

**STAR SYNAGOGUE STUDIES #2**

**STAR**



**STRATEGIC  
PLANNING IN  
CONGREGATIONS:**

**CAPITALIZING ON  
OPPORTUNITIES FOR  
ORGANIZATIONAL  
CHANGE**

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**SPRING 2008**

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## **ACKNOWLEDGMENTS**

The LRP (Long-Range Planning) project of STAR (Synagogues: Transformation and Renewal), of which this document is a part, germinated during intriguing conversations among Sanford Cardin, president of the Charles and Lynn Schusterman Family Foundation, Lynn and Stacy Schusterman and David Teutsch at the Conversation in Aspen, CO in 2005. We are grateful for the funding of this project by the Charles and Lynn Schusterman Family Foundation. The authors wish to express our gratitude and appreciation to Rabbi Hayim Herring, executive director of STAR, who has been a supportive and knowledgeable guide throughout this project, and to Wendy Clyman, STAR's executive assistant, and Shelli Hesselroth, STAR's controller, for their able efforts on its behalf. The authors wish to thank Isabel DeKoninck and Sandy Rubenstein, who assisted in the consulting and seminar projects, for their insights throughout the process. The Reconstructionist Rabbinical College hosted the LRP project, and we particularly thank its president, Rabbi Dan Ehrenkrantz, and vice president Jennifer Abraham, as well as Cheryl Plumly and Chris Marsh for their gracious help. Additionally, we wish to thank all of the participants across the nine congregations involved in this study. While we cannot name you, your time and insights have been invaluable to our learning and discovery in this process.

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Spring 2008



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## EXECUTIVE SUMMARY

This study of long-range and strategic planning in Jewish congregations constitutes an important contribution to the emerging field of synagogue studies both in method and substance. Methodologically it models the application of control-group studies to congregational research. As an exploration of long-range planning, synagogue change, and the role of consulting, it breaks fresh ground that has significant implications for the revitalization of the synagogue in America. Since the synagogue is the primary locus of Jewish community and acculturation, this study should be of interest to anyone concerned with the future of North American Jewry.

This study focused on nine congregations consisting of three groups of three spanning the religious movements. One group consisted of Synaplex congregations doing planning with a consultant, Rabbi David Teutsch, and attending relevant seminars. A second group consisted of Synaplex congregations not working with that consultant or attending those seminars. The third group was non-Synaplex congregations doing planning without that consultant or the seminars. In order to ensure the validity of the research, the evaluation process was designed and carried out entirely by Sharon Ravitch, an expert in evaluation. David Teutsch had no contact with the congregations for which he was not a consultant. Ravitch independently performed the data analysis and reached the conclusions published in this study.

The three congregations in the first group completed highly developed plans within the eighteen-month timeframe of the study. Of the remaining five, three did not complete plans. The last two had consulting help, in one case pro bono, and completed plans that were not as complex or impactful. Two other congregations were not considered part of the nine-congregation core because they gave up hope of finishing a plan and dropped out so early. The study generated nine major findings:

1. Consultants make a pivotal difference in whether plans are completed, and the choice of consultant has a significant impact on the quality of the plan and depth of synagogue transformation.
2. For planning to be effective, the congregation must be ready. It needs stable professional leadership, volunteers committed to planning, and sufficient congregational focus and staffing.
3. The varied roles of rabbis—from CEO to spiritual leader, from professional with a very strong sense of job description to absolutely dedicated vocation—all can be accommodated effectively, but the nature of the rabbinic role in a particular congregation needs attention for planning to work.
4. The consultant's training is critical to effectiveness. Relevant training involves six areas: Jewish texts, traditions, history and values; contemporary Jewish demographics, ideologies and communal structure; best practices of synagogues, churches and not-for-profit organizations; sophisticated interpersonal skills and substantial experience; knowledge of relevant theory in areas such as leadership, organizational culture, change and conflict resolution; and specialized expertise, such as fund development, marketing and organizational design.

5. Excellent planning results in significant organizational change not only through implementation of the plan itself but through the fresh thinking, insights and concepts it introduces, through the change that occurs during the planning process, and through the research and engagement methods it introduces that help the congregation to become a learning organization.
6. At its best, planning provides an opportunity for leadership development that strengthens the commitments of leaders to the congregation and to further leadership development.
7. The addition of seminars and networking to planning processes substantially increases the impact of fresh ideas, the development of skills, and the consideration of alternative models.
8. Synaplex, a program of STAR, helps with readiness for planning by introducing team decision making and objectives-driven planning. Nevertheless, involvement with Synaplex alone does not appear to be a strong determinant of long-term planning success.
9. The three congregations working with a consultant were required to make a deposit refundable upon completion of their plans. This had an impact on their commitment to finishing on time. Consultants might accomplish the same thing by structuring in a fee rebate if the plan is completed on schedule.

Some key advice to congregations emerges from this study. They should take care to hire a consultant who can provide the extra skills needed by the congregation. Planning is a time-consuming venture, so congregations should be careful to allot sufficient resources to it. The scope of the plan should be determined at the outset, and then a design for the process appropriate to that scope should be developed. The design of the process has a significant impact on planning success. Planning should be understood in part as a change process that requires fresh thinking, data, and analysis. Communication at all stages of planning is critical to its effectiveness. Plans must be specific to the congregation's situation. Leadership development is a significant factor in all impactful congregational planning. Consultants for planning and training are not inexpensive; a budget for them should be an ongoing part of annual expenditures.

Major steps are needed to improve the field of synagogue consulting, and considerable more research is needed to expand upon the issues raised by this study.

## Introduction

For the past two millennia the synagogue has been the central point of engagement for Jews and continues to be the locus of religious, cultural, and educational expression that is a focal point for Jewish identity, education, cohesion and community. The synagogue is the core institution within the community that is uniquely positioned to provide content to Jewish life and helps us navigate the issues of faith and fate, personal experience and communal continuity. (Heller, 2005, p. vii)

Given the central role of the synagogue in American Jewish life, there is much written on American synagogues in general, and on the synagogue as a foundation of Jewish life in the United States in specific (e.g., Heller, 2005; Kaufman, 2005; Starr, 2005). Literature in this realm includes explorations of the role of demographics and socio-historical influences on synagogues and Jewish life more broadly (e.g., Cohen, 2006; Gordis, et al., 2005; Herring, 2005), as well as examinations of the roles and experiences of clergy within synagogue life (e.g., Allen, 2005; Bookman, 2004; Bookman & Kahn, 2007; Weiss, 2005). There is also an emerging literature that explores historical and current changes in synagogues and how the Jewish community is addressing the evolving needs of congregations and the Jewish community more generally (e.g., Bookman & Kahn, 2007; Hoffman, 2006). A limited number of studies evaluate particular models of planning and synagogue change (e.g., Aron & Wolfson, 2002; Cohen, 2006; Hoffman, 2004). However, these studies are largely program evaluations that focus on one specific program or initiative. Despite the growing body of scholarship in these areas, there is a dearth of research-based literature that examines broad issues of synagogue consulting, planning and change initiatives using an evidence-based approach (Newberg, Ravitch, & Teutsch, 2007). The dearth of such literature, combined with the growing need for it, prompted STAR (Synagogues: Transformation and Renewal) to initiate research that creates and evaluates data on synagogue planning and change initiatives. The goal of this research is to advance efforts that assist synagogues to become more skilled at fulfilling their missions, which include Jewish acculturation and community building, as well as to examine, in a data-based manner, the role in congregational change of a variety of forms of synagogue consulting and of Synaplex<sup>1</sup> specifically.

