

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 nearly 850 congregations of the URJ, and I can tell you that there is significant innovation happening in synagogues across North America. The conventional wisdom has shifted. No longer are congregations waiting for the conveyor belt to deliver them new members. They realize that existing solely to sustain their institutions is not a long-term prospect for growth or even for survival.

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

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

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

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

In this volume, we have collected articles and discussion guides related to 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.

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Photos

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Introduction

The Four Best Principles of Congregational Governance

by Amy Asin

Throughout the years, the URJ has learned that questions about congregational governance [keep congregational leaders up at night](#). In fact, for the past four years, it has consistently been one of the top categories of questions asked to the URJ Knowledge Network team, generating approximately 10% of all questions we received. You've asked us:

1. How big should my board be?
2. Do I have to fill all of my committee chair positions?
3. How can we have better conversations at the board level that focus on relevant topics?
4. How can I find more leaders and people willing to serve?
5. How can I get people to step down from positions they've held for too long?
6. Why can't we attract more young people to our board?
7. Why can't we attract more young people to the *congregation*? (Yes, part of this answer lies in congregational governance!)

We heard you, and as a result, the URJ has developed [a set of new resources](#) and learning opportunities for leaders who want to change the way they govern their congregations. Your inquiries prompted our work, but they weren't the only reason we're investing in helping you make changes to governance.

According to conventional wisdom, congregations will look different in 10–15 years. If this is the case, we need leadership that can come together to actively create our future. Otherwise, we will be reacting passively to forces and trends, and are less likely to be successful.

In most congregations, our ability to consider the changes necessary to thrive both now and in the future is hampered by 20th-century governance practices still in place—including communities' purpose, structure and process, culture, and leadership development strategies. We aren't able to attract new leadership or confront new challenges because we are working in old ways.

To help you set the direction for the adaptive changes needed for your 21st-century congregation to thrive, we reflected on trends in nonprofit governance and on congregational case studies. We consolidated our learning into the following set of best principles for congregational governance—and the next sections of this resource will delve more deeply into each of these principles:

1. Ground the activity of your congregation and the decision-making of your leadership in your foundational statements, reinforcing your community's sacred purpose.

Your foundational statements—your mission, vision, and values statements—articulate the purpose and aspirations of your congregation, and they should ground and drive its work. Use them actively in setting priorities, allocating resources, and making policy decisions. They should reflect the sacred purpose of your community and be based in Jewish values.

Foundational statements should be viable for a significant period of time, but given the sweeping changes in our society throughout the last decade, it is appropriate to review them now, if you haven't done so recently.

2. Establish clear, mission-driven, and flexible organizational structure, processes, and culture to support your congregation in adapting to new challenges.

Form should follow function and the work being done should be aligned with your priorities. Because your priorities may change over time, your bylaws should be more minimalist than they may have been in the past, allowing for more flexibility.

Additionally, the size and structure of your board, executive committee, working groups, and task forces should be defined by the purpose each is trying to achieve. The roles of these groups and the individuals involved should be clear from the outset of any project or discussion. The work of all of these groups—including that of clergy and staff—should be balanced among management and fiduciary oversight, strategic thinking, and generative action. To enhance your work and reflect the tools available in most people's work environments, use technology for video conferencing, document sharing, project management, and the like.

3. Create a transparent, reflective, diverse, and positive leadership culture, emphasizing sacred partnership.

Self-reflective, approachable, and adaptive leadership that works in sacred partnership helps congregations thrive. Actively seek diverse views, approach conversations with honest curiosity, and be open to new ideas that might lead to change.

Ensure that your leadership meetings have clear goals and allow for true reflection. Additionally, offer your congregants a clear path to providing feedback to your leadership, as well as transparency into your decision-making processes.

Finally, embrace positivity by adopting a growth mindset and a culture of constructive and respectful disagreement.

4. Engage in ongoing leadership development.

Leadership in your congregation should be viewed as an enriching Jewish experience—one that has multiple paths and entry points. Invest in constant, deliberate, and forward-thinking leadership development to create a pipeline of leaders who work in sacred partnership. Rotate your leadership as much as possible, and intentionally plan your leadership succession.

The future of congregational life depends on good governance in congregations. We need to be able to let go of old assumptions and shift from a control mindset to a growth mindset.

No congregation gets all of these principles right all the time, but we should all be starting the process of moving in a direction to take control of our future—and we at the URJ are ready to work with you to make that happen.

Additional Resources:

1. [URJ Resources: Governing Your 21st-Century Congregation](#)

Discussion Guide:

1. Reflect about your congregation's foundational statements:
 - What are the ideas, principles, and objectives that your congregation declares make you unique? Do you think that the rest of the congregation knows what the mission, vision, and values of the congregation are?
 - How do the mission, vision, and values of the congregation play out in the everyday life of the congregation, its people, and its programs? How are your mission, vision, and values guiding the way you work as a leadership team?
2. Reflect about your congregation's governance structure:
 - Does your congregation have the right structures in place to set the board up for success? How so?
 - Think of three of your congregational committees and/or task forces: What is their role? Is it clearly defined? Is their size and structure properly defined by the purpose they are working to achieve?
3. Reflect about your congregation's leadership culture:
 - How do you, as a board, work in sacred partnership with other lay leaders and professionals in your congregation?
 - Ask those in attendance to each choose three words that describe your board meetings. Discuss any commonalities and trends. Is there anything you can aspire to be doing differently?
4. Reflect about your congregation's leadership development work:
 - How do you engage congregants and target them for future leadership?
 - What training and coaching do you give your leaders, both lay and professional? What additional ongoing training do you want for your leaders?

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



Ground Your Work in Your Foundational Statements

How Can Foundational Statements Make Your Congregation the Best It Can Be?

by Amy Asin

Foundational statements—mission, vision, and values statements—are critical for effective congregational governance. They define our congregation’s purpose and why it exists (mission), what the organization would look like if we were to achieve our purpose (vision), and our community’s deeply held beliefs (values).

In today’s evolving Jewish landscape, foundational statements are critical, grounding us and helping us lead adaptable organizations capable of facing increasing challenges. Here are three ways thoughtful and useful foundational statements can help your congregation be its best.

1. Foundational statements help us focus.

Without foundational statements, congregations revert to extremes. They may be pulled to do more and more by eager volunteers, congregants, and donors, putting a strain on resources and making it difficult to say “no” or to change or end existing initiatives. Conversely, congregations may limit themselves, for example, by viewing a balanced budget as the ultimate measure of success and sustainability. This perspective (and attempts to achieve it) could lead to a downward spiral, as budget-cutting saps energy, degrades quality, and decreases membership. Furthermore, without foundational statements, congregations have no basis for decision-making, which creates potential for conflict and/or endless rehashing of decisions. Foundational statements that are both realistic and aspirational can help us set goals, make choices, and allocate resources—all in an intentional way that supports excellence.

Here are two examples.

Leaders at [Temple Sholom](#) in Cincinnati, OH, reviewed the congregation’s budget to determine whether its spending was in line with its mission. When they found that too much of their financial and human resources were being used to maintain their building, they decided to sell the building and refocus those resources on activities more central to their mission.

At [Congregation Emanu-El](#) in San Francisco, CA, leaders identified six strategic priorities to help the congregation achieve its vision. Each operational area, including worship and engagement, sets annual goals based on these priorities, enabling all congregational leaders to measure and track success using a shared lens that focuses on what is important to the congregation.

