

If one does not plow in the summer, what will one eat in the winter?

Midrash Mishlei

Synagogue leaders often feel they do not have time to plan. There is so much to do.

Scenes from synagogue life:

- The Welcoming Committee is busy trying to go the extra step to make new members feel at ease. They are developing programs to reduce the costs to new members.
- The financial secretary is trying to be a good fiduciary. He is aggressively pursuing people with dues in arrears. Some on his list have been members for less than three years. Some of the conversations and emails are very tense. He is not a particularly patient person.
- The board president has led a text study on the importance of board members being more involved in the life of the community. Board members loyally attend meetings but few even consider having a new member to their homes for Shabbat.
- The preschool director is working hard to differentiate the school from competition. She is frustrated that none of the clergy or lay leaders made it to the Open House program.

What is wrong with this picture? In this portrait people are working hard to do things right, but they are often working at cross-purposes. Something seems to be missing in the big picture.

“Management” refers to how things are to be done (efficiently, on time, within budget). It means doing things right: preparing the ground properly and tending the field. “Leadership” focuses on what is to be done: the direction and mission. Leadership decides what should be planted. Leadership makes it possible for people to share a vision that plants the seeds of collaboration and coordination.

**Mission: The Promise
to Abraham**

According to Peter Drucker, the mission of an organization is, “why you do what you do, the organization’s reason for being, its purpose. It says what, in the end, you want to be remembered for.”¹ The word “mission” comes from the Latin *mittere*, which means, “to send out.” Missions communicate a message that mobilizes people to pursue their work together.

Our foundational text about mission is *Lech Lecha*, (Genesis 12:1-4):

The Lord said to Abram, “Go forth from your native land and from your father’s house to the land that I will show you.
I will make of you a great nation,
And I will bless you.
I will make your name great,
And you shall be a blessing.
I will bless those who bless you;
And curse him that curses you;
And all the families of the earth shall bless you
Shall bless themselves by you.”

God plants the seed of a covenantal relationship with Abraham, and sends him out with the promise that he will have a blessed future and many descendants, as numerous as the stars. God plants the seeds of the people God hopes the Jews will become. As Abraham steps forward on his journey, he will need to communicate this mission to others. Abraham’s gift is that he sees the potential of what is promised. It is not a burden; rather it is an opportunity for a new vision.

Defining a mission takes deep reflection. When leaders are asked, “Who owns the synagogue?” most answer, “The members.” Dan Hotchkiss counters this by proposing that the owner of the synagogue is its mission.² If the mission is to build a *kehilla kedosha* (sacred community) dedicated to engaging families in study, prayer and social justice, then the owners might be current members, future members and others in the local community. Decisions about the sustainability of the congregation might be different if all these current and future stakeholders were able to vote.

¹ Drucker, Peter, *Managing the Non-Profit Organization*, 1990.

² Hotchkiss, Dan, *Governance and Ministry: Rethinking Board Leadership*, Alban Institute, 2009.

As your board and committee leaders plan for the year, they need to understand why they are all around the table. Attending meetings is not enough. Leaders need to enrich the life of the congregation and be enriched by it. They need to joyously model Jewish life and invite others to share it. Their presence needs to be felt in a variety of public settings, not just the boardroom. They need to ensure some of them make it to the preschool open house. *A mission is a promise to do something.* Each year the board and every committee should review its mission to make sure that it answers key questions about what the kehilla has promised to do. According to Drucker, a mission statement should answer the following questions:

Mission Questions

Possible Answers

1. What is our mission –our desired outcome? What do we do?

We seek to create a kehilla (Jewish community inside and outside the walls of the synagogue) that helps its members build meaningful Jewish lives through worship, study, caring community and social justice

2. Who is our customer?

- A diverse community of all ages
- People dedicated to social justice and action
- Seekers and learners of all ages

3. What are we known for? What is our “point of difference?” What would we like to be known for (our niche, position, passion)?

- We are committed to inclusion and full participation
- A community that has a covenantal commitment to caring and connection
- No one will be turned away for financial concerns.

Balcony Space

Ronald Heifetz describes the requirement for leaders to occupy the “balcony space” and thus to gain perspective by viewing events from a more removed vantage point. High above the organizational stage, a group of people can get out of “reactive space,” (the constraining mindset of responding to immediate issues), and move onto the balcony to see the much larger pattern. They can look at the evolving scene of congregational life and see ways to help people work together. Visionary leaders routinely ask others to join them on the balcony to take a fresh look. On the balcony they become empowered to see things in new ways. If we continue to react and do things in the same way we are likely to get the same results.