A growing number of professionals and organizations provide consulting to congregations (see Newberg, Ravitch, & Teutsch, 2007 for an annotated list). This trend reflects that the American Jewish community, and the synagogues that serve it, are now at a time of great need. Synagogues must work harder than ever before to attract participants, as joining a synagogue is no longer automatic for American Jews. (National Jewish Population Survey, United Jewish Communities, 2000-1). And the expectation of quality in programming has gone steadily higher. This is a direct outgrowth of congregation members who are now accustomed to highly effective, self-examining organizations from their ever-growing professional and communal lives outside of the synagogue context (Bookman & Kahn, 2007). Related to this is that the synagogue has increasingly become viewed as an option or a hobby rather than as a centerpiece of religious and community life. As Heller (2005) states, “We live in an era of autonomy where personal identity and Jewish commitments are not necessarily based upon communal norms but often are choices made by individuals” (p. vii).

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<sup>1</sup> For a definition and discussion of Synaplex, see Finding Eight below.

These factors, combined with the turbulent environment that affects all organizations, have created conditions requiring rapid adaptation by Jewish congregations. The American Jewish community is in need of a better understanding of the roles, functions and effectiveness of synagogue change efforts because the improvement that these services and experiences provide offers hope for renewal and transformation in the Jewish community.

The current study, because it examines this domain of synagogue work, provides a venue for asking critical questions about the impact of synagogue change efforts, the effectiveness of congregational consulting for long-range planning, the nature of effective consulting, the range and scope of the changes that it creates, and the criteria that ought to be developed to ascertain its effectiveness. As a recent report written by Newberg, Ravitch and Teutsch (2007) states, "Synagogues use consultants as one of the major resources for problem solving and adapting to the growing trends and changes....Understanding the world of consultants should be important to anyone interested in Jewish institutions, yet little is known about synagogue consultants. There is little centralized information that identifies them, locates them, or categorizes how they do what they do. The level of their impact is not widely known" (p. 3). Given the need for access to consulting services for congregations, and for the development of criteria for choosing among those services, this is a critical time for examining the state of affairs in synagogue planning and consulting in a way that will enable more effective change efforts and allow the synagogue-consulting field to grow and, as a result, to strengthen synagogues and therefore the Jewish community more broadly. As Heller (2005) states,

The future shape of the synagogue will be defined not by its physical architecture but by its inner dynamics. Form will have to follow content, and structure will be determined by new programmatic realities. Synagogue buildings will always reflect external societal influences and the aesthetic sense of unfolding eras, but the inner content must express that inner continuum of Jewish experience, faith and community as it encounters new challenges that are simultaneously new opportunities. (p. ix)

In this context the current study seeks to explore synagogue consulting that focuses on strategic or long-range planning through the study of nine congregations that engaged in long-range planning initiatives.

Historically, North American synagogues were primarily developed and organized for service delivery with a focus on worship, education, life-cycle celebrations, social functions, and cultural events. This reflected Jewish concerns during an earlier period of Jewish life in the United States (Kaufman, 2005; Starr 2005). The shift is now to recognizing that synagogues have to be primary builders of community in order to be effective (Hoffman, 2006; Teutsch, 2005; Wolfson, 2006; Bookman and Kahn, 2007). The realization that synagogues must now engage in community building in order to be vibrant and effective is guided by the emerging wisdom in the literature. The reality of former generations was that Jews engaged mostly with other Jews (Sklare, 1971). That is not the case any more, and many Jews no longer live in primarily Jewish neighborhoods. In light of these realities, the synagogue has become an essential community builder (Cohen, 2006). That undertaking cannot be accomplished by a simple programmatic shift. It will require deep cultural change that has a significant and direct impact on the roles that synagogues play in ensuring Jewish communal engagement and affiliation (National Jewish Population Survey, United Jewish Communities, 2000-1).

This latter trend indicates that people are choosing to be involved in their synagogues in a different way than before and that they have new and more challenging expectations of synagogue functioning and service delivery. Furthermore, synagogues are not for the most part institutions that rest on existing Jewish community but are creators of community (Teutsch, 2005). To be successful in that emerging role, they must be self-examining learning organizations capable of growing in ways that support their increasingly important mission and scope. In order to understand the current situation of synagogues and their functioning, we need to recognize that the quality of their programming and their capacity to build community are not only critical for fulfilling their missions, but indeed for their very survival. Because of increasingly rapid socio-cultural change, congregations that for years continued with “business as usual” are now facing rapidly rising pressures to change without any automatic concomitant increases in quality of leadership or capacity to evolve (Bookman & Kahn, 2007). As Gordis, et al. (2005) state,

At present, many of our synagogues exhibit difficulties of poor administration, strained professional-lay relations, congregational apathy and uncertain relations between the synagogue as an institution and other communal institutions....Contemporary efforts to re-envision the synagogue must focus upon transforming the synagogue into the effective epicenter of Jewish life (pp. xvii-xviii).

Since it is broadly recognized that the synagogue is the primary source of acculturation of Jews to Judaism and Jewish life in America, this can be understood as an enormous challenge not only for synagogues but also for the Jewish community as a whole.<sup>2</sup>

## **Rationale and Significance**

Given the current state of affairs in Jewish congregational life, it is clear that synagogues can greatly benefit from outside assistance in the form of a mix of training (continuing education training for their staff, clergy and lay leaders), materials and resources, and consulting (Herring, 2005). Improving the current state of synagogue functioning and congregational offerings partly depends upon recognizing that this necessary growth and development is not simply a matter of importing better program designs. It requires dealing with deeply held attitudes and beliefs and other aspects of the organizational culture and structure that can retard or prevent congregations’ evolution in ways that make them better able to reach out to and serve their existing and potential constituencies in meaningful and effective ways. Particularly when such changes need to occur within organizations that do not have trained change agents on their staffs or that do not have the capacity to independently generate a fresh vision and plans for bringing it to fruition, outside consulting becomes important and even necessary to institutions, including synagogues.

