also gathered the wisdom of the other community's sages to bring home for the enrichment of their teachers and colleagues.

The result? While we still have two Talmuds, they—and the communities that produced them—were both richer for having collaborated on the intellectual and spiritual project of refining Jewish law and lore.

Collaboration is a current buzzword in Jewish life, and while its connotations are largely positive, it is seldom practiced effectively.

Why don't congregations usually collaborate? Why should they? And how can leaders of congregations learn to collaborate well?

Congregations don't typically collaborate because our institutions are not built to collaborate. The structure and the culture of synagogues promote competition: Potential members go "synagogue shopping" and ultimately pay dues and contribute to the viability of one synagogue over all the others. Given that reality, rabbis and synagogue leaders understandably have their identities and egos (to say nothing of their budgets and salaries) tied up in the notion of being "better" and more attractive than other synagogues.

These dynamics are only deepened by the changing demographics of our community. The resources—members, revenue, energy, and prestige—are getting scarcer. Increasingly, the pressure to stand out from other congregations looks less like a healthy market indicator and more like an existential threat.

The natural response to that pressure is to hoard resources and redouble efforts to circle the wagons and preserve what you have.

So we have a double challenge—and a high bar to get over if collaboration is to win the day.

In response to the cultural and structural barriers we've inherited, I'd suggest that collaboration is an inherent good. As the Nechutei helped make both Talmuds richer texts (and both Jerusalem and Babylon stronger communities), so too can collaboration strengthen all congregations and communities. The diversity of ideas and perspectives it offers, as well as the scale that is possible with multiple stakeholders, are ingredients for a richer Jewish stew.

If collaboration is not self-evident as a greater good—or if that idea is accepted in principle but obscured in practice—the demographic reality now makes it a necessary tool for creative survival. Remaining siloed and in competition will hurt almost every congregation and our broader community. Some will simply not survive.

That's the why. But even if we accept that we *should* collaborate, the question of how to do it effectively is crucial—and not simple. A few principles can guide us:

- Check personal and institutional egos at the door.
- Stick with it! Real collaboration takes time.
- Take risks. Playing it safe usually leads nowhere.
- Recognize that collaboration involves loss. Be prepared to incur losses of autonomy, familiarity, and more—and help others deal with their losses, too.

The sages of ancient Jerusalem and Babylonia could not have foreseen that they were creating a culture that would guide our people through the next two millennia. They were just seeking truth and trying to lead their people through the next day, the next Shabbat, the next year. But they couldn't do it alone; they needed the Nechutei to broaden their thinking and connect them to larger possibilities.

The 21st century North American Jewish community needs Nechutei, too—bridge-builders who see the value of collaboration and help make it possible. Dare to be a Nechutei for your community—and maybe the Jews of future generations will be studying about you!

Additional Resources and Discussion Guide:

- *The 2015–16 Scholar Series on Leadership*—URJ resource and discussion guide

Rabbi Jay Moses is the vice president of the Wexner Foundation.

Collaboration

Why Congregational Competition Is a Good Thing

by Larry Glickman, FTA

Congregational leaders work tirelessly to make their communities strong and allow them to flourish *l'dor vador*, from generation to generation. That includes bringing new families into the congregation, which strengthens the community both relationally and financially.

Of course, the inverse of a family choosing to join one congregation is that they don't join the temple down the street or on the other side of town. As a result, our congregations often find themselves competing for every new member in the area.

This competitive spirit seems to extend to the online sphere. Responses to a survey of users in The Tent, the communication and collaboration platform for leaders in the Reform Movement, showed that congregational leaders are happy to use resources shared by other congregations, but are hesitant to share their own valuable intellectual property with neighboring congregations. They fear their ideas may be copied, that people may decide to join neighboring congregations instead, and that their congregational membership (and ultimately income) will decrease.

Rabbi Jay Moses, vice president of the Wexner Foundation, elaborates on why this is happening:

> Congregations don't typically collaborate because our institutions are not built to collaborate. The structure and culture of synagogues promote competition: Potential members go "synagogue shopping" and ultimately pay dues and contribute to the viability of one synagogue over all the others. Given that reality, rabbis and synagogue leaders understandably have their identities and egos (to say nothing of their budgets and salaries) tied up in the notion of being "better" and more attractive than other synagogues.

Collaboration may seem challenging and even in conflict with the sacred work we as synagogue leaders do to grow and strengthen our congregations. Lay and professional congregational leaders want to protect their valuable work so it will benefit their congregation.

But how far does this extend?

To what extent do we want all Jewish families in our area to join our congregation, even at the expense of neighboring congregations? Do we want other congregations to close? Do we want our vibrant Jewish community—with its varied voices and approaches to Reform Jewish life—to be of a single voice?