2. Foundational statements distinguish us from other organizations.

Effectively written foundational statements differentiate us from other communal institutions, such as JCCs, PTAs, the gym, and the local coffee shop. At their heart, congregations are covenantal communities with a sacred purpose—a place congregants bring their deepest concerns and greatest joys, relying on our tradition to guide them.

If our foundational statements reduce congregations to places *only* for making friends or attending programs, we won't be able to make a case for membership to those who don't see why they need a sacred covenantal community or the programs we offer—especially at the prices we charge.

3. Foundational statements shape us as the congregations we want to be.

The mission statement of the hypothetical Congregation Beit Torah in Springfield (described in my article, “[Want Your Congregation to Be Relevant and Effective? Start with Why](#)”) says: “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).”

Although most Reform congregations could easily adapt these words as their mission statement, they might shape an entirely different community because of their vision and values. For example, if a congregation's vision and values focus on connections to the outside community, one could imagine robust relationships with other local faith institutions that increase the congregation's presence at food banks, homeless shelters, and reading programs. Such a congregation might organize projects to help congregants reflect on local issues, engage in *tzedakah*, or participate in social action initiatives.

Another congregation whose vision and values focus on helping members wrestle with personal challenges might offer a small-groups program in which groups of congregants regularly come together for meaningful discussions. One group might comprise religious school families grappling with the challenges of parenthood and competing life demands, while others deal with issues facing empty nesters or families with young children. Although not everyone in the congregation will participate in a group, leaders may aim for 60 percent of congregants to attend over a three-year period.

Likewise, a congregation with a deep commitment to Jewish learning might offer educational opportunities for various demographics or social action projects that include learning about the values at the root of the initiative. Sermons would include significant references to Jewish texts and might encourage *chevruta* (partner) or family learning, and congregants' learning milestones would be regularly acknowledged. In short, Jewish education would pervade many facets of congregational life.

Of course, these examples are not meant to suggest that *nothing* else happens in these congregations, but rather that their foundational statements help leaders set priorities and make decisions about resource-allocation, policies, and initiatives.

Congregations that have not reviewed their foundational statements in the last five to 10 years should revisit them, and those with updated statements they don't use should begin to take them seriously.

To be the best congregations we can be, we must use the ideas found in our foundational statements as guides to focus our resources, simplify our decision-making, and create clear messages.

Additional Resources

1. [“The Four Best Principles of Congregational Governance,”](#) by Amy Asin
2. [“Want Your Congregation to Be Relevant and Effective? Start with Why,”](#) by Amy Asin, *Jewish Philanthropy*
3. [“Mission Matters Most,”](#) by Kim Jonker and William F. Meehan III, *Stanford Social Innovation Review*
4. [“The Gold Circle by Simon Sinek,”](#) by Marijke Overdorp, ToolsHero
5. [“Guide to Creating Mission & Vision Statements,”](#) by Craig Van Korlaar, TopNonprofits

Discussion Guide

1. If your congregation has foundational statements:
 - Read your foundational statements as a leadership team.
 - Analyze your foundational statements against the three measures in this article:
 - How do they focus your decision-making process?
 - How do they communicate the unique elements of your community?
 - How do they inform and shape your congregation as the community you want to be?
2. If you don't have foundational statements:
 - Read the three standards in this article.
 - Ask someone to take notes as you discuss:
 - What are the unique elements of your community?
 - What kind of congregation do you want to be? What are your aspirations for your congregation?
 - Read Amy Asin's article, “Start with Why”:
 - Discuss: What is your why? What is the reason you exist as a congregational community?
 - Following this meeting, ask members of your community to describe a meaningful connection with the congregation or a meaningful experience they have at the congregation. Look for patterns. What do they tell you about your purpose?
 - To further explore and establish your congregation's mission, vision, and values statements, set aside separate time to review the [“Mission, Vision, and Values \(for Congregations That Do Not Have Statements\)”](#) module of the URJ Emerging Leaders Resource.

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



Establish a Flexible Governance Structure

How to Develop a 21st Century Governance Structure for Your Congregation

by Rabbi Esther Lederman

Our world is rapidly changing, throwing challenges at us that frequently have no known solutions. Congregations are on the front lines of these challenges as they strive to strike a balance between delving into ancient traditions and finding relevance for 21st-century people.

To succeed, all congregations need to focus on developing appropriate governance structures that allow them to be both mission-driven and flexible in how their leaders achieve that mission.

Here are four ways to cultivate a 21st century governance structure in your congregation:

1. Strike a balance among different modes of governance.

Too often, congregational boards get mired in managing day-to-day tasks, micro-managing staff or volunteers, or dealing with insignificant issues. As described in the *Harvard Business Review* article “[The New Work of the Nonprofit Board](#),” “Nonprofit boards are often little more than a collection of high-powered people engaged in low-level activities.” To be productive, boards should focus on governance rather than on management.

Governance as Leadership: Reframing the Work of Nonprofit Boards introduces three modes of effective governance: generative thinking, strategic action, and fiduciary oversight. Congregational boards need to be involved in some combination of all three to meet their congregation’s sacred purpose.

Leaders can engage in generative thinking by questioning the current state, considering new possibilities, and applying critical thinking skills to reflect on challenges on the horizon. This thinking allows boards to consider what is possible. A board may engage in strategic action by weighing the pros and cons of possible approaches they might take to achieve their congregation’s sacred mission. Finally, a board engages in fiduciary oversight by ensuring that revenue and expenses, as well as items such as endowments and real estate, align with the congregation’s mission.

2. Review your board size.

To function well in these three modes of governance, a congregation’s board size is important. Imagine a board of trustees of 50, or even 35, trying to engage in a high-level, generative conversation about the mission and strategy of the congregational work. A growing number of congregations are attempting to downsize their board for this reason. No one number fits all congregations, but if your board’s size is preventing real conversations about mission, vision, and values, it’s likely too big.

3. Use volunteer groups.

Boards can delegate the work of the congregational mission by using constellations of volunteer groups, including standing committees, working groups, and time-bound task forces. However, congregations make two common mistakes in this area of governance: 1) having too many committees, often enshrined in bylaws and 2) having every committee chair sit on the board.

Why is having too many committees a problem?

Committees often have this unwritten rule: they meet monthly and exist in perpetuity, even if the work is no longer necessary. Some committees—such as the executive, personnel, finance, and nominating committees—are always needed to advance the work of the board. But abiding by the principles of flexibility and nimbleness, it's better to convene groups on an ad-hoc basis for other time-bound work, which is why task forces and working groups can be useful tools.

Task forces convene key stakeholders in a congregation to review strategic and visionary issues such as reimagining congregational education or strategizing about member engagement. Once the work of the task force is complete, it can be disbanded.

Working groups gather volunteers passionate about a specific area of congregational life to complete certain activities, such as delivering meals to congregants. Changing the name from “committee” to “working group” sets a different expectation and clarifies that members don't need to meet monthly to get their work done.

Why is having all committee chairs on the board a problem?

Often, committee chairs see themselves as representatives of their area of work and not of the whole congregation. This view leads to jockeying for resources and attention, or a sense that a particular discussion isn't important to certain board members because it doesn't affect the committees they chair. Board members should serve the whole congregation, and this view can be reinforced by not having a board of committee chairs.