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<sup>2</sup> One exception to the dependency on synagogues as acculturating institutions is the part of the Orthodox Jewish community involved with *yeshivot* and *kolels*, which are powerful acculturating agents. While the non-Orthodox Jewish community does have camps and day schools that have significant impact, they are not nearly as central in these communities as *yeshivot* and *kolels* in the Orthodox community. Furthermore, it is likely that many of the day schools and camps could not flourish without synagogues as feeder institutions. See, for example, Sam Heilman, *Sliding to the Right: The Contest for the Future of American Jewish Orthodoxy* (Taper Foundation, 2006) as well as Samuel Heilman and Steven Cohen, *Cosmopolitans and Parochials: Modern Orthodox Jews in America* (University of Chicago Press, 1989)

Outside consultants at their best bring with them substantial perspectives on what congregations need to consider and how they can best function. Consultants also bring with them practical tools and theoretical frameworks important to understanding organizational dynamics and assessing needs and objectives. (Argyris, 1985; Block, 1981; Schein, 1992; Senge, 1990)

This study is a response to the need to examine current synagogue leaders' attempts to understand their organizations better and to contribute to their synagogues' change efforts and development as vital centers of community engagement. In contrast to the existing literature on synagogue change, which consists largely of effectiveness or impact studies that are focused on programming and program implementation for reasons of replication, this study is grounded in data that uses external benchmarks that are necessary for understanding organizational change undertakings. STAR should be lauded for encouraging outside researchers to take a critical look at its initiatives in the context of an effort to examine deeper change. This report marks the conclusion of an action-research study that utilizes control-groups, an important step forward in such studies.

## **Purpose and Scope**

This study examines several different modes of congregational change initiatives: Synaplex, different configurations of congregational consulting with a focus on long-range planning, and long-range planning efforts undertaken without outside consultants.

This study had several interrelated goals, which include: (1) advancing the emerging field of synagogue studies; (2) providing an evidence-based tool for considering variances in long-range planning in synagogues; (3) serving as a model of a control-group study (this is a first-ever control study of the impact of long-range planning on congregations); and (4) examining models and functions of congregational consulting. In terms of its exploration of STAR's Synaplex and Long Range Planning Consultation (LRPC) initiatives, this study tests the hypothesis that a congregation that has experienced initial cultural changes through the Synaplex process can consolidate, deepen, and broaden those changes with additional consultation. It examines the influence of the LRPC initiative on synagogues' vision and self-understanding as communities; assesses the degree to which the outcomes from involvement in the LRPC and Synaplex, such as the building of teamwork, insight and a shared outlook, are incorporated into the synagogues' cultures; evaluates the impact of the LRPC project on rabbis and other congregational leaders; and evaluates the impact of the LRPC and Synaplex initiatives on synagogues' overall organizational culture and functioning.

This 20-month evaluation focused on long-range planning efforts and their influence on the development of synagogue culture and functioning. The evaluation utilized a control-group methodology focused on four groups of stakeholders across nine synagogues: (1) rabbis and relevant synagogue staff; (2) synagogue board members and other relevant lay leaders; (3) representative congregants; and (4) professionals involved in the implementation of LRPC as well as in Synaplex.

## Methodology

### *Participant Selection*

Congregations were chosen through the use of purposive sampling; they represent geographic, movement, and institutional diversity and are constructed as three parallel groups. The first group consisted of congregations that participated in Synaplex for at least two years and were accepted to participate in STAR's Long Range Planning Consultation prior to the beginning of the research study. The second group also participated in Synaplex for at least two years and was either engaged in an early stage of a long-range planning initiative or about to begin one at the beginning of the research cycle. The third group did not participate in Synaplex and was also either engaged in an early stage of a long-range planning initiative or about to begin one at the start of the research cycle. All nine congregations are located on the Eastern Seaboard and are considered to be either mid-size or large congregations. The groups were chosen in part to contain representation from across each of the four movements.<sup>3</sup> Participation was voluntary, and congregations were ensured anonymity. Within each congregation we sought to engage with a variety of constituencies: clergy, executive directors, directors, related staff, lay leaders and representative members.

### *Research Design*

This study utilized qualitative research methods, including interviews, questionnaires, observation, e-mail writing prompts, and document review (Maxwell, 2005). The guiding questions across data collection instruments included: Did the planning process change the attitudes and direction of the congregations' leaders? Did changes in program, process and administration occur as a result of this planning process? Did the newly developed plans embody a fresh vision of the congregations' futures? Did the leaders believe that the process and plan had/will have a major impact on members and organizational functioning? What are the differences among the three groups of congregations? What are the central variables affecting the ways in which synagogues and the participants within them experienced and enacted the process? What is the influence of planning consultants? How did the LRPC and Synaplex initiatives influence congregations' processes and outcomes?

Data collection instruments included:

#### *Initial, Mid-Initiative, and End-of-Initiative Tools for Congregational Professionals and Lay Leaders:*

These questionnaires were distributed at the initial stage of the evaluation period to each respective group. Responses to the questionnaires served to establish baseline data that represents the participants' knowledge, attitudes and skills related to their participation in their respective long-range planning processes, including the LRPC and Synaplex initiatives.

#### *Mid-Initiative Evaluation Tools for Congregational Professionals and Lay Leaders:*

These questionnaires were distributed at a mid-point of the evaluation period to: (1) assess how the participants made sense of, utilized and experienced the information, expertise and resources provided by their various long-range planning processes, including the LRPC and Synaplex initiatives;

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<sup>3</sup> An attempt was made for better representation of Orthodox congregations. There is only one Orthodox congregation included in the study.

(2) understand participants' perspectives on the impact of these initiatives on their congregational ethos and their own development as professionals and volunteers, learning and engagement; and (3) detect shifts in participants' levels of communication with colleagues and lay leaders as well as their perspectives on their progress and areas of needed support.

*End-of-Initiative Evaluation Tools for Congregational Professionals and Lay Leaders:*

These questionnaires were distributed at the end of the evaluation period to each respective group to: (1) understand the participants' experiences vis-à-vis their development as professionals and volunteers; (2) learn about the congregations' growth and development around planning and leadership; (3) gauge the participants' overall experience of being involved in the LRPC and Synaplex programs; and (4) assess the degree to which changes and paradigm shifts have become internalized within these systems.

*Protocols for Interviews and Focus Groups with Congregational Professionals and Lay Leaders:*

A representative sampling of congregational professionals and lay leaders was interviewed at carefully selected points throughout the evaluation. The goals of these interviews were to explore in some depth the participants' perspectives on the experience of participating in their respective long-range planning processes, including the LRPC and Synaplex initiatives, in terms of their own development as professionals and volunteers, as well as their congregations' growth and development.

*Observation and Field notes:*

In addition to the above instruments, extensive field notes were recorded during the selected seminars and all interviews. The template for these field notes included guiding questions that prompted close scrutiny of participants' reporting on their experiences and the overall impact of the initiative in the areas of organizational development and change, leadership development, communication pathways and professional and lay leadership development.