What does your leadership need to look at in a new way? While leaders need to be realistic, they must also overcome the negativity, anxiety and fear that haunts so many communities by developing the ability to create a positive and forward looking vision. A vision statement helps people describe what the future might look like if the mission was fulfilled. A mission statement is of little value unless it inspires a change of behavior.

The organization operates in accordance with its shared values. For example, Nordstrom empowers its staff to take risks in offering extraordinary customer service. Home Depot asks its purchasing staff to put on an orange apron when they enter a store to remind themselves that they are there to serve the customer.

How have you prepared your board and committees? What do they put on when they enter a meeting? What values do they carry with them through their year?

Abraham could have remained in what the *midrash* says was the family business of idol fabrication. He could have been a good manager. He might have created a better idol storage facility, negotiated better prices from suppliers, or introduced variable pricing for larger sales. In his community most young men focused on just doing things right rather than dreaming about what it would mean to do the right thing. Abraham listened to God’s vision and set his course.

Leaders of sacred communities need to manage and lead. They need to ensure that operational things happen or the light bill won’t be paid. Without vision, however, the spiritual lights can go out. Leaders need Jewish values that keep them looking for greater meaning and finding ways to help their communities build sacred and just practices to sustain them on the way.

The Lay of the Land: An Honest Assessment of the Current Situation

The most admired leadership quality, according to management scholars Kouzes and Posner⁴, is the ability to provide an honest assessment of the environment.

From a business perspective, most synagogues are small businesses, but they can be complex to manage. Business leaders look at the forces that pose opportunities or threats for their organization. Leaders take responsibility for assessing their situation. They pose important questions to their teams. They develop hypotheses. They gather data about their current situation.

How do you look at the lay of the land? Questions to consider include:

- What are our demographics? (Age of members, percent of families with school age children, numbers in each primary dues category, worship attendance figures).
- What do our members need? What do they aspire to do in their Jewish lives?
- What do our members want? What will they pay for? What will they be motivated to attend?
- What do our members most value about their membership?
- How satisfied are they with our programs?
- What programs do our staff want to prune? What do they think we should grow?
- What would our members tell their friends about the congregation?

When asked to look at their synagogue communities objectively, leaders often feel uneasy. An important strategic task is conducting a *competitive situation analysis*, which involves looking at the strengths and weaknesses of their congregation, and compare these to those of others with whom they compete. It is not uncommon to see planning groups fail to complete this task. They may be uncomfortable making an “honest” assessment of themselves or of another congregation. Leaders need to take in the lay of the land and not just the sections immediately under their plows.

⁴ *The Leadership Challenge*, <http://www.leadershipchallenge.com/WileyCDA/>

Internal Organization Factors

One way leaders manage their anxiety is by having a clear understanding of the synagogue culture, context and capacity. Leadership does not occur in a vacuum. According to Dr. Susan Shevitz⁵, as leaders try to create cohesive sacred communities, they must manage congregations that are voluntary, pluralistic and non-rational. In a voluntary system we must inspire and motivate people to step up. We can't compel them. Synagogues tend to have a small core of leaders who do most of the work. In order to grow they need written plans to expand their leadership community. Most synagogues have what Shevitz calls "weak information." They have few written plans to help move people together.

A sacred community needs the capacity to manage a diverse range of volunteer talents and interests. Congregants may connect to some individuals but not all. They may identify with some elements of the kehilla's mission and not with others. Members may be very rational in their workplaces, but they often decide congregational issues based on feelings. Leaders need to develop the emotional intelligence to help their teams manage the campaign for change. Sacred communities need the capacity to manage conflict. Leaders need to learn from their mistakes and experiences, and document their leadership lessons. They need to create shared written visions, strategies, job descriptions and goals.

What kinds of plans are guiding your work today?

External Trends, Factors and Forces

Leaders need to adjust to a changing environment. Synagogues are no longer the ethnic enclaves they were for first and second generation American Jews. Mobility has changed many communities. There has been a migration from the Northeast to the Sunbelt. Young Jews have clustered in major cities. There are also generational challenges to consider. Many of those under 35 are less oriented to membership and affiliation, and, instead, search for meaning. The Internet provides unprecedented tools for communication, social networks and learning. Whether a particular trend is a help or a hindrance, changing trends require visionary leadership. Leaders need to understand their internal organization and their external environment and step forward to address these challenges.