Perhaps that is an extreme eventuality, but healthy competition between congregations can, in fact, be a good thing. When organizations work in friendly competition with their neighbors, they stay sharp and focused, always moving forward. There are ways to be competitive and cooperative while still maintaining a strong sense of community and individuality—though it might entail a shift in mindset.

Here are three ways your congregation can start embracing other local Jewish institutions:

1. Work with other congregations to advertise affiliation. "Your four area congregations look forward to celebrating the High Holidays, and encourage you to affiliate with the congregation that best serves the needs of your family." That is a powerful statement that will speak to both the affiliated and unaffiliated Jews in your community.

2. If your congregation cannot offer potential members an early childhood program, recommend that they enroll their children in the early childhood program at the congregation down the street. Consider going one step further: Recommend they join that congregation because your congregation recognizes the value of families formally belonging to the sacred community where their children are being educated.
3. Work hard to create curriculum and programming… and then share it! That may feel like a scary proposition, but it can be incredibly rewarding and powerful. Sit down with leaders at other area congregations and discuss your plans for the upcoming year. Find areas of possible collaboration, including avoiding calendar conflicts. Learn from one another and find continued, shared inspiration.

If this seems daunting, that is understandable—but what if our organizations don't collaborate? What will happen if we silo ourselves?

In 2001, *The Telegraph* reported on the Jewish population of Afghanistan, which numbered just two Jews in the whole country. Yitzhak and Zebolan lived across a courtyard from each other, yet each maintained a synagogue of his own—and an intense, years-long dislike of the other.

"He is an old fool whose brains do not work properly," Zebolan said of Yitzhak.

"He is arrogant and ruthless," Yitzhak said of Zebolan.

Two Jews, each barred from the synagogue of his neighbor due to a disagreement over ownership of a 500-year-old Torah (which, as a result of the disagreement, was hidden away in a Taliban storage facility). Since the article's publication, Yitzhak has died and Zebolan continues to care for his synagogue alone. The synagogue across the street stands empty. There is no *minyan*.

Even if Yitzhak and Zebolan had found a way to utilize effective collaboration techniques, today Zebolan would still be the last Jew of Afghanistan. For a time, though—for a special and sacred time—they would have had a community. They would have been able to pray with and learn from each other. They would have been able to celebrate.

Jewish families belong to a temple to be part of a larger community, just as synagogues belong to a movement to be part of a larger community. We all want to be part of something bigger than ourselves, connected to a network with shared interests, passions, and goals—so collaborate with your neighbors, and become stronger together.

Additional Resources:

1. Rabbi Jay Moses, "Collaboration Won't Kill Us… but Failing to Collaborate Might," The 2015-16 URJ Scholar Series Resource, 45-67.
2. Marcus Warren, "The last two Jews in Kabul fight like cat and dog," *The Telegraph*, December 4, 2001.

Discussion Guide:

1. Read the entire *Telegraph* article about Zebolan and Yitzhak:
   - What are three things Zebolan and Yitzhak could have done in order to help create a sense of community between themselves?
   - What can you learn from that?

2. Refer back to Rabbi Jay Moses' thoughts on collaboration:

   "Our institutions are not built to collaborate. […] Rabbis and synagogue leaders have their identities and egos (to say nothing of their budgets and salaries) tied up in the notion of being 'better' and more attractive than other synagogues."

   - Do you agree with Rabbi Moses' assertion? Why or why not?
   - What are three examples of ways in which your congregation has collaborated with other Jewish institutions in your community during the last year?

3. Think of three times during the last year in which your congregation could have collaborated with other Jewish institutions in your community and did not:

   - Discuss what these opportunities could have been.
   - How would both (or all) institutions have benefitted from this collaboration?
   - What steps can your congregation take to seize such opportunities in the future?

Larry Glickman, FTA, is the URJ's director of network engagement and collaboration.

Collaboration

Congregational Perspective

How Our Four North Shore Preschools Became Collaborators

By Susie Wexler, Nancy Manewith, Leanne Nathan, and Cherene Radis

In a large metro area that offers families with young children many early childhood educational options, is collaboration among preschool directors possible? Can the leaders of these early childhood organizations view one another as collaborators and not as threats?

As participants in the Chicago Early Engagement Leadership Initiative (CEELI), we're proof the answer is "Yes!"

Supported by Crown Family Philanthropies and an anonymous funder, and directed by the Union for Reform Judaism (URJ), CEELI brings together a cross-denominational cohort of 16 Jewish early childhood organizations within the Chicago area, including the four organizations we lead, which are all in Chicago's North Shore.