*Archival Data and Document Review:*

Relevant archival data from participating congregations (e.g., mission statements, vision statements, strategic plans) and from the LRPC and Synaplex initiatives (e.g., statements of goals, mission, and agendas) were collected and reviewed.

Across congregations the primary goal was to understand the long-range planning process from the perspectives of the participants in the process. For the congregations that participated in LRPC, the criteria for gauging success included:

- The degree to which effective long-range planning was carried out and buy-in was achieved in the congregation.
- The degree to which the developed plans include substantial changes from the congregations' previous visions, as opposed to purely tactical planning, and the nature of any such substantial changes.
- The extent to which proposed changes reflect insights developed through participation in Synaplex and/or out of learning through LRPC training.

- The amount of attitudinal change on the part of volunteer and staff leaders over the course of the process.
- Congregations' completion of the program and recognition of its impact.
- Documented programmatic and administrative changes during the year.
- Existence for each congregation of a substantive, written five-year plan that is ready for submission to the congregation's board at the end of the program.
- Positive responses to survey instruments from participants.
- Recognition of the program in the broader community.

Across congregations, the criteria for success were primarily the development of a strategic plan and its impact on organizational development and institutional learning.

In order to ensure the validity of the research, the evaluation process was designed and carried out entirely by Sharon Ravitch. David Teutsch had no contact with the congregations for which he was not a consultant. Ravitch independently performed the data analysis and reached the conclusions published in this study.

## Findings

Each congregation had a unique structure, distinct goals, and a set of organizational dynamics that affected its processes and outcomes in a variety of ways. Examining their general commonalities and differences and their effects on their planning trajectories provided useful information about the nature of long-range planning processes in synagogues as well as insights into the roles and impact of consulting on congregations' planning processes. What follows is a section that provides a context for understanding the long-range planning processes across the nine participating congregations. This is followed by an in-depth discussion of findings based on our research with these congregations. The nine findings included here are inductive; they are grounded in the data collected throughout this evaluation. When possible, specific examples are provided.<sup>4</sup>

### ***Context: Looking across Long-Range Planning Processes in Nine Congregations***

As stated earlier, there were nine congregations involved in this evaluation.<sup>5</sup> Of these nine, three congregations participated in the Long-Range Planning and Consultation (LRPC) initiative led by Rabbi David Teutsch, a consultant with broad expertise in social systems, planning, not-for-profit organizations, the contemporary Jewish community and synagogue best practices.

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<sup>4</sup> Given that we have promised the participating congregations confidentiality, excerpts from data have been carefully selected and deidentified.

<sup>5</sup> It is important to note that there were two additional congregations selected to be involved in this research, both of which dropped out before the research formally began due to their decisions not to pursue their intended long-range planning processes.

Each of the three LRPC congregations was involved in Synaplex for at least two years prior to embarking on long-range planning, each was a mid-size to large congregation, and each had the full support and engagement of its rabbi, president and executive director (though this involvement looked different across them, which is further discussed in the Findings section). Two of these congregations were affiliated with the Conservative movement and one was affiliated with the Reconstructionist movement. All three of these congregations successfully completed each of the necessary stages of the LRPC and did so within reasonable compliance with the timeline laid out in their application process.

Of the six non-LRPC congregations, only one congregation had completed its long-range plan by the time of the completion of this study. One additional congregation, which was revisiting and redeveloping a previously written long-range plan, was, at the close of data collection for this evaluation, successful in that endeavor even while facing some amount of struggle with how to proceed on refinement of the statement and next steps. Still, this congregation had experienced success in terms of fulfilling the goals it developed on its set timeline. Three congregations engaged in what we are calling “components of a long-range planning process” though they did not successfully complete a long-range planning process.

- One of these congregations formed a strategic planning committee that focused on developing and refining vision and mission statements, conducted a survey and analyzed the resulting data to identify strategic issues for the congregation, and from that survey, created a “loosely organized” statement of goals and strategic issues. However, after these steps were taken, the congregation’s strategic planning committee stopped meeting consistently, and no further steps have been taken in over six months. They cited “lack of consistent volunteer engagement and initiative,” “rabbi renegotiation,” and a “lack of staffing resources” as the primary reasons for their halted process.
- A second congregation formed a long-range planning committee, though it “never quite cohered,” conducted “parts of a needs assessment” based on an existing needs assessment from its movement, reworked the congregation’s mission statement and began to develop a vision statement. However, after about six months of meeting, its long-range planning committee ceased to meet regularly, and volunteers became involved in other areas. Those surveyed cited “a problem with populating the long-range planning committee due to [their] relatively small size (350 families),” an emergent staffing issue, and a “lack of administrative power” as the main reasons for the end of the long-range planning process. As the chair of the long-range planning committee stated, “It just got stalled, we had to put too many fires to put out.”
- Another of the congregations that engaged in components of a long-range planning process formed a long-range planning committee, conducted two surveys (one for members and one for congregational leaders) to determine congregational demographics and core issues, engaged the assistance of a consultant from their movement to help with the formulation of their mission statement, and formed subcommittees around three identified areas of focus (from the surveys) for their long-range plan. These subcommittees never met, however, and the process “slowed to a crawl” despite an impressively high level of rabbinic support.

Those interviewed and surveyed cited an “overly chair-dependent process” as well as emergent financial issues as the primary reasons for the process “slowing to a halt,” stating that “The thing about long-range planning is that it’s long-range, so it’s never the immediate item on the agenda. If something has to get sloughed off, that’s it.” At the time of the close of data collection, this congregation reported “an increased interest in refocusing the long-range planning committee and process” after a six-month hiatus.

Each of these three congregations reported that, as members of two of them stated, their processes “got sidetracked,” but were hopeful that they would be “reinvigorated” in the near future. One final congregation completely ceased its long-range planning process after forming a long-range planning committee and bringing in an outside, independent consultant as a preliminary step. They did not decide to hire the consultant because there “was not Board approval for the expenditure,” and in the end the planning committee disbanded. They cite “waning enthusiasm” and a “lack of insight into the process” as well as an “ultimate discovery that their rabbi was leaving” as the primary reasons for stopping their long-range planning process altogether.

After close analysis of the data on these six congregations, no shared criteria – structure, movement affiliation, ideology, rabbinic investment, finances, goals, other initiatives involved with prior or during the long-range planning process, involvement in Synaplex – were found across these six congregations that helped determine their successes or challenges with respect to their long-range planning processes. The one variable that was shared only by the two congregations that achieved the most advanced stages of their long-range planning processes, which is also shared by the three LRPC congregations, was that their long-range planning processes were guided by consultants familiar with long-range planning and organizational development throughout the congregations’ entire planning process. For one of these two congregations, that consultant was an insider who was a marketing researcher with considerable consulting experience and who chaired the long-range planning committee. The other congregation utilized a consultant from an outside consulting firm hired to facilitate the long-range planning process and produce a draft of the long-range plan.