4. Evaluate whether your bylaws limit your ability to adapt.

One of the tools that can either help or hinder a congregation's work is its bylaws, which enable clear lines of responsibility, authority, and accountability. However, they often contain a level of detail that constricts the work of congregational boards. For example, listing every required committee and its charter may create a roadblock when certain committees become irrelevant but must be maintained because the bylaws mandate their existence. In general, bylaws should be minimalist in nature, allowing maximum flexibility in a rapidly changing environment.

Aligning with the 21st century isn't only about governance structure, but also about leveraging technology to make leaders' work more efficient. Consider using video or conference calls for meetings when feasible, and collaboration platforms such as Yammer or Google Docs for document sharing and editing.

Adapting congregational governance structures to fit the changing needs of our communities is not easy, but neither is it too complicated to achieve. As Moses proclaims to the Israelites in the Book of Deuteronomy, “*lo bashamayim hee*—[the answer] is not in the heavens.” The governance structure of a congregation can help determine the success or failure of not only the community's mission, but also Reform Judaism's sacred mission: to create a more whole, just, and compassionate world for ourselves and for each other.

Additional Resources:

1. “[The Four Best Principles of Congregational Governance](#),” by Amy Asin
2. “[The New Work of the Nonprofit Board](#),” by Barbara E. Taylor, Richard P. Chait, and Thomas P. Holland, *The Harvard Business Review*
3. The [Temple Board](#) and [Leadership & Governance](#) groups in The Tent

Discussion Guide:

1. How can you ensure that you, as a board, engage in all three modes of effective governance:
 - **Generative thinking:** Do you, as a board, critically reflect on your congregation's current state and on challenges on the horizon? If not, how can you allocate board meeting time to do so?
 - **Strategic action:** How do you, as a board, weigh pros and cons to approaches you might take?
 - **Fiduciary oversight:** How do you, as a board, ensure that your congregation's financial decisions and operations are aligned with your mission?
2. How can you find an effective balance when engaging in these three modes of governance?
3. What are some specific areas of congregational life that could currently benefit from greater generative thinking and strategic action?
4. What are some areas in which additional flexibility in your bylaws would encourage more effective governance?
5. How does your committee structure encourage or limit leadership development opportunities? What are some ways you could deploy volunteers in timebound projects and tasks?

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



Establish a Flexible Governance Structure

What Should Be the Role of the Executive Committee?

by Amy Asin

An executive committee can play a crucial role in the strategic leadership of a congregation. Regrettably, many congregational executive committees—rather than fulfilling their true purpose—serve only to preprocess board decisions, leading to a disengaged board. We have seen a trend among congregations that realize this diminished role is ineffective but lacking an understanding of the true value of the executive committee, are choosing to eliminate it.

This trend is problematic because a well-functioning executive committee provides tremendous value to a congregation. Certain functions of the executive committee can create a better running board, as well as help establish the congregation's leadership culture and ensure a strong future for the congregation. Rather than eliminating the executive committee, consider the important role it should play.

What exactly is that role?

Here is a guide to what an executive committee should do—always, sometimes, and never.

An executive committee should *always* perform these functions:

1. Act as a sounding board for the congregation's senior leadership.

In most congregations, the members of the executive committee should serve as trusted advisors for the president, the senior or solo rabbi, and other senior staff. In congregations without staff, they should serve as thought partners for the lay leaders who oversee various functions of the congregation.

Senior leaders who have an idea in the early stages of inception should be able to turn to the executive committee for initial, confidential feedback to assist in thinking through the idea before sharing it with the full board or with a specific working group. Such a conversation is not intended as a way to get the idea approved.

For example, an executive director and treasurer may want to rethink the way their congregation approaches budgeting every year. Before bringing this idea to the board, they check in with the executive committee to get a sense of whether a change in the budgeting process is a priority, understand what concerns their new plan should address, and get advice about who else they should consult in the process. Following this initial discussion, the executive director and treasurer would work on their plan and eventually present it to the full board for approval.

2. Ensure the board is equipped to work well across all three modes of governance.

To meet a congregation's sacred purpose, boards need to be involved in three modes of governance: generative thinking, strategic action, and fiduciary oversight. The executive committee should set the stage for the board to engage successfully in all three modes.

How?

The executive committee should ensure the board has annual priorities for its work and that each priority is appropriately staffed with volunteers, clergy, and/or staff. It should also ensure that board members have clear portfolios; connections to committees, task forces, or working groups; and special projects on which to work.

The executive committee should establish a thoughtful agenda for each board meeting, suggesting generative and strategic questions for the board to consider, and keeping management conversations to a minimum. It also should work in advance with individuals making presentations to the board to ensure they have done their homework, will present in an appropriate manner, and have considered answers (or a timeline to respond) to questions board members are likely to ask. These efforts are *not* to preapprove recommendations, but rather to ensure, to the extent possible, that recommendations are ready to be considered by the board, helping to make meetings effective. Finally, the executive committee should keep the board accountable when it comes to following up on major work items, such as next steps on particular items as may be determined at a board retreat.

3. Ensure confidential handling of personnel matters.

In some congregations, the executive committee acts as the personnel committee; in others it ensures there is a functioning personnel committee. One of the biggest mistakes among congregations that eliminate their executive committees is that they fail to create a personnel committee in its place. Do not put yourself in a position where all personnel decisions have to be brought to the full board.

4. Handle emergency items between board meetings.

Since the executive committee tends to meet more frequently than the board, it can address urgent issues. However, the ability to convene a board via video or phone conferencing makes this function less important than in the past.

In our smallest congregations—those with fewer than 150 households or those with little or no staff—the executive committee *sometimes* coordinates the operations of the congregation. This role is an important one in these congregations, but even then, it shouldn't be its *only* role. In small congregations with staff or clergy, operations, to the extent possible, should not be within the realm of the executive committee.

If the executive committee is performing more than the functions above, it should consider if it is overstepping its bounds. In particular, an executive committee should *never* perform these functions:

1. Take an official vote for the congregation, except under extreme circumstances.
2. Decide not to bring an issue or item to the board for a vote because the executive committee itself disagrees about whether or not to approve it.
3. Delegitimize the board by reprocessing decisions and bringing them to the board only for approval.

Additional Resources

1. “[How to Build an Effective Executive Committee](#),” by Joan Garry

Discussion Guide

1. As a board, use a 3-2-1 protocol to ask each person to share their thoughts about this article as follows:
 - Highlight and share three ideas that resonate with you
 - Highlight and share two ideas that challenge you
 - Highlight one idea you want to learn more about
2. Think about the executive committee in your congregation: How do its processes, purpose, and role align with the functions of an executive committee that are mentioned in this piece?



Establish a Flexible Governance Structure

The Three Roles Your Board Is Missing

by Amy Asin

Every winter, congregations start to form their board nominating committees, and committee members begin to think about the board vacancies they will have to fill. You may be considering which current congregational leaders might be ready for the next step of their leadership journey or, perhaps, which individuals might be best positioned to contribute to high-level conversations regarding the strategic direction of the congregation, long-term resource management, or policy decisions.

Nominating candidates who can effectively be involved in the three modes of governance is very important. At the same time, I want to propose three board roles you should have that you may not have thought about.

