Sulam for Strategic Planners

Planning to Plan

Robert Leventhal – USCJ Transformation Specialist Team Leader
Moderator – Aimee Close, Transformation Specialist
Overview

• Overview of Sulam Leadership
• Sulam for Strategic Planners (SSP): What, Why, When?
• SSP Planning Strategies
• Why do you want to engage in planning? Questions?
• Overview of Key Planning Sessions
  • Forming a Strategic Planning Committee - Scope of Planning
  • Situation and SWOT Analysis
  • Congregational Surveys- Debrief Surveys
  • Mission and Vision Statements
  • Strategic Direction for Task Forces
  • Priority Setting – Recommendations
  • Report Adoption and Implementation

• Next Steps
What?

• Sulam for Strategic Planners (SSP) is a program of USCJ to strengthen *kehilot* (Jewish congregations inside and outside the walls of the synagogue)

• SSP guides *kehilla* leaders through the process of creating a mission and vision for the future, assessing the wants and needs of their community, and developing strategies that best utilize their capacities.

Get “out of the box” of looking at the next 35 days and design outcomes for the next 3-5 years.
Who?

• Planning Steering Committee (SC)
• Planning Chairs
• Board, Staff
• Participants
• Congregation
• USCJ Transformation Specialists
Helps planners make connections—gives them a nudge

“As a relatively new rabbi at my congregation, this process is helpful because it allows me to connect my synagogue with outside resources and a broader network, so that the volunteers can feel that they don’t need to re-invent the wheel, rather can pull from other literature and experiences, as we set out on this sacred task of strategic planning.”

Rabbi Rachel Ain, Sutton Place Synagogue
Increases participation and engagement – all task force meeting

“It was an inspiring moment for me as a leader to see new people emerge to take on important leadership roles.”

-Helena Ross, SSP Planning Chair, Town and Village Synagogue
Supports the skilled volunteer facilitator

“When I was approached in the past to lead a strategic planning process for our synagogue, I always said “no”. Even though I do this for a living as a consultant for non-profits, the thought of doing it as a volunteer among my dear friends and fellow congregants felt overwhelming. I knew it would be a very emotional process requiring leadership that could be objective and bring credibility to the process and I just wasn’t sure I was the right person. However, when the opportunity arose to lead the process as part of the USCJ Sulam for Strategic Planners Cohort, I said “yes”. Why, what changed? After learning of the structure, resources, expertise, mentoring and peer learning provided as part of the program, I felt I would have the support I needed. I was right.”

Marla Cooper, Beth Shalom, Wilmington, Delaware
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You Will Not Be Alone
The role of Transformation Specialists
Transformation Specialists Will...

Be Present! – Facilitate and/or assist in the facilitation of the SC start-up session, the Vision Builder, All Task Force Meeting and Priority Setting Workshop.

Check-in and Debrief – Work with the SC in-between sessions.

Coach – Support you through successes and challenges. Help highlight short term wins!


Feel Confident and Happy!
Transformation Specialists Will Not...

• Recruit your leaders
• Do your assignments
• Apologize for checking up and tracking your progress
• Stop requesting copies of your deliverables
• Own your decisions
• Write your report
• Ensure your success

“Don’t own client issues”
- Peter Block-
What is Strategic Planning?

SSP STRATEGIES
A systematic, formally documented process for deciding the handful of key decisions that an organization must get right in order to thrive over the next few years. http://www.simply-strategic-planning.com/definition-of-strategic-planning.html

- Who are we?
- Where are we at?
- What is next?
- Adapt
- Reposition
- Add staff or scale back?
- Secure financial sustainability
- Move
- Merge
Strategic Planning
“Stirs the pot”

• Looks to future (3–5 years) beyond day to day problem solving (35 days)
• Stirs the pot. Planning leaders can make synagogue managers uncomfortable
• Seeds ideas that are often only realized years later
Congregational Strategic Conversations
SSP Planning Assumptions

• Change happens through conversation
• The SSP planning process provides structure for conversation
• Planning is about making critical decisions
• Congregations have limited attention and capacity
• Need to find an appropriate fit for your congregation

Holy Conversations
Alban wisdom on the planning process in congregations
(Gil Rendle, Alice Mann-Alban, Herndon, VA. 2003)
Synagogue’s Mission/Vision
Who are we? What do we want to become?