The four remaining congregations, as well as the two that dropped out prior to the beginning of the evaluation, did not use consultants in any regular way, if at all. Two of these congregations engaged in preliminary discussions with independent consultants at an early stage but decided that they did not have the financial resources to hire them to be a part of the planning process. Two congregations did not use consultants at any stage of the process.

Across all of the six non-LRPC congregations, there were efforts to gather and utilize written resources from movements and independent sources, including planning guides, data collection instruments such as surveys, and online examples of successful long-range planning processes, but these were used only at discrete stages of the process and often, as one member of a long-range planning committee stated, “felt out of context and so not as useful.” As stated above, in each of the four congregations that did not fulfill their expected timelines for completing their long-range plans, internal issues such as rabbi turnover (1), rabbi renegotiation (2), staffing issues (3), emergent financial issues (4), a lack of volunteer engagement (5), and a lack of support in the leadership of the long-range planning committee (6) were cited as reasons for delaying or halting their long-range planning processes.

## ***Finding One: The Variation of Understandings of Long-Range Planning Consulting and its Implications and of Approaches to It***

As stated in the section on participant selection, the participating congregations differed in a variety of ways including: size; resources (finances, knowledge and commitment among clergy, staff and members); roles of the clergy, staff and lay leaders; histories of the organizations; movement affiliation; ideology and commitments; participation in Synaplex; and other aspects of organizational culture. What we found is that beyond these differences, it was congregations' awareness of the value of consultants and understanding of the uses of congregational consultants (as well as their approaches to seeking out and utilizing consultants) that impacted whether they reached out to enlist the help of consultants as a part of their long-range planning. The use of consultants was the prime determinant of the success of their planning efforts. Part of congregations' choices regarding the use of consultants for long-range planning related to the congregations' funding and resources, part of those choices was about exposure (or lack thereof) to consultants and their range of services and fees, and part of their choices was about how they viewed the use of consultants in relation to their goals and objectives.

Several of the congregations stated that they did not see themselves as needing outside consultation; others saw the use of consultants as being beyond their financial means, and still others did not know that such resources existed through their movements, outside institutions, and other community-based organizations. Given that there is an array of consulting services provided not only by independent consultants and consulting firms but also through each of the movements as well as a number of not-for-profit organizations, the lack of knowledge about such offerings is significant. It seems noteworthy that many of these congregations' members are exposed to organizational development consultants in their professional lives but did not seem to make a connection between organizational change initiatives at work and in their synagogues. Given our findings about the impact of consultants on the success of long-range planning processes, this lack of awareness, knowledge and access is an important area for additional focus and inquiry.

As stated in the Context section, the five congregations that used consultants intensively throughout the long-range planning process were the most successful in our sample. We found, quite clearly, that the use of consultants through the entire long-range planning process directly shaped congregations' planning efforts in specific ways regarding both processes and outcomes. These differences and their implications offer significant insight into opportunities for organizational change and growth because they point to a profound lack of understanding on the part of most congregational leaders of the benefits of working with congregational consultants and of access to them. This lack of awareness likely reflects both the decentralized nature of the field of synagogue consulting (see Newberg, Ravitch & Teutsch, 2007) and a lack of exposure to successful models of congregational consulting in the United States.

One of our findings in this area is that the use of consultants for only some parts of a long-range planning process was not sufficient and did not lead to success in the long-range planning effort for any of the congregations in our sample.

- As one rabbi said of his movement's consulting offers, "This idea of having consultants who are pros in the field is enormously refreshing because when [our movement] organizes these things, they ask other local synagogues to do a show and tell, they don't bring in the pros... so then lay people come away from those sessions not feeling like it was worth their time. So we are ignoring [our movement] invites. It is crucial to be having sessions with serious consultants in synagogue organization with the expertise and the experience that are essential and useful."
- Another rabbi, when asked about the use of a consultant in his congregation's successful long-range planning process, commented, "*Ayn Navi B'iro*. If you want to be regarded as a prophet, you cannot be one in your own town. You need to bring in outsiders, outside consultants because internal ones would not work.... [Rabbi Teutsch], because he has worked with so many other *shuls* in the synagogue change process, sees how to make sense of the data in relation to our specific situations and needs and goals. He laid out a clearly defined and focused process and timeline. The long-range planning process can work but it has to be clearly defined; his experience is a background to ensure that it will, and that he is available to help with the structure is essential."
- Still, another person interviewed, a president of one of the LRPC congregations, stated, "Without the consultant there's no way we could do it.... I saw the value, the process got better because I saw the consultant actually pushing us in a direction. Without that kind of pushing, it would be too big to tackle. It would not be organized or professional without them."

Indeed, in our sample, the intensive, ongoing use of a talented, invested and experienced consultant directly influenced the success or failure of a long-range planning process. This will be further discussed in the fourth finding section, *The Impact of Consultant Knowledge, Skills, Approach and Positionality*.

### ***Finding Two: Readiness Factors for Long-Range Planning***

One of the key criteria for success in long-range planning is readiness. What we have learned throughout this research is that congregations do not necessarily understand or properly self-assess their readiness to embark on a long-range planning process. Furthermore, congregations often do not know what they need to do to become ready to engage in an effective change initiative. In the course of conducting this research, we concluded that the following criteria help to determine if and when a congregation is ready to engage in a long-range planning process:

1. *Stable professional leadership.* The leadership of the rabbi (and where applicable, the senior rabbi), and executive director or administrator, must provide stability for the congregation in order for it to be able to engage in a long-range planning process that will be sustainable. The rabbi must have been in place for at least a year and have plans to remain with the congregation for the foreseeable future in order to ensure that the rabbi has the credibility and support to play a sufficient role in forging the plan and that the vision embodied in the plan will not shift radically during the plan's implementation. The executive director or administrator will generally have to provide major administrative support for the planning process.

2. *A group of lay leaders prepared to commit to the process.* A synagogue needs to have the commitment of its officers to planning and implementation of the plan. In addition, key lay leaders must play active roles on its long-range planning committee. Active engagement is required not only during the planning process but for the implementation stage as well. Explicit discussion of the nature of this commitment in terms of time and energy required during planning and of the number of years involved in implementation is needed to ensure the success of the plan.

3. *Ample organizational energy.* A long-range planning process requires considerable focus and energy, which is unlikely during a capital campaign, during a period of major turmoil over an ideological or other congregational issue, or during a short-term crisis. The crisis could be of several types—financial or financial management, personnel changes, insufficient lay leadership, program breakdown, sudden demographic shifts, or membership destabilization, to name a few. Therefore, a congregation's leaders need to consider the timing of its long-range planning process in relation to other organizational issues and processes.