Leaders need to honestly assess their synagogue environment and organization without becoming reactive, or, worse, nostalgic for the past. In these challenging times synagogues and their national organizations often depend on people who feel called to go the distance.

5 "An Organizational Perspective on Changing Congregational Education," (in) Aron, Isa, *A Congregation of Learners*, 1995.

**Strategic Direction:
Addressing the Gaps
Between Vision and Reality**

The word “strategy” comes from *strategos*, the art of the general. Strategy deals with the allocation of resources. Where should the leaders allocate their troops? Where should they allocate their attention? The word “goal” comes from the Old English *golen*, which means to limit or focus. Synagogues have limited amounts of time and resources. Where should they focus their attention?

If we have a vision of creating a community of learners then we will not be satisfied when we learn that there is only a small group of regulars who attend classes. We need a strategy to move us from a “ few learners “ to a community of learners. If our vision calls for us to create a culture of giving, we will not be complacent with only 50% of our board giving to the campaign or with only a handful of leaders making solicitation calls. If our vision calls for us to create a leadership environment that welcomes a new generation of board leaders we need to ensure that our board experience is compelling.

Kehilla leaders need to develop overarching strategies and goals for the board and the congregation. The Leadership Plan identifies the critical issues for the board to address and provides a charge to work groups.

The Leadership Plan

Here is an example of how to start a Leadership Plan in the area of board effectiveness:

"It is critical to create a more strategic and accountable board. We need a vision of our leadership community. What do we expect from each other? How will be accountable to each other? We need to clarify the roles of volunteer leaders and staff and show how they will work to put this leadership vision into action"

P.A.C.T. Goals:
Board Expectations

P.A.C.T. Principles

P.A.C.T. is an acronym for 4 parts of our goal setting process. (P- Purposes, A-Action, C-Capacity and T-Time).

P.A.C.T. Goals provide a platform for leaders to talk about their priorities.

The P.A.C.T. Goals process also helps to focus leaders on key Sulam leadership change management principles.

Purpose- We believe that congregations need to have a compelling sense of purpose. Key goals should be challenged to address how they will advance this mission. Why are we doing this?

Action- We believe that vision cannot be up in the clouds. It needs to be grounded in reality. We only really understand our vision as we try to move vision into action.

Capacity- Most business have limited capacity. They have to be strategic in how they allocate their resources. Most synagogues are understaffed. They depend on volunteers to drive many projects. Synagogues are traditional organizations. Change is disruptive and creates conflict and synagogue leaders only have so much capacity to deal with it.

In such an environment change leaders have to choose wisely where to direct their staff, their money and their leadership focus.

Time- We can't do everything at once. The strategic leader considers their mission and vision in relationship with the members wants and needs vs. capacity and decides what things can be done in the short term, intermediate term and long term time frames.

EXAMPLE:

P- Purpose Why do it?	A- Action What to do?	C- Capacity Who can do it?	C- Capacity How much cost/ effort	Time- When
Create clear expectations to help the board be a leadership community and a team	Create a short board expectations document that lists critical expectations	President and leadership chair will take	We have tried to do this for years. We are optimistic that it can be addressed now	Short Term- Next 6 months

Conclusion

Where should strategic direction come from? Strategic direction begins at the top. It comes from staff, the officers and from strategic planning committees. They frame an issue and then invite a committee or work team to create specific goals to address it. With a shared vision leaders can help coordinate and align the efforts of a diverse group of leaders and various committees and teams. When a car's tires are not aligned, the ride is bumpy and the tires wear out. With all the internal and external challenges synagogues face, it is difficult to create a sacred community if we all pull in different directions. When leaders are not aligned, as in our opening scene, they make mistakes and get burnt out. Leadership work helps create shared vision, collaboration and commitment. It plants the seeds for blessed communities as numerous as the stars.

THE LEADERSHIP PLAN CHECKLIST

- Review your mission. Does it need to be changed?**
- Develop a vision that describes your aspirations and motivates leadership.**
- Examine your current situation. What is the gap between your vision and your current reality?**
- List some of the strategic initiatives that will address the gaps.**
- Create P.A.C.T. goals for your strategic initiatives.**