Members’ Wants and Needs
What will they attend? What will they pay for? What will engage them?

Capacities
What are we known for? What are YOU good at? Talents and strengths

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SSP Strategies

• Builds a Sacred and Strategic Core Leadership Team**
• Uses Time Efficiently - Maintains Momentum
• Encourages reflection - Ongoing review and commentary of planning texts
• Fosters a forward looking vision of the Future
• Encourages creativity and innovation - greenhouses ideas
• Increases participation and engagement - SC- All Task Force Meeting and Community Town Meetings
• Supports the skilled volunteer facilitator
• Creates a shared vocabulary

**See my blog on "Getting Down to the Business of Teambuilding" @ ByachadLeadership @blogspot
SSP Campaign of Change

*Our Iceberg is Melting*- John Kotter NY: ST Martins Press-2005 (P 130-131)
From Sulam for Current Leaders - The Change Management Plan

**Getting Started**

- Create A Sense of **Urgency**- assess challenges of your environment and your capacity for leadership
- Build a Guiding **Coalition** - SC, president, executive director, Transformation Specialists

**Decide What to Do**

- Develop **Vision** of Change - SCL helps you build a road map
SSP Campaign of Change
Make it Happen

• Communicate - Get buy in from the group – read materials, attend workshops, webinars

• Empower Others to Act - remove barriers – provide resources, support – authority and responsibility. Get board members to participate in training

• Produce Short Term Wins - ensure some early successes, meet them where they are, try out some easy ideas

• Don’t Let Up - Raise expectations for change as you go. Work with KRM to access whole range of SULAM programs

• Create a New Culture – Anchor the change – SEL – SCL - Kehilla Strengthening
Strategic Planning Challenges

- No sense of urgency
- No guiding coalition
- Resistance to change
- “A new pharaoh arises” - new leaders with other ideas
- Goals set are beyond their capacity
- Task forces not properly led, frustrates participants
- No implementation committee or process to track goals
- Unintended consequences

Help ensure your plans don’t sit on the shelf.
Are you ready to start?

- There is urgency for change
- **Clergy are supportive**
- Key leaders are committed to planning
- Some **financial support** for planning (flights, hotels for two training sessions)
- No major initiative competing – e.g. rabbinical search or capital campaign
- Capacity for creativity - willing to recruit for it
- Tolerance of feedback
- Capacity to manage conflict

Your KRM and Transformation Specialist will help you determine if you are ready.
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Why are you interested in strategic planning?

Enter questions in the chat box

USCJ
Program Pillars

How this program will support You
Program Pillars
SSP Supports Your Team

• **Webinars** - Eight Webinars from May 2015 to April 2016
• **Readings** - Articles, Web Links, Bibliography
• **Annotated Planning Exercises and Worksheets**
• **SSP Resource Bank** – success stories, related USCJ resources
• **Transformation Specialists** - Your guides from A-Z
• **Cohort Peer Learning**
• **Coaching Calls** – *Kehilla* check ins, Cohort wide calls
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Defining Scope of Planning
Shared Commitment to Planning
Key SSP Sessions

- **Joint**
  - Form Committee
  - May 2015

- **Self**
  - SWOT
  - June-July 2015

- **Self**
  - Survey and Committee Interviews
  - June-July 2015

- **Self**
  - Debrief Survey
  - August-September 2015

- **Joint**
  - Vision and Mission
  - October-November 2015

- **Joint**
  - All Task Force Meeting
  - January 2016

- **Joint**
  - Task Force Meetings
  - February-May 2016

- **Joint**
  - Priority Setting Workshop
  - May-June 2016
Steering Committee (SC)
Size and Composition (10-14)

• Core (4-6)
  • President and incoming President
  • Senior Rabbi or Other Clergy
  • Two Co-chairs
  • Executive Director (when available)

• Others (6-8)
  • Seek mix of different skills
  • Ensure members share core competencies
  • Key influencers- past leaders

Please review our Tips for Successful Steering Committees.