4. *Sufficient repertoire of experience and skills represented on the long-range planning committee.* A long-range planning process requires that the long-range planning committee be comprised of members who have a range of experiences and skills, including marketing, financial, fundraising, organizational and programmatic skills. If these skills are not present within the committee itself, the committee needs to consider its financial capacity to bring in consultants with these skills and to be able to compensate them as needed.

5. *Sufficient staffing for the project.* Long-range planning, both during plan development and during implementation, requires the ongoing support of the professional staff. This requires the buy-in and vision of the senior members of the professional staff. Across congregations, the rabbi plays a critical role, and support staff need to coordinate logistics and provide clerical and administrative skills to the ongoing effort. Without a senior staff person to coordinate logistics, serve as a liaison between all the people and processes involved and provide ongoing accountability for consistent planning and communication, the planning effort is at considerable risk.

6. *A shared, critical understanding of institutional process and functioning.* There must be a shared understanding and acknowledgment among the key players within the congregation that a unified vision and clear direction would be helpful to the congregation. The primary participants must understand that organizational change will require a re-examination and perhaps the shifting of roles and accountability. The need for reflection and change must be explicated and communicated to the broader lay and professional communities of the congregation.

7. *Buy-in.* There must be informed agreement to embark on a long-range planning process by the board and other key opinion leaders. There must also be a broad-based understanding of the need for change initiatives and for a strategic plan for the congregation. Involved participants must be informed about the commitment that is being made by individuals as well as by the various constituencies (i.e., clergy, committee members, and staff) and about the roles that they will play collectively and individually.

For all six of the congregations that participated in Synaplex for at least two years prior to embarking on a long-range planning process, Synaplex clearly helped to create readiness for key organizational shifts such as the development of team thinking and committee coordination, the recognition of the need for program redesign, an increased acceptance of use of technology for marketing, and clearer thinking about goals and objectives. Nonetheless, we found that by itself, Synaplex does not seem to yield significant, measurable results in terms of guaranteeing success at long-term planning. Quite importantly, though, it does facilitate substantial programmatic innovation in the context of increased teamwork. That supports a modest level of cultural change as well as an awareness that more can be done to affect deeper cultural changes. We argue, based on this research, that Synaplex should be understood as providing a foundation upon which other initiatives can be implemented. Synaplex helps in the development of several key readiness factors for a significant and successful long-range planning process (this will be further discussed below in Findings Eight of this report, *The Impact of Synaplex on Long-Range Planning*).

### ***Finding Three: The Role of the Rabbi and Differences in Congregational Structure***

Several other issues affect the factors leading to successful long-range planning. One major issue that emerged in this research was the ways in which the rabbi's role shaped the process and outcomes of the long-range planning process. The role of the rabbi as well as the expectations of the rabbi's roles in a congregation proved to be important factors in a congregation's long-range planning process. In some congregations, the rabbi functions as the *mara d'atra* (person who is the decisor). In other congregations the rabbi functions as and is expected to be the Chief Planning Officer, Chief Spiritual Officer or the Chief Executive Officer of the institution. In some congregations, the rabbi is expected to fulfill many if not all of these roles, which produces its own set of concerns in terms of synagogue change initiatives. A closely related set of issues pertains to the role of the executive director. The roles of the rabbi and of the executive director have much to do with each other and at times, clarification is necessary in order to consider their respective roles in the long-range planning process as well as more broadly.

One factor that emerged was the rabbi's own expectations of role. For example, there was a difference in whether rabbis saw their role as clergy as a vocation at the center of their lives or a profession to be kept within limits to avoid undue intrusion into their personal lives. There was considerable variety among the rabbis' own sense of life balance and the effort required to maintain it. For example, there were several rabbis, all of them on the younger side, who showed concern about their personal spiritual growth, having adequate family time and not overworking, and for these rabbis there was less time to function as executives because they had little professional time once they completed their tasks as pastors, educators and spiritual leaders. On the other hand there were a few cases where the rabbis' lives revolved around their rabbinic roles, and they exercised little self-protection. This had implications for their level of investment with the long-range planning process and more broadly in their roles in their congregations.

Another factor that emerged is the major impact of a struggle for control and leadership involving the rabbi. For example, in one congregation, when the rabbi asserted greater control in the planning process, it made the laypeople anxious and unhappy, but when he tried to be responsive to this and relinquish some control to them, he (and they) struggled with their time-consuming, process-oriented approach. One thing is clear across all of the congregations: the rabbi's role in long-range planning needs to be clearly articulated and mutually acceptable for the process to move forward smoothly and, further, tasks need to be suitably allocated among the rabbi, executive director, staff and lay leaders in order to adequately support a fluid and open planning process. What we found is that there are many possibilities for configuring roles and tasks and that as long as there is mutual acceptance and clarity, it seems that almost any of them can work. As the planning process proceeded, there were times when responsibilities and role divisions needed to be renegotiated. When this occurred openly and easily, it was a major aid to the planning process. Because the redesign of governance systems is a major aspect of planning, the development of an understanding of the synagogue as a system and having a process for explicating interpersonal dynamics was central to the success of planning processes. As the congregations' planning committees contemplated the future and engaged in planning, the way they designed professional and lay job descriptions and the ways that the two were brought into harmony were profoundly affected by how each congregation's leaders perceived the ideal role of its rabbi and what each congregation's expectations were of how its rabbi should function.

One thing that became clear is that the ideology, demographics and resources of congregations shape the expectations of the rabbi's performance. In one congregation that fit more within a more traditional, halakhic framework, for example, the expectations held by congregants for the amount of the one-on-one professional time available to them was defined and limited. Other congregations that have larger numbers of younger people, more highly educated and professional members, and a higher average household income seemed to have moved into a congregational model where there is an expectation of a higher level of personal service and engagement. This had a significant impact on staffing in general and the rabbi's role in particular. When a congregation stresses greater community and relationship building—a direction emerging in many congregations—that is a time-intensive approach for professionals as well as for volunteers. The congregation therefore needs to think about staffing issues in relation to those cultural shifts, which in turn impacts finances and issues of organizational design as well.

Each of these issues has implications for long-range planning efforts in synagogues. It was among the LRPC congregations that creating an awareness of these issues and dynamics and providing useful approaches for explicating and addressing them seemed to occur most effectively. The belief held by those congregations' consultant is that it is not for the consultant to pass judgment on any of these rabbinic stances, but rather to attend to the fit between the various roles among the key players in the synagogue's life both during the long-range planning process and beyond it. In this sense a consultant ideally works to respond to each congregation's needs, skills and culture in ways that are adjusted to local conditions.