Chicago's North Shore is a densely populated area with many early childhood educational options, including Jewish and secular, public and private, full- and part-day programming, and other schools that cater to niche populations. This breadth is well-represented in the organizations that the four of us lead, and hence, within the CEELI cohort. Each of the four of us leads different types of programs, including two non-denominational systems with multiple area locations (JCC Chicago and the Board of Jewish Education of Metropolitan Chicago), a Reform congregation school (B'nai Jehoshua Beth Elohim), and a Conservative Movement school (Moriah Early Childhood Center). This mix includes both full-day and half-day offerings.

Each of us joined CEELI in 2014. Amazingly, as CEELI's North Shore members, we all work within a 3.5-mile radius of each other. Although we are geographically close to one another and view one another's schools as competitors, we have come to realize, through our work with CEELI, that there is strength in numbers and we can accomplish more when we stand together.

Experts refer to this phenomenon as "coopertition," which Urban Dictionary defines as "a hybrid of cooperation and competition… the term coined for the teaming up of two rival companies." The concept is based on the idea of teams helping each other compete in a healthy manner, an approach that allows providers within a given industry to view others as resources. It's a means to raise quality for all—and CEELI is a perfect example of coopertition in action. Here are just a few ways it's benefitted us and our communities.

1. **We recognize our shared vision.**

   Through our work in CEELI, we've learned that we all offer quality programs to our families, and that value is increased exponentially when we all work cooperatively to define, articulate, and maintain best principles in Jewish early childhood education. Since CEELI brought us together around a shared vision, we've been able to redefine our interactions both as centers and as individuals.

2. **We've learned much about our community and our industry.**

   CEELI established regular meeting opportunities for directors, teaching staff, and board members from participating early childhood programs. These monthly meetings rotated through the schools, creating awareness of each of the participating programs by building familiarity with the environment, programming, and documentation unique to each school. CEELI also created opportunities for learning by bringing in experts to share knowledge about best principles in service industries.

3. **We've started tackling shared problems together.**

   We've developed a greater appreciation for the factors that affect us equally, and we've identified areas for advocacy and further professional development. By problem-solving together, we expanded and deepened our relationships, we came to know one another as individuals, and we gained respect for one another as professionals. Over time, we developed trust and felt safe sharing our authentic concerns about issues such as hiring and staff retention, professionalism within the field, institutional support, financial pressures, supportive technologies, and more.

4. **We've stopped seeing each other as competitors.**

   Through this collaborative process, we stopped perceiving one another as competitors vying for students. Instead, we now view ourselves as sharing an investment in high quality Jewish early childhood education. We shifted our approach from interviewing prospective families for enrollment in our own school to seeking matches for families that will ensure their engagement in Jewish programming that's truly right for them.

5. **We've developed personal and professional relationships.**

   By approaching early childhood education through a lens of coopertition, we developed a deep appreciation for one another and the quality programming we each provide. We learned to look at the bigger picture, considering how we can advocate for one another, share resources, and work together to engage families with young children in our area. The result is we have seen an overall increase in the quality in our schools, programs, and family engagement, which has benefitted Jewish families as they embark on their early childhood education journeys.

   We encourage you to think about who's in your own backyard and how those whom you've considered competitors can be collaborators. In making this shift to joining forces with other organizations in your community, you'll open yourself—and your schools or congregations—up to infinite possibilities and resources.

Susie Wexler is the director of B'nai Jehoshua Beth Elohim early childhood program at the Chava Center. **Nancy Manewith** is the director of the Early Childhood Centers of the Board of Jewish Education of Metropolitan Chicago. **Leanne Nathan** is the director of JCC "Z" Frank Apachi Early Childhood. **Cherene Radis** is the director of the Moriah Early Childhood Center.

Values-Based Leadership

Becoming a Values-Based Leader

by Harry Kraemer

Becoming a values-based leader isn't about emulating a role model or a historic figure. Rather, your leadership must be rooted in who you are and what matters most to you.

In my life, I have tried to stay committed to values-based leadership. No matter what position I'm in, whether father, son, spouse, corporate executive, professor, or board member—or, for that matter, soccer coach, volunteer parent, or Sunday school teacher—I have focused on never losing sight of who I am and what matters most to me.

When you truly know yourself and what you stand for, it is much easier to know what to do in any situation. I believe it comes down to two things:

1. Do the right thing.
2. Do the best you can.

That may sound simple, but it's hardly simplistic. Doing the right thing is a lifelong challenge for us all. Fortunately, there are four guiding principles that can help you in the lifelong journey of values-based leadership:

1. **Self-reflection**

   You identify your values, what you stand for, and what matters most to you. To be a values-based leader, you must be willing to look within yourself through regular self-reflection and strive for greater self-awareness. After all, if you aren't self-reflective, how can you truly know yourself? If you don't know yourself, how can you lead yourself? If you cannot lead yourself, how can you lead others?