1. The environmental scanner

No, this is not a new electronic gadget. The environmental scanner is a person whose job it is to stay on top of the latest trends and happenings in the Jewish world, in your local community, and in other nonprofit circles. This person loves to read, listens to podcasts, and rolls around new ideas in their head. They are able to identify something that's worth sharing with everyone else to read—and that's exactly what they do. On a regular basis, they forward articles and links to your entire leadership team, and on a regular basis, you set aside time at board, staff, and other leadership meetings to review a few of the things they have sent and discuss the implications for your congregation.

It would be a good idea for your environmental scanner to regularly read resources, including but certainly not limited to:

- News outlets such as [JTA](#), [The Forward](#), [The Jewish Week](#), [Tablet Magazine](#), Israeli newspapers, your local Jewish news site and more
- Blogs and other content sites like [HUC College Commons](#), [eJewish Philanthropy](#), [Judaism Unbound](#), [Clergy Leadership Incubator Synagogue Innovation Blog](#), [Daf Yomi](#), and [Kenissa Communities of Meaning Blog](#)
- The URJ's [Inside Leadership blog](#) and conversations in [The Tent](#)
- The Reform Movement's social media channels
- [ReformJudaism.org](#) content (such as [Jewish holiday content](#), [blog posts](#), and [podcasts](#))

When your environmental scanner finds something good, they should also post it in the relevant group in [The Tent](#) and add the hashtag [#WeRead](#) so congregational leaders across North America can be in the know and join the conversation.

2. The URJ liaison

The URJ liaison's job is to make sure your congregation is getting the most out of its membership in the Union for Reform Judaism. This person keeps up with the "Dates & Deadlines" and "Resources & Opportunities" sections of the URJ's *Inside Leadership* newsletter (delivered the first and third Tuesdays of the month) and makes sure your leadership is aware of relevant offerings. They may also liaise with people participating in URJ

projects—from teens going to the *L'Taken Social Justice Seminar* to the leaders who took the [URJ Congregational Finances Courses](#), to understand the value of the connection to the URJ.

When a question or need arises in your congregation, this person is the one to say, “I wonder if the URJ can help us with that.” Then they can [contact the URJ Knowledge Network team](#), turn to The Tent, or reach out to their other URJ contacts.

3. The youth leader

The third role is for a teenager in your community. The purpose of this role is three-fold: to raise the youth agenda in the minds of board members; to give a young person in your community an incredible leadership opportunity; and, maybe most importantly, to have the youth voice represented about issues that matter to them.

This perspective will [help your congregation engage more of its teens](#), which is a critical component of maintaining strong, relevant congregations now and in future generations. It might be that this position needs to rotate among several teens; you can figure out what would work best for your congregation. But it's a vital way to ensure that the views of your young leaders and members are represented in the room.

Governing a 21st-century congregation is a multifaceted endeavor. Adding these three roles to your board can help your leadership stay on top of current trends, gain new perspectives, and access valuable resources that your congregation can benefit from. To assist you in making informed and thoughtful decisions about who to elect to these and other board roles, the URJ developed a resource, [Running a Congregational Nominating Committee](#). This resource can further help you identify and recommend a strong and diverse slate for your board, whose members will shape the future of your congregation.

Additional Resources:

1. *Governance as Leadership: Reframing the Work of Nonprofit Boards*, by Dr. Richard Chait, William Ryan, and Barbara Taylor
2. “[How and Why Teen Leaders Can Strengthen Your Congregation](#),” by Amy Asin and Miriam T. Chilton, URJ's *Inside Leadership* blog
3. URJ Resource: [Running a Congregational Nominating Committee](#)

Discussion Guide:

1. To what extent is your board already doing the following:
 - Environmental scanning?
 - Connecting you to the resources of the URJ?
 - Elevating the voice of youth?
2. Are there board members or emerging leaders who can fill either the environmental scanning or URJ liaison role?
3. Experience shows that having one youth present is not effective but having them serve in pairs can be very effective.
 - Is this an option for you?
 - In addition to inviting your youth group president (if you have one) to serve on your board, what other creative ways can elevate the voice of youth in congregational leadership?
4. If you were able to assign these roles, what would be the benefit to your board and your discussions?

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



Create a Healthy Leadership Culture

How to Establish a Healthy Leadership Culture in Your Congregation

by Rabbi Janet Offel

Whenever someone utters the words “synagogue governance,” our minds usually go to issues of bylaws, the structure and content of board meetings, and the assemblage of committees. When discussing this topic, we often overlook the importance of a healthy leadership culture.

Congregations thrive when leaders embrace sacred partnership, represent the diverse spectrum of the community, nurture new ideas and experimentation, and promote an inquisitive, positive organizational mindset.

The URJ has identified four cultural habits that inspire healthy leadership and promote good governance.

1. Cultivate sacred partnership.

Healthy leadership culture begins with an awareness and acknowledgment that we are all created *b'tzelem Elohim*, in God's image, and that everyone in congregational leadership—lay leaders, clergy, and professional staff—values and trusts each other. The relationships among congregational leaders are unique. They are [sacred partnerships](#), built and nurtured through mutual respect, trust, honesty, listening and communication, transparency, confidentiality, flexibility, and reflection. [Cultivating sacred partnerships](#) takes time and care, but it is a cornerstone for building a healthy, vibrant congregational culture. The [URJ Sacred Partnership Resource and Discussion Guide](#) offers a guided exploration of this concept to congregational leaders.

2. Acknowledge diverse opinions within a culture of constructive and respectful disagreement.

As [April Baskin and Amy Asin note](#), “Creating inclusive spaces and respecting your members on the margin isn't a nicety, like installing a coffee machine in the foyer. It's a necessity.” Encouraging diversity means embracing a multiplicity of people (and their opinions) while maintaining a culture of constructive and respectful disagreement. Soliciting diverse opinions isn't something that “stands in the way of getting things done,” but rather is imperative to nurturing your congregation's creativity and growth.

Yes, diverse opinions can and often do lead to disagreements. If your congregation needs assistance to learn how to argue appropriately and usefully, consider exploring [The 9Adar Project](#), an initiative of the Pardes Center for Judaism and Conflict Resolution, intended to increase our communal ability to cultivate constructive conflicts and manage disagreements in a healthy manner.

3. Encourage new ideas and experimentation.

New ideas that lead to change must be nurtured and encouraged. Often, though, new ideas can create a fear of failure. As [Rabbi Esther Lederman notes](#), “Labeling a new initiative an ‘experiment’ or ‘pilot’ can lessen resistance to trying something new.” Congregations that are willing to embrace the possibility of failure in their experiments are more apt to encourage new ideas. An [openness to embracing change](#) is vital for congregations to remain relevant and thrive into the future. Encouraging new ideas and experimentation opens the door to such transformational change.

4. Promote a “growth mindset” and culture of abundance.

Stanford University psychology professor and researcher [Dr. Carole Dweck contrasts a “growth mindset” with](#)

a “[fixed mindset](#).” A growth mindset assumes that intelligence and abilities are not predetermined, but can be developed based upon a person’s efforts, attitude, and environment. The work of Dweck and others has shown that it is possible for the mindsets of individuals of any age to change from fixed to growth, leading to increased motivation and achievement.

In congregations, a [growth mindset](#) promotes moving forward with vibrancy and confidence, particularly in today’s world in which change occurs both rapidly and constantly. Leaders who exhibit a growth mindset refrain from finding fault with a particular person or with each other when challenges arise. Rather, they positively and collaboratively work toward shared goals for the community.