### ***Finding Four: The Impact of Consultant Knowledge, Skills, Approach and Positionality***

This finding pertains to consultant competencies, consulting objectives and ways that consultants introduce new processes, insights and skills. All of these variables became important in figuring out strategies to employ in order to meet objectives in a long-range planning process. In the three LRPC congregations, there was in-depth consulting involvement throughout every stage of the long-range planning process over a 14-17 month period. The consultant, supported by an administrative team and an apprentice, worked in focused and customized ways with each congregation. This began with guiding committee selection and setting committee expectations and continued with a separate 1-1½ day retreat for leaders of each congregation. This consultation was supported by a cohort model wherein eight monthly joint seminars for the three congregations supported development in areas such as endowment and capital fundraising, team-building, mentoring and supervision, segmented marketing as a tool for constituency building, strategic thinking about the worship experience, and shifting congregants' roles from consuming to citizenship. As stated above, in four of the six non-LRPC congregations, there were different configurations of consultant involvement, and this seemed to impact process as well as outcomes. Two congregations utilized consultants in intensive ways throughout the long-range planning process. Outside consultants were hired or brought in through movements on a spotty basis by two of the six congregations. Two congregations did not seek out or utilize any outside consulting. The four congregations that either partially used or did not use a consultant seemed to be lacking a focus on deliverables which resulted from their lack of a clear timeline as well as a lack of accountability. This resulted in their processes floundering, as seen across the congregations that decided not to continue with their long-range planning processes. What became clear across these four congregations is that without guidance of the long-range planning process by someone who had in-depth knowledge of planning, the long-range planning committee was not hearty enough to withstand all of the other pressures of synagogue functioning. Thus only one of the non-LRPC congregations completed a long-range plan in the 16-month timeline of the evaluation, while one other achieved its slightly different long-range planning goals, whereas all three of the LRPC congregations completed their long-range plans and experienced the process as a "lightning rod for institutional change."

Based on our findings, it is clear that it is important but not sufficient that synagogues seek out consultants to help them. To be effective, consulting must involve an intensive process of considerable collaboration with the participants throughout the long-range planning process. This requires that the consultants themselves possess a critical understanding that long-range planning in synagogues must incorporate various kinds of organizational learning. Based on our study of these nine congregations, both those that had successful long-range planning processes and those that did not, we have learned that in order to facilitate a successful long-range planning process that incorporates this knowledge, there are six kinds of expertise that a synagogue consultant needs to develop. While all six are not necessarily needed in every case, the nature of long-range planning consultation is particularly broad, and aspects of all six generally prove useful. A wise client should evaluate the organization's needs and the available consultants' skill sets in deciding with whom to enter into a contract.

The six areas of expertise are:

1. Knowledge of Jewish tradition, values and texts. A solid and in-depth understanding in these areas is important for helping in congregational decisions that should draw upon Jewish values; for grounding synagogue leadership in Jewish vocabulary, leadership models and principles; for connecting the consulting process to such Jewish practices as text study; and for framing synagogue leadership as holy work.
2. Knowledge of contemporary Jewish demographics and the structure of the Jewish community. This knowledge is critical for helping clients understand their potential constituencies, organizational partners and competitors; and the implications for recruiting members and volunteers, for designing programs and selecting staff, and for assessing opportunities and threats. It also opens possibilities for where congregations can turn for help, programs and large-scale alliances. Understanding synagogue and movement ideologies and their implications for decision-making patterns, divisions of work, and organizational design is critical for consultants' diagnostic capacities.
3. Understanding of contemporary best practices across fields. Sophisticated research models and practices have developed in the not-for-profit world in general and the church world in particular. As congregations become more sophisticated, they will increasingly draw effectively on best practices from these spheres, and particularly from best practices emerging from other synagogues. The best consultants will be familiar with all three of these spheres—the state of the art in not-for-profit practice, in church studies and particularly in cutting-edge practices among American synagogues.
4. Interpersonal skills and sufficient experience. Consulting is an art that involves contracting, relationship building, the generation of trust, sophisticated listening skills, the capacity to conceptualize and teach with clarity, and the ability to motivate, supervise and impart skills. Expert consultants have usually benefited from skilled supervision and considerable experience.
5. Significant exposure to and critical understanding of theoretical literature. There exists a substantial theoretical base that is important for working with organizations. This includes the literatures about organizational culture, organizational change, leadership, systems theory, group work, psychology and community organizing, to name but a few. For consultants to understand what they observe and know how best to respond, they need deep roots in fields that provide concepts, modes of analysis, diagnostic tools, and strategies and tactics for bringing about desirable results. Those who have learned just a few tools that they can use in a hands-on way (such as SWOT analysis or the administration and interpretation of Myers-Briggs tests) but do not have deeper roots in theory will be limited in their capacity to achieve lasting change.
6. Exposure to sub-specialties needed for long-range planning. Increasingly the field of synagogue consulting has developed sub-specialties. These sub-specialties include marketing, capital campaigning and other aspects of resource development, strategic planning, coaching, conflict resolution, leadership development and training, volunteer recruitment, interventions following financial or sexual boundary violations, financial management and investment policy, technology, liturgy, programming and education.

Each of these sub-specialties has its own body of knowledge and practice. While some generalists have at least some expertise in all these areas, as is needed for strategic planning, many consultants have deep expertise in only one or two.

Clearly, there are various styles of long-range planning consultation and approaches to it. Some consultants serve as outside professionals deeply involved in each stage of the planning process. They attend meetings, act as secretary and question-poser, and help to document and accumulate data and evidence-based understanding. Other consultants see their role more as professionals who facilitate the process and make certain that insiders fulfill the above roles but who consciously and strategically intervene at what we are calling “critical moments of consulting,” including moments of confusion, frustration and struggle, to offer valuable outsider insights about the process and to provide knowledge and insights from outside congregations and the broader not-for-profit world. Consultants ideally have a solid working knowledge of various organizational-change models and processes and can access that knowledge, as well as guiding theoretical frameworks and concepts important to organizational planning and change in synagogues.

Each congregation in this study had a unique process, structure and set of needs so that the consultants needed to adapt to local situations. This required a sophisticated, practical set of skills, methods and techniques that were also grounded in theory. At times the consultant needed to help with something as concrete as training committee members to conduct focus groups. At other times the consultant acted as guide to local process issues, sensitizing participants and helping them understand relational dynamics like who needed to speak with whom to create healthy relationships and momentum for collaborative engagement. This research has taught us that central to these consultants’ effectiveness is their ability to develop a set of relationships in which there is trust and a willingness to grant authority. Some of that was about the consultant’s knowledge and expertise, but some of it was about the savvy, charisma and relational intelligence of the consultant as well.

One thing that became clear in the research is that congregations need consultants who are available from the beginning of a long-range planning process to the end. They need focused and knowledgeable assistance with navigating the process from the time they are considering whether to do planning and how to create and charge a planning committee. Later on, consultants provide help and guidance at what one of the participants referred to as “stuck points,” which often include process and competency issues. Our observations showed that when a consultant was invited to participate only in a launching retreat or an orientation or for another early stage of the process because the congregation did not budget for more of the consultant’s time or did not see a need for more intensive, ongoing consultation, there were subsequent breakdowns in every case.