2. **Balance**

   Balance is the ability to see situations from multiple perspectives and differing viewpoints to gain a fuller understanding. You consider all sides and opinions with an open mind before coming to a conclusion. You seek to understand before being understood.

3. **True self-confidence**

   This means accepting yourself as you are at any point in time. Realizing that you are a work in progress, you recognize your strengths and your weaknesses, and you strive for continuous improvement. With true self-confidence, you know there will always be people who are more gifted, accomplished, and successful, but you're OK with who you are.

4. **Genuine humility**

   Humility enables you to remember who you are and where you came from, and it keeps life in perspective, particularly as you experience success in your career. In addition, it helps you value each person you encounter and treat everyone respectfully. When people ask you how you have achieved certain accomplishments, you realize that in addition to the fact that you have worked hard and have certain skill sets, your accomplishments are also a result of God-given talents.

By knowing yourself and your values, being committed to balance, and having true self-confidence and genuine humility, you can far more easily make decisions, no matter whether you're facing a crisis or an opportunity.

The real beauty of these four principles is that they can be applied by anyone, from the president of a country to the chief executive of a company, from the junior-most person on staff to the unpaid volunteer leader. You can always apply the principles of values-based leadership; you don't have to—or want to—wait until you have hundreds of people reporting to you. It is never too early or too late to become a values-based leader.

Good luck on your journey to becoming a values-based leader.

Additional Resources and Discussion Guide:

- A URJ Leadership Institute resource, based on the 2016-17 Scholar Series on Leadership, will be released in late 2017

Harry Kraemer is the former chairman and CEO of Baxter International and a Kellogg School of Management clinical professor of strategy.

Values-Based Leadership

When to Say "Yes" and When to Say "No" as a Jewish Leader

by Dr. Erica Brown

In my office is a decorative picture with the words "Become a possibilitarean." The idea that we "dwell in possibility," as Emily Dickinson once said, makes life and leadership exciting. Experimentation and innovation invite possibility, and one word seems to extend that invitation and respond to it best: Y-E-S.

Many professionals and volunteers in the Jewish nonprofit world suffer from leadership fatigue. One of the chief symptoms and causes of this problem is the same three-letter word: Y-E-S.

Many of us want to please. We want to be loved. We want to be the kind of people who say yes when asked. After all, we enter Jewish organizational life as professionals or volunteers in order to serve, and we serve when we say yes.

But when we say yes too many times and to too many responsibilities, we may find our energy and capacity dangerously thin. Instead of creating possibilities, we may compromise our ability to lead and influence others. Burnout awaits.

Yes can open up—and yes can shut down.

Are you saying yes when you really want to say no? The pressure to conform, comply, or contribute often steers well-meaning but overcommitted individuals to say what they don't really mean. It reminds me of a particularly prescient and short expression in the Talmud: "Rabbi Yohanan says, 'There is a yes that is like a no and a no that is like a yes.'" (BT *Bava Kamma* 93a). It's best to make sure you know what you're saying.

If you're a fundraiser or a recruiter, you live for a yes—and there's a way to expedite that answer. Professors Nicolas Gueguen and Alexandre Pascual conducted a study of what it took to get people on the street to give a charitable donation. The average rate of success was 10%, but when subjects were told they were free to accept or refuse, a striking 47.5% complied.

Asking alone is insufficient. What helped get people to yes was the possibility of and personal freedom to say no.

Five years later, the same researchers used a similar technique to find out the increased likelihood of people completing a survey if they had an opt-out clause. Not surprisingly, it worked again. This kind of language set up an exchange dynamic wherein the kindness of giving someone a choice was repaid, if you will, with the participant giving a positive answer.

Giving someone else a choice, in other words, empowers them and they will often reward you with an affirmation.

Giving someone a get-out clause may be a technique we need to more readily apply to the world of Jewish organizational life. The sense of choice it creates allows people to enter into leadership roles with greater consensuality. It also gives leaders the chance to say no. There will always be guilt attached to saying no, but perhaps it's time to reassess that guilt.

Many of the people who ask us to get involved, to give money, or to come to another meeting are not doing it because it is to our advantage but to theirs. This usually doesn't enhance our leadership sphere of influence. It diminishes it.

Here are seven questions to ask yourself when considering a leadership role:

1. Am I saying yes to satisfy myself or to satisfy someone else?
2. Is there anyone else who can do this more efficiently, more capably, or more willingly?
3. Am I uniquely situated for this role?
4. Will this role grow my talent and/or give me needed experience and skills?
5. Will saying yes help me better achieve my own leadership goals?
6. Is now the right time in my life to say yes?
7. Will I eventually resent saying yes?

If saying no is still hard, find a verbal narrative that helps you say it gracefully, namely by mentioning but ultimately bypassing yes. "I'd love to take this on some day. Now is not the right time for me," or "I'm really engaged in a leadership project that is important to me so I can't say yes to you right now," or "I think so-and-so is a better fit."