“It was exciting to see our SC come together as a team during the SWOT analysis”– Ron Meir, Congregation Beth El Orange, NJ
What is their **time** commitment?

**Steering Committee**

- **Leadership Team**
  - (10–14 people) meets monthly for about a year.
  - Most serve on task forces for 3–4 months and meet to review the work of others.
  - Assume **12 meetings**

**Task Force Members**

- Go to All Task Force Meeting and then have **3–4 meetings**. This will require efforts of **20–50 people**.
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Situation and SWOT Analysis
Congregational Surveys and Committee Interviews
Shared Assumptions
## Situation and SWOT Analysis

### Capacity to Possibilities

<table>
<thead>
<tr>
<th>Internal forces, trends and factors inside the synagogue that impact our future</th>
<th>Strengths</th>
<th>Opportunities (partners)</th>
</tr>
</thead>
<tbody>
<tr>
<td>External forces, trends and factors outside of the synagogue that impact our future</td>
<td>Weaknesses</td>
<td>Threats (competitors)</td>
</tr>
</tbody>
</table>
## Congregational Surveys and Debriefs

SSP Congregational Survey, 1900 responses, October 2013

<table>
<thead>
<tr>
<th>Membership Elements</th>
<th>Percentage Who Rated Very Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sense of Community</td>
<td>59.8 %</td>
</tr>
<tr>
<td>Warm and Welcoming</td>
<td>59.1 %</td>
</tr>
<tr>
<td>Branch of Judaism</td>
<td>57.1 %</td>
</tr>
<tr>
<td>Rabbi</td>
<td>56.4 %</td>
</tr>
<tr>
<td>Content of Services</td>
<td>43.7 %</td>
</tr>
<tr>
<td>Location</td>
<td>44.0 %</td>
</tr>
<tr>
<td>Vision of Clergy</td>
<td>38.2 %</td>
</tr>
<tr>
<td>Cantor</td>
<td>30.7 %</td>
</tr>
<tr>
<td>Friends of neighbors belong</td>
<td>28.5 %</td>
</tr>
<tr>
<td>Social Aspects</td>
<td>28.5 %</td>
</tr>
</tbody>
</table>
SSP Congregational Survey Debrief

• After reviewing the data, what are the three (3) biggest themes that emerge for you as a planning leader?
  1
  2
  3

• After reviewing the survey findings, what gives you the most hope?

• After reviewing the survey findings, what creates the most concern?

• Take one of your themes and describe what a new direction would be like
  We would shift from x to y.

• Review the list of suggestions. Please pick one that excites you
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Mission/Vision Statements
Shared Vision
Mission Statements

Key Questions

• What is our mission - our desired outcome?
• Who are the stakeholders?
• Who are our customers?
• What do our members value?
• What is our “point of difference?”
• What would we like to be known for (our niche, position, passion)?
Our Vision

Adas Israel aspires to perpetuate Judaism, to enrich the lives of our members, and to celebrate Conservative Judaism at its creative best.

Kehillah Kadoshah (A Sacred Community)
We are one community with many faces. Our Conservative congregation is marked by a joyful spirit of warmth, participation, and religious aspiration. Among our many programs, study groups, and social opportunities, there is one that can make each of us feel at home in our congregation.

L’Dor Va’Dor (From Generation to Generation)
We honor our past and celebrate our living Jewish future. Through a powerful chain of tradition and meaning, our members of all ages take pride in supporting our children, youth and young adults in discovering their Jewish futures.