Promoting a growth mindset is related to embracing a culture of abundance and to the importance of focusing on the richness of resources within the congregation, instead of concentrating only on what is lacking. Every congregation faces challenges. Encouraging a culture of abundance will help your leaders find the pools of plenty in your congregation and build upon strengths rather focus only on deficits and deficiencies. For example, in a culture of abundance, leaders might look at selling an aging, too-large building in favor of creating a smaller, nimbler footprint in the community. Freeing up resources in this way can provide opportunities for greater flexibility, ingenuity, and financial capacity to meet changing needs, while sustaining a congregational community into the future.

A healthy synagogue governance culture embraces and nourishes leaders who are self-reflective, transparent, and open to feedback; it encourages a diversity of opinions and new ideas, providing key components for moving forward together in sacred community. *L’dor v’dor*, from generation to generation, as our ancestors bequeathed Torah to us in times of great change, so, too, in this time of great change may we continue to pass it forward to generations yet to come.

Additional Resources:

1. “[The 4 Best Principles of Congregational Governance](#),” Amy Asin
2. [The URJ’s Sacred Partnership Resource and Discussion Guide](#)
3. “[How to Find the Joy in Board Service](#),” by Joan Garry, URJ’s *Inside Leadership* blog
4. [The 9 Adar Project](#) of the Pardes Center for Judaism and Conflict Resolution
5. “[Creating a Culture of Experimentation in Your Congregation](#),” Rabbi Esther Lederman, URJ’s *Inside Leadership* blog
6. “[What Does a Congregation with a Growth Mindset Look Like?](#)” Rabbi Janet Offel and Julie Lambert, RJE

Discussion Guide:

1. Considering the four ways outlined to establish a healthy leadership culture in your congregation, in what areas is your congregation strongest and in what areas is there room for the most improvement?
2. How has your congregation used the principles noted in this article when faced with difficult situations? Are there other principles that have been helpful? If so, what are they?
3. Pick one of the four ways outlined to establish a healthy leadership culture and develop a plan of action for bringing this principle more to the forefront in the coming year.

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



Create a Healthy Leadership Culture

What Does a Congregation with a Growth Mindset Look Like?

by Rabbi Janet Offel and Julie Lambert, RJE

In a well-known and often cited exchange, the modern Jewish philosopher Franz Rosenzweig (1886-1929) was once asked whether he put on *tefillin* (phylacteries). Rosenzweig famously responded, “Not yet.” His spiritual life at the time did not encompass this mitzvah of traditional Judaism, but his answer signaled an openness to something that, for him, represented an unexplored avenue for possible spiritual growth.

In the words of [Dr. Carol Dweck](#), a Stanford University psychology professor and researcher, “‘Not yet’ [signals] that you’re on a learning curve. It gives you a path into the future.” Rosenzweig’s response, therefore, represents the willingness to embrace growth, or what Dweck defines as a growth mindset.

Dweck popularized the concepts of growth and fixed mindsets in her 2006 book *Mindset: The New Psychology of Success*. While a fixed mindset assumes a person’s intelligence and abilities are pre-determined, a growth mindset assumes that they can be developed based on the person’s efforts, attitude, and environment.

Dweck’s groundbreaking work revealed that when students have a growth mindset and *believe* they can get smarter, they put in the extra time and effort needed for higher achievement. On the other hand, students with a fixed mindset—who feel that they are either good at something or not—give up in frustration when something becomes too difficult. They also require constant praise and feel threatened when others succeed.

Dweck discovered that it is possible for individuals’ mindsets to change from fixed to growth, leading to increased motivation and achievement.

In more recent years, organizations have applied the concepts of growth and fixed mindsets to their work. Dweck and others have found that organizations exhibiting a fixed mindset approach to governance and leadership attract less motivated people—and individuals who bring fresh ideas and creative suggestions aren’t inspired to remain involved or active in the organization, so they leave or lose interest after a few years. Like children, adults in organizations that exhibit a fixed mindset have a desire to “look smart” and therefore avoid challenges.

Conversely, employees in organizations that embrace a growth mindset are not afraid to take risks and innovate. They understand the importance of experimentation, aren’t afraid to fail, and are able to grow from both their successes and failures. Since their organizations provide opportunities for growth and promote the belief that everyone can develop their abilities, these employees feel more empowered and committed to their organizations.

Congregations, too, can exhibit fixed or growth mindsets. A congregation’s leadership can either avoid challenges and be fearful of failure, or embrace experimentation and develop abilities and commitment. What, then, does a congregation exhibiting a growth mindset look like?

1. It doesn’t default to doing things “the way we’ve always done them.”

Leaders in a congregation that embraces a growth mindset realize it is impossible to stand still and continue to thrive as an organization. They are honest about the changing world and reflective of the big picture, instead of striving to maintain the status quo at all costs.

Unlike leaders in a congregation exhibiting a fixed mindset, they aren't afraid to revisit outdated governance models or touch "sacred cows," such as organizational or staffing structures that were once successful, but are no longer reflective of the congregation's size or needs.

2. Its leaders take risks and view challenges as opportunities.

Congregations that nurture a growth mindset and the leaders they cultivate look at a problem and see it as an opportunity for growth and change. If something isn't working, they face the challenge head-on and aren't afraid to take risks in figuring out how to grow from this place.

3. It welcomes experimentation and isn't afraid of failure.

Congregations with a growth mindset are open to experimentation—as well as failure!—and recognize that not all adaptations will be successful. They realize that our biggest mistakes and failures offer tremendous opportunities for learning and growth. These congregations develop a [culture of experimentation](#) in order to constantly evolve and be responsive to demographic changes.

4. Its leadership is open, collaborative, positive, and diverse.

Instead of trying to fix a problem by hiring a different person or putting the "right person" in the position, leaders in congregations with a growth mindset focus on collaboration, discourse, and shared accountability. They don't look to find fault with a particular person when challenges arise, but rather positively and collaboratively work towards growth. These congregations value the unique talents each leader brings to the table, and ensure that their board members and senior leadership—both lay and professional—represent a wide range of competencies and skills.

Although most of us as Reform Jews would not consider wearing *tefillin* as an experience of spiritual growth, we can all embrace the power of "not yet." We all have the opportunity to grow spiritually and emotionally as individuals—and collectively as congregations—by nurturing a growth mindset for ourselves and our communities.

Additional Resources:

1. ["Growth Mindset vs. Fixed Mindset"](#)—video by John Spencer
2. ["Carol Dweck: A Summary of The Two Mindsets and The Power of Believing That You Can Improve,"](#) Farnam Street blog
3. ["Carol Dweck on "Developing a Growth Mindset Culture in Organizations"](#)—Talks at Google
4. ["Creating a Culture of Experimentation in Your Congregation,"](#) Rabbi Esther Lederman, URJ's *Inside Leadership* blog

Discussion Guide:

1. How does the lens of fixed mindset versus growth mindset help you understand your congregation's leaders and leadership culture?
2. What challenges does your congregation currently face, which could be addressed by adopting a growth mindset?
3. What initiatives has your congregation undertaken this past year in which you exhibited a growth mindset?
4. Consider an issue in the congregation that feels unresolved. How could exhibiting a growth mindset alleviate this problem?