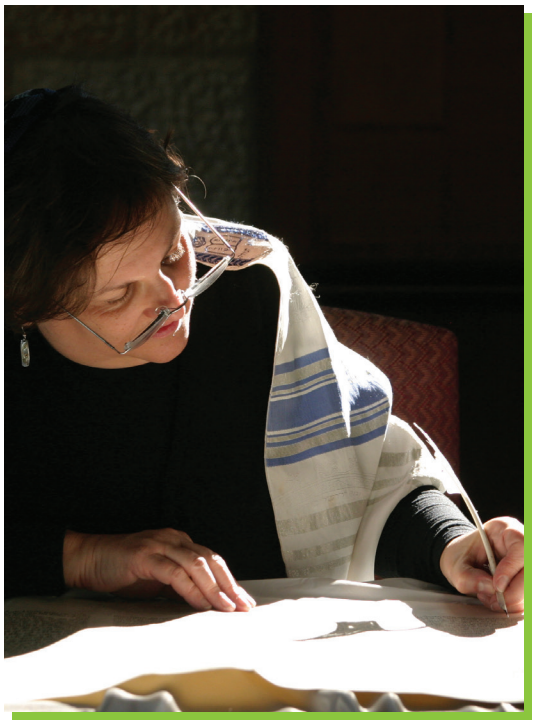
Say yes to too many people or responsibilities and you'll find that what you really care about is not getting enough time and space to live and grow.

My most important piece of advice to leaders: Say no so you can say yes to something bigger. That "bigger yes" will better grow your passion and compassion.

Additional Resources and Discussion Guide:

- A URJ Leadership Institute resource, based on the 2016-17 Scholar Series on Leadership, will be released in late 2017

Dr. Erica Brown is an associate professor at George Washington University and the director of its new Mayberg Center for Jewish Education and Leadership. She is also the author of eleven books and a weekly Torah blog.



Values-Based Leadership

Applying the Lessons of Mussar to Community Leadership

by Alan Morinis

For the past two decades, I've been writing about and teaching Mussar, a treasury of techniques and understandings that have evolved during the past 1,000 years to guide the individual soul to reach its highest potential. Because Mussar guides us toward higher possibilities, it is also entirely applicable in the realm of leadership. That's because leadership is a challenge, and being a good leader is even more of a challenge—and the biggest challenge of all to effective leadership is never the external circumstances, but rather the personal character of the leader, which is exactly what Mussar addresses.

To give you one example, let's take the quality of humility. Is that an inner trait you would you want to see in a leader? If you associate the word "humility" with someone who is meek or submissive, then it's hard to see how being humble would make for great leadership. But does Jewish tradition understand humility in that way? Clearly not, because the Torah tells us that the person who was more humble than any other person on the face of the earth was none other than Moses (Numbers 12:3).

Meek? Ask the Pharaoh. Submissive? Ask the rebellious Korach. Moses was a man of such chutzpah that he even argued with God, challenging God's wish to destroy the Jewish people after the sin of the Golden Calf.

Well, if a person can be humble and assertive at the same time, we need some more guidance from Jewish sources to be able to understand what this quality entails, and how it is revealed in our greatest leader of all time. Then we will be in a position to see how to apply the leadership lessons in our own community situations.

Much before Moses, right back when God was creating Adam, the verse quotes God as saying, "Let us make human beings in our image, after our likeness..." (Genesis 1:26).

That God speaks in the plural – "Let *us* make a human…."—did not escape the eyes of the Torah commentators, who had to wonder: Who is this "us"? Why doesn't God say, "I will make a human…"? Might God have had a partner in creation? That notion goes directly against the fundamental Jewish principle of monotheism, and so had to be rejected. But if there weren't multiple creators, to whom was God referring as "us"?

The medieval commentator Rashi tells us that before creating the first human being, God consulted with the angels. And in doing so, God gave us a lesson in humility, which means, in Rashi's words, "that the great should take counsel and ask permission from the small."

So here we get a distinctively Jewish leadership principle. A leader should be humble and make it a practice to consult others, even subordinates or people who know less and have less experience. Consulting others could be felt as a threat, and so it is pretty clear that only a person strong enough to take the risk to be humble is a person with a good deal of self-confidence.

But wait! How can that be? In order to be humble you have to be self-confident? We started by associating humility with meekness and diffidence, and so you can see how far from our starting point Jewish sources have guided not only our thinking but also our behavior.

I heard of that principle being put into action in an unexpected context. I had the good fortune to do graduate studies at Oxford University, where one of the colleges is called New College. It was founded in 1397 (note to self: If you think something will last, don't call it "new." The "new" building at my own college was built in 1733).