Elitz Hayim Hi (It Is a Tree of Life)
We hold firm to Torah from one another. With opportunities for growth and life-long learning, we enable each in this diverse community, regardless of age or background, to find a path into Torah, personal meaning, and Jewish life.

Ahavat Yisrael (Love of Israel)
We recognize and support Israel as the heart of the Jewish world. As such we find ways to celebrate and uphold the Jewish state through here to Israel, as well as through educational and outreach programs.

Ohr Olam (A Light to the World)
We are a longstanding pillar of Jewish Washington, and continue to lead through innovation, and in advocating justice and performing charity. Our leadership inspires us to uphold justice through Tzedek Olam (Purifying the World), as well as through Gemilarot Hasidim (Acts of Lovingkindness) to those in need. Our arms are open in kindness and righteousness to the wider Jewish community, to the greater Washington community, and beyond.

Movakhesi Derchah (Seeking the Path)
We are a congregation devoted to seeking an ever-evolving path for Jews of all backgrounds to discover personal meaning, inspiration, and insight. Through innovative programs, outreach, and openness to cutting-edge ideas, we are a spiritual center for a new century, where all people are always welcome to come and find personal significance and new ways into Judaism.
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Strategic Direction of Task Forces
Shared Direction
Strategy

• A method or plan to bring about a desired future...

• ...Marshalling resources for their most efficient and effective use.

• http://www.businessdictionary.com/definition/strategy.html#ixzz297RFwegx

From the Greek word (“Strategos”) for generalship.

Your Next Move?
What do you want to do differently or better than others to increase your value proposition?
Strategic Direction for Task Forces

Report Template

- Members
- Situation – Background - Fact Book, Interviews, Survey, SWOT - Data Gathering Team
- Vision - From Vision Builder Exercise - Vision Team
- Strategies - From Co-Chairs, SC and Staff
- Recommendations - Task Force, then approved by SC
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Priority Setting of Recommendations & Report
Final Report & Implementation
Decision Criteria

What factors should we consider in evaluating our recommendations?

Factors
• Increase revenue
• Reduce cost
• Reduce a risk
• Develop a donor
• Promote a principle
• Enhance perceived value
• Build our brand-reputation
Welcome
• Letter from Rabbi, President and Chairs
• We are proud to report... Want to thank all... Names
• SC
• Task Forces

Overview of SSP Process
• Key Steps in Process

Background to Plan
• Current Situation- SWOT Summary

Emerging Themes and Strategies
• Congregational Survey- Executive Summary of Findings
• Themes and Shifts

Looking Forward
• Mission and Vision

Task Force Reports
• Members
• Background- Situation and SWOT
• Vision
• Strategies
• Priority Recommendations for Action
• Responsible Party
• Time (On-going, short term, medium term, long term)
• Assumptions for Finance

Three Year Budget Forecast
Implementations Plan
• Overview of Implementation Approach
• Board Role
## Implementation Plan

<table>
<thead>
<tr>
<th>Recommendation for Action</th>
<th>IMPLEMENTING AGENT (P/V)*</th>
<th>TIMING</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Apply for Sulam for Emerging Leaders program to target 35-45 year old segment</td>
<td>P: Rabbi V: Trainer</td>
<td>ST</td>
</tr>
<tr>
<td>2. Make special effort to reach empty nesters. Reinvigorate Hazak Committee.</td>
<td>P: Program Director V: Hazak Committee</td>
<td>ST</td>
</tr>
<tr>
<td>3. Improve the internal data base to identify congregants who may be interested in specialized programming.</td>
<td>P: Program Director V: Technology Committee</td>
<td>LT</td>
</tr>
</tbody>
</table>

ST = Short Term- 0-6 months, MT = Medium Term- 6-18 months, LT = Long Term- 18+ months
P= Professional  V= Volunteer*
Thank you
Sulam for Strategic Planners