Rabbi Janet Offel is the URJ's director of Consulting and Transition Management. **Julie Lambert, RJE**, is an associate director of Congregational Innovation at the Union for Reform Judaism.



Create a Healthy Leadership Culture

Key Areas to Make Your Congregation

Audaciously Hospitable

by April Baskin and Amy Asin

If you want your congregation to be strong and to thrive, [audacious hospitality](#) is not optional. Creating inclusive spaces and taking proactive measures to respect your members on the margins isn't a nicety, like installing a coffee machine in the foyer. It's a necessity.

Think of it this way: Audacious hospitality is as necessary to your congregation as your Torah scroll.

Consider these statistics: [A fifth of the Jewish population is racially and ethnically diverse](#) and [more than 70% of non-Orthodox Jews who married after 2000 were in interfaith marriages](#).

We live in times of change and increased social awareness. Additionally, people are seeking experiences that relate to *all* aspects of their identities. If your institution is not doing everything possible to foster a safe, welcoming, and equitable space for *all* members and visitors, they'll find another community that will.

It can be difficult—but, ultimately, healing—to implement genuine acts of audacious hospitality. If, however, you're willing to invest in that effort, your congregation will become a place of true wholeness, compassion, and justice, and your actions will help transform today's Jewish landscape.

If you're not sure where to start to take audacious hospitality to the next level, consider these four high-impact areas of focus for your congregation:

1. Your Congregation's Governance

Twentieth-century models of congregational governance no longer work. To meet the needs of our changing Jewish landscape, diversity and inclusion must be prioritized within the governance of the congregation.

Make sure you have clear foundational statements that establish inclusivity, likely in a values statement. It's important to ask: Do your existing statements include language that is outdated or unintentionally exclusionary? If not, do they truly and properly articulate the inclusive community you envision?

Look, too, at *who* leads your congregation. New leaders with different talents and backgrounds will bring new ideas to your congregation. Empower a diverse group of people—with regard to race, sexual orientation, gender, age, socio-economical background, and people with disabilities, as well as other factors—to assume leadership roles.

2. The Design of Your Programming

To maintain an interesting and active congregation, your programming should reflect the diversity and interests of *all* your members. Your programs and the interactions you have with congregants will be more robust and enriching if they address the evolving 21st-century Jewish demographics and the diverse experiences of your members.

The principle “Nothing about us without us,” or [bringing congregants into the design process](#), is critical to creating programming for diverse groups. Co-construct your offerings with a broad range of members, and if you need additional resources, invite outside speakers to address your congregation.

For example, ask a Jew-of-Color to speak about the effects of systemic racism within the Jewish community, or invite an LGBTQIA+ Jewish leader to guide your leaders regarding use of pronouns and all-gender washrooms. If you’re holding [Introduction to Judaism](#) courses, encourage Jews-by-choice to speak and potentially lead classes, especially if they identify as Jews on the margins. Provide a platform for interfaith families to speak about differences and similarities among their extended families’ belief systems.

3. Your Online Presence

Assume that prospective members will research you online. [You have approximately 10 seconds](#) to communicate your value proposition to online users through your website or social media sites. Take a look at your congregation’s website, paying special attention to your home page and your “About Us,” “Mission,” and “Values” sections. Are they authentic, compelling, and specific? Or do they include vague proclamations that your synagogue is “warm and welcoming,” without any evidence to back up the claims?

When designing and editing your site, list ways your congregation works to be a warm, vibrant community. Post photos reflecting the diversity of your congregation; discuss what you’re doing for your congregants and within the community at large; communicate your congregational values clearly and effectively so that visitors and prospective members know they will be walking into a space that welcomes them for who they—and their families—are.

Need some guidance? [Use our “Welcoming Website Checklist” in the URJ’s Audacious Hospitality Toolkit to get started.](#)

4. Your Partnerships

A strong congregation cannot thrive without rooting itself firmly within the community it serves. You can do this by reaching beyond your existing membership and establishing connections with other local synagogues, organizations, and houses of worship.

By being in relationship with other Jewish allies, you allow your members to foster meaningful connections and make an impact on the larger Jewish community. Partnering with both local interfaith and secular organizations is important, too, because it showcases an authentic desire for allyship that crosses lines of creed and culture, and it reinforces our tradition’s teaching of *b’tzelem Elohim*, that we are all created in the image of the Divine regardless of our beliefs.

Making transformative change to the inclusive practices in our Jewish community starts at home. This work isn’t always easy and mistakes will inevitably happen in the pursuit of a better future. Recognizing areas for improvement in your community—particularly through actively listening, apologizing, and adapting a willingness to change—will foster deep trust among you, your congregants, and your [sacred partners](#).

Although this work can be challenging, and [you must be willing to change](#) and be open to making mistakes along the way, it’s all worth the effort—because every one of your members is worth it. If you’re serious about creating a community that is relevant in the 21st century, making your congregation audaciously hospitable in both small- and large-scale ways is essential.

The time to act is now.

Additional Resources:

1. The URJ's [Audacious Hospitality Toolkit and Educational Resource Modules](#)
2. Tent Groups: [Audacious Hospitality Outreach & LGBTQIA+](#)
3. "4 Ways We Can Resolve to Be More Hospitable in 2019," by April Baskin, URJ's *Inside Leadership* blog
4. "Practical Diversity: Taking Inclusion from Theory to Practice," by Dr. Dawn Bennett-Alexander, TED Talk
5. "Who Counts? Race and the Jewish Future," by Ilana Kaufman, ELI Talk
6. "How to Overcome our Biases: Walk Boldly Towards Them," by Vernā Myers, TED Talk
7. "Why 'I'm not racist' is only half the story," by Dr. Robin DiAngelo, Big Think

Discussion Guide:

1. Reflect on the makeup of your congregational board members and lay leaders:
 - Are your leaders representative of the diversity of your congregation/community?
 - Is there diversity in your leadership with regards to race, sexual orientation, gender, age, socio-economic background, and/or people living with disabilities? If not, what can you do to change this?
 - How is your congregation nurturing the next generation of leadership to ensure continued diversity of leadership?
2. Communication and governance are key in all aspects of congregational life. Take a moment to consider both your online presence and the general message you are evoking through your foundational statements and who is in leadership positions:
 - Who is prominent in your congregation's marketing materials, website, and social media? Who is missing?
 - What message is being sent through who is being seen, namely in leadership positions? Will marginalized groups in your space believe their needs are being met based on this?
 - Do your foundational statements and by-laws reflect the Audaciously Hospitable culture that you're seeking to cultivate?
3. Consider the phrase, "Nothing about us without us" in regard to your congregation, specifically your programming:
 - Who are your programs aiming to serve? Is that group included in the planning and implementation of your goals? If not, how can you change that?
 - What opportunities exist to serve those whose needs are not currently being met through your programs? How do those congregants wish to be involved in the planning process?
4. Think about who your external partners are—both current and potential—in making your community more Audaciously Hospitable:
 - Who have you reached out to? What was your decision-making process in connecting with them?
 - Who have you considered reaching out to but have yet to? What questions do you have for or about them?
 - Which demographics do your partners represent? Who in your congregation might feel more "seen" as a result of this partnership?

April Baskin was the URJ's vice president for Audacious Hospitality. **Amy Asin** is the URJ's vice president for Strengthening Congregations.