The story goes that in the mid-20th century, it was discovered that the giant oak beams in the New College dining hall were infested with beetles. Those beams ran 45 feet long and were thick around, not the kind of the thing you run down to pick up at your local lumber yard.

The college was in a quandary over how to replace the failing beams until one fellow suggested asking the college forester, the man responsible for keeping the grounds on the college's endowed lands.

They called this man from his work in the woods, and asked him if there were any oaks that could be used to save the dining hall.

He replied, "Well, sirs, we was wonderin' when you'd be askin'."

He explained that when the college was founded, a grove of oaks had been planted because it was known that oak beams always become beetly and replacement beams would be needed. This plan had been passed down from one forester to the next for 500 years, saying, "You don't cut them oaks. Them's for the College Hall."

Only when someone had the humility to consult with a subordinate was the problem solved. It took real humility and showed great leadership to do this.

This is but one example of applying Jewish values in leadership. We are heirs to a wise tradition. When we find our guiding principles in those sources, not only is leadership enhanced, the organizations and programs and, ultimately, the entire community benefit. The leadership then embodies and acts from the highest ideals that are articulated within our own tradition.

Additional Resources and Discussion Guide:

- A URJ Leadership Institute resource, based on the 2016-17 Scholar Series on Leadership, will be released in late 2017

Alan Morinis is the founder and dean of The Mussar Institute and an active interpreter of the teachings and practices of the Mussar tradition.

Leadership Development

How to Identify and Train Emerging Leaders at Your Congregation

by Rabbi Jason Fenster and Karen Sirota

In recent years, a number of studies have explored the benefits of dedicated leadership programs. In the corporate world, studies have shown that more than one-third of new hires have had little or no training, and nearly 20 percent of employees who quit within the first six months said it was because they didn't receive sufficient training.

It's a cautionary tale for the synagogue world, too.

Among the many responsibilities of lay leaders, cultivating a pipeline of vibrant, knowledgeable leaders is one of the most central—and ensures a worthy legacy. It leads to seamless leadership transitions and helps ensure the vitality of the congregation's future.

We at the URJ have spent several months working with congregations of all sizes to learn more about their leadership development programs and hearing from others about their interest in creating one. Our research and congregational conversations taught us that the following principles are important when training leaders:

Congregational leadership is a sacred task.

A synagogue leadership development program must continuously and intentionally emphasize what it means to be a Jewish leader, including how to fuse both the spiritual and practical, and how to connect to the sacredness of the work. Curriculum should be infused with references and thoughtful opportunities that ground the work in our historic traditions, guided by our sacred texts.

For example, "Leading with a Jewish Heart," a program developed by Temple Isaiah in Lafayette, CA, has used a triangular model to underscore their sacred work. The Jewish values form the base, and the core beliefs, group processes, institutional knowledge, and systems information are built upon that base.

Another great example is *Atidaynu* (Future Leaders), the leadership training and development program at Temple Sinai in Atlanta, GA. The program includes a hands-on examination of the congregation's Torah scroll to connect participants to its history and teachings, nuances of the scribe's style, and its relation.

Essential skills and visionary leadership are both taught and modeled.

Creating effective training for congregational leaders requires a delicate balance of subjects covered. Though basic subjects such as bylaws, budget, finances, governance, and communication are essential, it is important to also include more esoteric topics such as visionary leadership, change management, direction-setting, and member motivation.

It is important that the teaching of both these topic areas model effective leadership. Sessions should be carefully constructed to include pre-readings, appropriate agendas with realistic time expectations, opportunities for respectful conversation both in large and small group gatherings, and time to reflect on lessons learned. Aspects of these sessions should be later discussed to reinforce how they model good leadership.

Meaningful relationships deepen congregational engagement and commitment, making leadership a shared responsibility.

It has often been said that synagogue engagement is all about relationships. Connections lead to commitment and dedication to leadership, as well as to the understanding that leadership is a shared experience. At every juncture, leadership development training must include opportunities for participants to share their Jewish stories and personal reflections, and engage in small group conversations.

Atid (Future), the leadership program and part of the robust learning experience at Community Synagogue of Rye in Rye, NY, works to establish a trusting environment as participants share their Jewish journeys and engage in meaningful, targeted conversations. Participants establish a growing relationship with each other throughout the time spent together, and the curriculum is woven into these conversations—forming connections that often last beyond the confines of the sessions.

At Temple Sinai of Bergen County in Tenafly, NJ, their leadership program, Hineini (Here I Am / I Am Ready), demonstrates the importance of relationship-building. After a casual dinner, participants share personal stories and reflections related to the topic for the evening. These interactions build important connections among participants and to the community.

Leadership development is an ongoing process that should engage all leaders at all levels.

As leaders grow into new congregational positions, they need to continue learning. A robust leadership development program must not only include key curricular elements, but opportunities to support work and deepen skillsets as they move through new areas of leadership.

Additional Resources:

1. The URJ Emerging Leaders Resource
2. The Leadership Development group in The Tent.

Discussion Guide:

1. Describe a recent situation at your synagogue that required the skills of a great leader, either lay or professional.
   - What was the outcome of that situation?
   - How did the leader effectively resolve the situation? What skills and essential qualities were displayed by the leader?
   - If you were called upon to be that leader, what skills and understandings do you have that you would use to arrive at a resolution? Which additional skills would you need to acquire to be even more effective in the resolution?
2. Describe a Torah teaching that helps you better understand the challenges and/or honor of leadership.
   - How do these words inspire you?
   - How does this leadership message contribute to your personal growth?
   - How might you use this message to encourage others to become leaders and/or teach others about leadership?

3. Think about why you got involved in congregational leadership.
    - What is sacred for you about this work?
    - How do you and your leadership team make your work sacred (and, if you don't, what can you do)?
4. Think about the most important relationships you have in your synagogue community.
    - How did these relationships develop?
    - How have these relationships deepened your connection to your synagogue community and inspired you in your journey to leadership?
    - What strategies would you recommend to help others build similar, meaningful connections?

Jason Fenster had been a rabbinic intern with the URJ's Leadership Institute when he wrote this article. He has since been ordained and is now the associate rabbi at Congregation B'nai Jehoshua Beth Elohim in Deerfield, IL. **Karen Sirota** is the URJ's director of Large Congregations.

Leadership Development

Reflective Questions for Emerging Leaders to Explore

by Lisa Lieberman Barzilai, RJE

Leadership development is critical for any congregation that expects to thrive now and in the future. An excellent and effective leadership development program includes elements of both skill-building and learning about the congregational community, providing emerging leaders with opportunities to explore and develop in these areas. Every leader, new or veteran, must learn about and reflect upon certain overarching principles to prepare for a congregational leadership role. The URJ has created a resource of self-guided modules that can serve as the basis for a congregational leadership development program. Topics in the URJ Emerging Leaders Resource include mission and vision, leadership skills, personal leadership style, and goal setting, all presented through the lens of Jewish texts and values.

Though you might think the most critical components of the program would be in the list of topics to be studied, the most fundamental elements in any congregational leadership development efforts revolve around three reflective questions that should be explored and addressed regularly.

1. **What is my connection to my congregation?**

   Although everyone in a leadership development program likely understands their connection, when asked, most people offer a list of experiences that make them feel connected. Leaders need to be able to tell a story—their story—about being part of the congregational community. That story is more than a series of events; it's about the relationships built within a community that supports and nurtures souls. It's about feeling uplifted when in pain and about sustaining others in times of need. It's the ability to articulate this story that lies at the core of leadership development.

2. **With whom can I partner?**

   In Judaism, we take seriously the notion that we are not responsible for completing the work, but we cannot walk away from it either. Leaders must have partners in their work, and within the congregational setting; such partnerships contain an element of the sacred. At the URJ, we define sacred partnerships as follows:

   > *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. These partnerships are built and nurtured through Jewish values: mutual respect, trust, honesty, listening, communication, transparency, confidentiality, flexibility, and reflection.

   Throughout a leadership development program, emerging leaders should be exposed to current leaders, both lay volunteers and professional staff, within the congregation, who will be potential sacred partners when they step into their new roles. Throughout their tenure, leaders should continue to explore the meaning of sacred partnerships, noting that the Jewish values listed in the definition above are necessary building blocks for sacred partnerships to strengthen the congregation.

3. **What is my personal Torah of leadership?**

A "personal Torah of leadership" is a set of core values that guides an individual's actions in leadership and daily life. These values will evolve throughout the course of one's leadership journey and through continued exploration of Jewish texts and values. Articulating a personal Torah of leadership through the framework of our sacred Jewish texts serves as a foundation to one's leadership, helping define the holy in each leader's work and the purpose in their actions.

Leaders should be able to articulate the core values central to their own leadership and use them as a guide when making decisions and directing programs or processes. They should not only view these values through a secular prism but also within a Jewish framework—and continue to define and refine this personal Torah of leadership throughout their participation in a leadership development program.

These three questions support a process of reflection that will prove valuable to all leaders, whether veterans or first-timers, and should be considered by anyone seeking to become a leader in our 21st century congregations.