Create a Healthy Leadership Culture

Ways to Work More Transparently—and How It Can Help Your Congregation

by Larry Glickman, FTA

“Sharing work as it develops enables you to reflect on your work. It brings stakeholders into work early to provide feedback and assistance. It encourages you to be purposeful and effective in your work. Importantly it also enables others to develop a passive awareness of your work progress and to learn from how you do your work.” (Simon Terry, organizational consultant and writer).

There are so many benefits to be found for congregations if we can learn to work toward better transparency and collaboration between our lay and professional leadership teams. When we are more transparent, we [collaborate more effectively](#). If we purposefully share our work in progress and invite more people into our work processes, we can get more work done in a shorter period of time. Our work can have greater impact, and we can save both time and money.

When we know that other leaders have access to our work, our work will most likely reflect their interests and concerns. If, for example, we know the rabbi has access to our plans for a New Member Shabbat, then we will make sure our ideas reflect what we think the rabbi is going to want to see in that program.

Additionally, when others can access our work, they become aware of projects we are working on and how those projects might connect to their work. They may not become deeply engaged with our work and may not provide feedback, but they are aware, and that awareness will be reflected in their work.

Think of a congregational committee or task force meeting. What usually happens? Typically, an agenda is written and shared with everyone at the meeting. Attendees participate in discussions, set goals, receive assignments, and take notes. After the meeting, attendees and committee members receive meeting minutes, and someone presents a report at the next board meeting, which may be anywhere from two to six weeks away.

This is all well and good, and certainly, our congregations have been effectively serving the Reform Jewish world for generations using this approach. But how can we work with more transparency and be more collaborative in our work?

1. Identify opportunities for collaboration through your agenda.

Before the meeting, review your agenda. How might the work and conversations of your committee or task force impact other committees or task forces at your congregation? Recognizing those connections, use your agenda review as an opportunity to make sure other teams are aware of what you're working on and invite their input and collaboration.

2. Share meeting minutes immediately.

There's no need to wait until the next board meeting to report about your task force's work. Get in the habit of sharing information with other leaders immediately, on an ongoing basis, instead of waiting to make a carefully

prepared presentation at the board meeting. Right away, send the minutes to the entire board and other leaders—and be purposeful about making sure leaders of other teams are aware of how your projects may connect to their work. By waiting until the next board meeting, the work of your team may be done, so instead, encourage other leaders to get back to you immediately, in real time, so your work reflects their interests and concerns.

3. Work out loud.

Don't keep your work to yourself or wait until you're presenting to the board to hear the dreaded words, "We tried that before, and it didn't work then. Why would it work now?" Let the board know what you're working on and give them access to the work itself. Invite their participation, encourage their feedback, incorporate their suggestions, and welcome their challenges—and make sure your work addresses possible concerns before it even gets to the board.

Collaborating in a visible, transparent way will help make your congregation work smoother and smarter when the time comes to plan broader initiatives—including your annual meeting. Information will be easier to collect, varying opinions will be easier to represent, and unwelcome surprises will be easier to avoid.

Engaging in open, honest discussions with a diverse, connected network of people will make for an improved, more positive work process. Conversations can stay focused on key visionary, strategic initiatives rather than dealing with projects some people were unaware of, and updates some people did not receive.

Make no mistake, being more transparent and collaborative can be difficult. We surrender a little bit of our ego and leverage when we open ourselves up to correction and criticism. We want our work to be done before it is seen by others; we want our work to reflect the very best of who we are and what we know. This sense of self-preservation and protection may serve our selves and souls well, but it gets in the way of us working more effectively on behalf of the congregation.

So share what you know and what you're working on. Encourage feedback. Connect to work being done by others. Let their work inform your work, and save time while being more effective. Share more. Collaborate more. Be more transparent.

Additional Resources:

1. "[6 Principles of Effective Collaboration](#)," by Larry Glickman, FTA, URJ's *Inside Leadership* blog
2. "[The Right Way to Run Meetings](#)," by Joan Garry

Discussion Guide:

1. What are some small changes your board can make as you work towards more transparency and collaboration?
 - How can information be shared before and between board meetings?
 - Instead of scheduling committee updates at your next board meeting, how can these reports be shared in advance and in a transparent way?
 - How can you utilize collaboration platforms, like Slack or [Yammer](#), to foster communication and sharing amongst members of your board and broader leadership team?
2. What are some risks of working with more transparency?
3. What are some benefits of working with more transparency?

Larry Glickman, FTA, is the director of the Reform Movement Marketplace at the Union for Reform Judaism.



Engage in Ongoing Leadership Development

How to Invest in Forward-Thinking Leadership Development

by Amy Asin and Lisa Lieberman Barzilai, RJE

“Exercising leadership has nothing to do with your role, your job... To me, leadership is a behavior.” (Marty Linsky, adaptive leadership expert).

There is far more to leadership than a title. As Harvard Kennedy School professor Marty Linsky shares, leadership is defined by what you *do*, not by what you are. It is a verb rather than a noun. As such, congregations

should view leadership as an enriching Jewish experience—one that has multiple entry points, paths, and potential for impact.

Based on Linsky’s view, the task, then, of leadership development is not finding people to train for roles, but rather *engaging* a broad set of congregants to see themselves as leaders. Once this mindset shift happens, the task of finding new leaders also is modified.

All congregants have leadership potential, whether or not they hold an official leadership position. For example, an involved parent talking passionately in the parking lot about the congregation is demonstrating leadership. They may be interested in sitting on the education committee, but the true bar for leadership is an individual’s commitment and enthusiasm.

Moreover, even seasoned leaders are not finished refining their skills. Leadership is a journey of constant learning, not a destination. Especially in our ever-evolving, 21st-century world, any leader—new or veteran—needs to engage in growth opportunities through both learning and practice.

As our secular and religious communities become more diverse and complex, leadership development requires increasingly intentional and well thought out programs. It is imperative that we teach skills, behaviors, and mindsets and provide leaders with opportunities to use them.

These five principles can help you invest in constant, deliberate, and forward-thinking leadership development to support new and long-term leaders.

1. Balance classroom learning with practical experience.

Often leaders spend time in classroom learning without enough time devoted to application of the work. The longtime, successful [70-20-10 leadership development model](#) allocates 10 percent of time to training and coursework; 20 percent to coaching or mentoring; and 70 percent to challenging assignments. People learn a lot about themselves and about their leadership skills and styles by taking on tasks, and reflecting upon their successes and challenges, especially with a coach or mentor.

2. Assign mentors.

Mentorship is critical to maintaining a growth trajectory and a pipeline of leaders. A mentorship model provides a way for leaders with specific roles to share knowledge and wisdom. Moreover, training veteran leaders to serve

as mentors to new or potential leaders offers learning opportunities to all. Through reflection and conversation, leaders at all levels are able to think critically about the work they do on behalf of the congregation.

3. Build on strengths.

No single individual can excel in all areas. Using the notion of appreciative inquiry—examining strengths and successes and building upon these strengths—creates a positive dynamic. As management consultant Peter Drucker details in [Diana Whitney and Amanda Trosten-Bloom’s book on this topic](#), “The ageless essence of leadership is to create an alignment of strengths in ways that make a system’s weaknesses irrelevant.”

This idea applies not only to systems, but also to ways to develop leaders as individuals. Although we advocate choosing an area of growth in which to build capacity, don’t lose sight of existing strengths. Individuals should build on their strengths and bring them to bear at all leadership levels. By focusing on and developing leaders’ strengths, your congregation will become a resilient, sacred community.