Additional Resources:

1. The URJ Emerging Leaders Resource
2. The URJ Leadership Institute is available to assist congregation in strengthening or developing a leadership development program.
3. The Leadership Development group in The Tent.
4. "Strong Congregational Leadership Requires Sacred Partnerships," by Lisa Lieberman Barzilai, RJE, *eJewish Philanthropy*
5. "Four Concepts Every Congregational Leader Needs to Embrace," by Lisa Lieberman Barzilai, RJE

Discussion Guide:

1. Why are these questions so important for congregational leaders?
2. Ask each person to respond to the following questions:
   a. How would you answer the three questions posed in the article?
   b. How do your responses to these questions help you to be a better congregational leader?
3. As a group, reflect on the responses shared.
   a. Based on these responses, what might be important for leadership development in your congregation?
   b. What are some next steps that the congregation can take to strengthen your current leadership development program or to create a leadership development program for your congregation?

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

Reimagining Financial Support

Congregational Perspective

How Building Community Helped Us Change Our Dues Model

by Dani Robbins

My career has taken me to multiple cities in several states, and each time I've moved, I've looked for a new religious home by calling around to local synagogues. I found it off-putting, however, when the people on the other end talked to me about money before they welcomed me or invited me to visit. By the third or fourth call, I had a bit of a chip on my shoulder about the way our congregations welcome prospective members.

Imagine my delight, then, in learning that my current congregation, Congregation Beth Tikvah, was considering changing its dues model—really turning it on its head. I've been reimagining the financial future of Jewish congregations for years, so I was thrilled to participate in the congregation's efforts to do so.

For years, Congregation Beth Tikvah, which was founded upon and employs egalitarian values in all its endeavors, has been moving toward a relationship-based model—one in which the congregation builds a community of enhanced relationships, both among members and with the congregation, moving away from fee-based dues and tickets. Although we didn't know it at the time, relational Judaism was the lens we used when we eliminated the committee that approved dues reductions, selected our new rabbi, and began to consider whether a new funding model was right for us.

Upon his arrival in 2011, Rabbi Rick Kellner helped us put relational thinking at the forefront of our actions and vocabulary, and encouraged us to adopt it within our community. Under his leadership, we expanded programming for young children and seniors, and finished building a new sanctuary and social hall, construction of which had begun before he arrived. Both efforts attracted new families, and our community grew.

Along the way, we found that our existing financial model no longer fit our needs. Eager to learn about alternatives, when the URJ announced its new Community of Practice (CoP), Reimagining Financial Support for Your 21st Century Congregation, we signed on. Launched in March 2013, the CoP enabled us to learn from one another, other congregations, and experts brought in by the URJ. Ours was one of 17 congregations in the two-year guided program, which included an in-person gathering, periodic webinars, individual check-ins, and shared resources.

Our CoP committee explored various financial models. We looked at our congregation's history and culture. We discussed definitions of "dues," "member," and "transaction." We challenged, argued, and debated one another, ultimately building consensus. Though we started out talking about money, we ended up talking about community. We studied congregations that implemented new models, reading their literature and interviewing their members. We talked about who we wanted to be and to what kind of community we wanted to belong. We held formal and informal gatherings to engage constituents. We wrote letters and articles. We sought and received feedback.

We learned that promoting engagement and providing connections among members are more vital than any funding discussion possibly could be. In fact, at one point, we committed to changing our language, and now are moving toward deepening relationships and engaging with one another, our congregation, and our faith. Our goal was no longer about changing congregational dues models; it was—and is—about changing our congregational culture. Finally, we made formal recommendations to our board and presentations to our fellow congregants, received suggestions, and revised our recommendations accordingly.

It was daunting, nonetheless, to recommend a process that potentially would allow people to participate in our congregation without supporting it financially. We knew various outcomes were possible: We could lose significant income, gain significant income, lose income but gain members, or lose members but gain income (though we all doubted that this last possibility would come to pass). We trusted that if we created a place and a space in which everyone belonged, something magical would happen, and everyone would, indeed, feel like they belong.

So we jumped, and the net appeared.

Our plan included changing our language to change our culture, evolving from the word "dues" to the term "membership commitment." Importantly, we provided guidance about the annual costs to sustain programming, as well as how people could give below, at, or above that level.

What happened? Some people gave less, and some people gave nothing but still joined, which also was part of the goal. Some people gave more, and some gave a lot more. One thing is for sure: We've left the transactional model behind. No one who calls our congregation to inquire about joining is told about dues.

We're not finished yet. Our movement toward relational Judaism laid the foundation for a culture of philanthropy that will continue to evolve. It remains to be seen whether we will need to introduce a more formal process to engage donors. For now, though, it's safe to say that our committee is delighted with where we are and where we're going. We are currently just one family shy of last year's membership numbers, with almost exactly the same income. We did it!

We changed our words. We changed our culture. But we didn't change our income.

Dani Robbins, a nonprofit leadership consultant, was part of the Reimagining Financial Support Community of Practice Committee at Congregation Beth Tikvah in Columbus, OH.

Notes

Notes

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