4. Intentionally plan your succession.

Too often congregations’ pipeline to leadership is merely scaffolding or a framework. Although board or executive committee experience is important, alone it does not prepare leaders sufficiently to move to higher positions. Creating a pipeline requires specific training in both the culture of the congregation and the leadership skills necessary for success—not only for the congregation’s next president, but for every other aspiring leader, including the next task force leader, committee chair, vice president, and, yes, the person who speaks positively at a congregational meeting. Provide opportunities for these and other individuals to move into new volunteer positions by having term limits, which allow leaders to rotate regularly. Don’t forget people whom you train but for whom no immediate position is available. One of them may be best for the next opening. You must actively plan and create opportunities for growth toward new responsibilities and positions.

5. Leverage existing leadership development resources.

Urge all leaders—volunteers, clergy, and professionals—to continually immerse themselves in learning opportunities, including those available from the URJ and many local communities. Encourage clergy and professional staff to join their [Reform Movement professional organizations](#) and to participate in ongoing leadership programming. In the digital world, more and more is open to all, you just need to look.

Congregational leadership is unique. Our work is a holy task built on sacred partnerships and Jewish values. Our communities can and should be the calm in the storm of people’s lives. Leading in these sacred communities provides opportunities to help create that holy community for oneself and others. Let’s be sure to provide leadership development that assists our leaders in being the best they can be.

Additional Resources:

1. “The Four Best Principles of Congregational Governance,” by Amy Asin
2. [URJ Emerging Leaders Resource](#)
3. [URJ Leadership Skills and Styles Inventory](#)
4. “The 70-20-10 Leadership Development Model,” the Bridgespan Group
5. *The Power of Appreciative Inquiry: A Practical Guide to Positive Change* by Diana Whitney and Amanda Trosten-Bloom

Discussion Guide:

1. Do you have a broad definition of leadership in your congregation? If so, in what ways? If not, how can you change this?
2. Reflect on your current leadership skills and strengths:
 - Ask each board member to complete the rubrics in pages 6-13 of the [URJ Leadership Skills and Styles Inventory](#) in advance of the meeting and bring their inventory with them.
 - Break into small groups and ask each person to share three leadership strengths from their rubric.
 - Ask the groups to discuss: Based on the strengths shared, how can you complement each other in your work on behalf of the congregation?
 - Ask everyone to turn in their inventory. Following the session, connect with the rest of your senior leadership to assess the responses. Note where you have depth and what skills and styles you might want to add during the next nominating committee cycle.
3. Reflect on ways in which you invest in future leaders:
 - What type of leadership development do you offer in your congregation? If you don’t offer any, what steps do you need to take to create a program? If you do, what can you do to improve your program?
 - What is your succession plan for all levels of leadership?

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Engage in Ongoing Leadership Development

How to Get New Leaders into the Pipeline

by Lisa Lieberman Barzilai, RJE

Cultivating a pipeline of knowledgeable, engaged leaders and creating a succession plan are critical for the vitality of any congregation. Yet, one of the most frequent questions congregational leaders across North America ask is this: “How can we find new leaders?”

Although the process may seem mysterious, it’s actually not complex. Creating and filling a leadership pipeline includes three steps: identifying, recruiting, and supporting new volunteer leaders.

1. Identify Possible Leaders

Although it would be wonderful if it happened, most people don’t walk up to the president, rabbi, or other congregational leader to announce they want to volunteer as a leader. Yes, some do, but most leaders will tell you they were tapped on the shoulder by someone who saw their potential on various fronts.

Here are several things to consider as you seek to identify people suitable for a tap on the shoulder.

- **Leadership Potential:** Some prospective leaders will stand out naturally. Perhaps they participate actively in your community, connect to the mission of the congregation, share ideas and opinions about congregational and communal work, or show a natural propensity to lead others.
- **Diversity:** Beyond leadership potential, it’s important to ask: “Is our leadership diverse?” Diversity should be as expansive as possible and consider Jews of color; LGBTQIA+ individuals; and people from different generations and life stages, including 20s and 30s, singles, and parents with young children. A new URJ resource, [Running a Congregational Nominating Committee](#), contains a list of demographics that may prove helpful.

Ensuring that diverse viewpoints within the congregation are shared and heard leads to better decisions for the whole community. As Dr. Brene Brown says in *Dare to Lead*: “Daring leaders fight for the inclusion of all people, opinions, and perspectives because that makes us all better and stronger.”

- **Leadership Skills and Styles:** Each of us is unique not only based upon the communities we represent, but also because of our life experiences and our innate abilities. When looking to recruit new leaders, consider the depth and strength of professional and general leadership skills that already exist among your leaders and actively seek people who have skills and talents that are missing from your team. Don’t discount a variety of leadership styles, either. A mix of visionary, action-oriented, analytical, and diplomatic leaders among the group, for example, may prompt different ideas about problems and solutions. The URJ’s [Leadership Skills and Styles Inventory](#) can help you gather data about current and potential leaders.

2. Recruit Prospective Leaders

Once you’ve identified prospective leaders, you need to recruit them. The first step is to identify the right recruiters from among your current or past leaders.

Although someone may seem to be the perfect recruiter for a potential leader, that person might not be comfortable making the ask. For each ask, it's important to consider whether the right recruiter is a professional or lay leader and whether or not the person has a positive, personal leadership story within the congregation.

It's also important to think about the ask itself. If you're aware of individuals' passions, your recruiter can appropriately appeal to them. To help you learn about potential volunteers, it may be worthwhile to have an initial conversation before extending a leadership invitation.

Although you always want volunteers to agree to serve with a resounding "yes," coercing people into leadership roles often can backfire. As [Dr. Erica Brown shares](#): "The pressure to conform, comply, or contribute often steers well-meaning but overcommitted individuals to say what they don't really mean... What help[s] get people to 'yes' [is] the possibility of and personal freedom to say 'no.'"

How is getting people to "yes" best accomplished?

Be sure to know what you're asking of the person. Do you want them to join the board, chair a task force, or participate in your leadership development program? If you have a specific role or task in mind, have on hand a [volunteer role description](#) and/or a list of goals to be achieved. Be honest and clear about what you're asking, the true time commitment involved, and what both the congregation and the individual will gain by serving as a leader.

3. Support Your Volunteers

Once you get to "yes," it's critical to support your new leader. Intentionally plan leadership development training and have new leaders work on a project to help them better understand their roles. Be sure, too, to provide ongoing training and mentorship for all leaders—veteran and new. Mostly, ensure that your volunteers grow from the experience and feel more deeply connected to your congregational community.

Additional Resources:

1. [URJ Emerging Leaders Resource](#)
2. [URJ Leadership Skills and Styles Inventory](#)
3. URJ Resource: [Choosing the Right Roles for New Leaders](#)
4. URJ Resource: [Running a Congregational Nominating Committee](#)
5. "Three Reflective Questions for Emerging Leaders to Explore," by Lisa Lieberman Barzilai, RJE, URJ's *Inside Leadership* blog

Discussion Guide:

1. In what ways can you identify new leaders for your congregation?
2. What are you doing to ensure that there is diversity within your leadership?
3. Who might be your best recruiters for prospective leaders?
4. What type of ongoing training should you have for yourselves and other leaders in your congregation?

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