These breakdowns took several forms, including certain parts of the process failing, critical stages of the process not getting accomplished in a timely fashion or at all, or a shallow version of the process taking place without deeper work, change or buy-in. In three cases, the process as a whole derailed, and no plan was finished. Another unfortunate congregational error involves reaching the end of a planning process without providing any meaningful plans for implementation. These outcomes were shared by all of the congregations that either used consultants in limited ways or did not use consultants at all.

The prevalence of these breakdowns in congregations without access to sufficient ongoing consulting demonstrated that in addition to the specific knowledge base needed for planning, the consultant must have the time and the skills necessary to communicate regularly and clearly with congregational leaders in order to identify sticking points, manage conflicts and overcome impediments to the planning process. Significant skill at intervention is needed to avoid most potential sticking points and, when they occur, to coach leaders so that they understand how they went off-course and how to get the process back on track.

Our research indicates that key leaders were very slow to identify on their own when or how they were stuck or needed help. One reason why is that most congregational leaders did not have a sophisticated understanding of long-range planning and what it entailed. They therefore did not spot the warning signs of problems. Their lack of sophistication was also reflected in the lack of value they attached to consulting help, as reflected in their failure to sufficiently budget for outside support for the process. In some cases even though congregational leaders valued such consulting, they did not believe that the congregation had the financial resources to hire a consultant on a longer-term basis.

This study shows that the impact of a highly skilled, knowledgeable consultant who is actively involved in the process in an ongoing and strategic way is often determinative of success for the planning project. Congregations that do not share this view of the process either involve a consultant who helps them start and then proceed without further help or a consultant who takes on particular pieces of the process but does not fully help with the design of a successful, holistic planning process and of its implementation (which is a sophisticated activity that requires considerable skill). Congregations need not only the commitment to hire a consultant, but the insight to hire an appropriate consultant in terms of knowledge, skills and capacity to build trust and rapport. Selecting an appropriate consultant and contracting properly with that person requires skill on the part of the congregation's leaders. This skill is as essential to attaining desirable results as is the commitment and work needed to ensure the success of planning both during and after the process is complete.

What follows are statements by congregants involved in long-range planning processes that used consultants throughout the long-range planning process in intensive and highly individualized ways. Together they speak to the range and variation of roles that a skilled consultant plays in the long-range planning process:

- An LRPC participant stated, “We called upon the consultant a lot.... At first we weren't sure how to begin, and then once we began often didn't know where to go.... We often got in touch with him to clarify as we moved through different steps.”
- The rabbi of an LRPC congregation who was asked about the most valuable part of the long-range planning process said, “[The consultant's] personal consultations were the most valuable component. Whenever we needed guidance, his advice was “right on target” and kept us focused toward achieving our goal. In particular, he was invaluable in introducing us to the methodology of the LRP process during his launch retreat with our key stakeholders, as well as the seminars in which he was the instructor and resource. The other outside experts in marketing and in fiscal development work [who led seminars for the three LRPC congregations] were very helpful.”

- A co-chair of one of the LRPC congregations remarked: “There are inherent tensions in the process. David has a clearer idea of the direction, about the steps of the process. So they are letting us learn, not being pro forma consultants. But we are missing pieces. Without the consultants, we would not know a way [to do this]. The consultants hold it [maintain the process] as we learn. I feel that there is an appreciation of how much is involved in the process that we could not know without professionals. They chart the course but also empower us. They are attentive to the fact that we have a responsibility to shepherd it ourselves and that it is a tender negotiation.”
- An executive director talked about the importance of the consultant being an outsider so that he can step into organizational dynamics in ways that an insider could not, commenting that “the consultant is crucial, to have an outsider leading us, we feel like he is shepherding us, keeping us on timeline, they keep the pace going. There is pushback from some of the leadership, and the consultant has addressed this in a way we can’t, and that has been essential. The consultant is very available, and we’ve needed that.”
- The rabbi of an LRPC congregation noted, “The outside consultant is critical. He’s taken the role of keeping us on task, and that is central because in the first months we needed an outside person to keep us on task, and he is in the process to help notice where things are slipping. It has been very helpful, David holding the larger frame for everyone. Our executive director or president could not have done that; there are too many other synagogue things on the plate.”
- One member of an LRP Committee stated, “[The LRPC] has gotten people excited, so it is more than just a local committee, it puts more importance on the process because there is an outside person as a facilitator, which made it feel more important. He was able to direct the crowd and keep things under control, to keep people directed, enthused, he’s someone who can step back and look at the overall picture of things. Without that, everyone hones in on their own little thing and does not look at the big picture. That’s a problem for committees—they all have their own purview, but this opens it all up, to give everyone an overview and get them on board, to keep people directed and working... so [an outside person] creates greater accountability... so people are working harder and faster.”
- An LRPC member at a different congregation remarked that: “The role of the outside consultant... his background, helps us with questions and leads us in a thought process, streamlined it, there are a few things that put lights on in the head, were brand new. Many of us on the long-range planning committee have been involved, so we have a sense of the things that need attention, so David made it worthwhile, disciplined us, kept us on time, helped us to face particular issues but moved us on... so that’s what he did, focus us... I appreciate the ability we have to be able to call David, it is good to have him as a resource.”

- Still another LRPC participant said that “The role of the consultant in the LRP process is that he offers good information about where other congregations are and vast knowledge of literature on synagogues and churches as well. As a synagogue there are particular challenges of growth, so the information is very useful. It is a way of keeping us on track....His knowledge and the structure of the process is helpful because it is such a daunting process. The consultant creates accountability and a timeline, [and is] committed to multiple perspectives. David helps us to mediate, figure out our differences....”

These comments speak to the central and complex role of the consultant in these successful long-range planning initiatives. They also address the knowledge, skills and commitments needed in this form of consulting, thereby pointing to an ideal toward which long-range planning consultants should strive and against which they can be measured. The comments also reflect the importance of the consultant’s capacity to function as an outsider who can intervene in ways that insiders cannot due to blind spots, politics and/or organizational dynamics.

### ***Finding Five: The Impact of Planning Processes on Congregational Learning and Change***

Across the nine congregations studied, we saw varying degrees of success with the long-range planning process and varying degrees of congregational change. Across the six congregations that engaged in less intensive planning processes, even the two that developed strategic plans, there is not a sense of significant organizational learning beyond isolated moments or narrow areas of discrete learning. While there were points of such learning across these six congregations, such as perspectives gained on their missions, goals and vision, these did not seem to lead to significant organizational learning because there was not sufficient professional or lay development to support such learning.

For the congregations that engaged in LRPC, the long-range planning process created major change through the development of in-depth professional and lay-leader development, reorganized committees, added committees, rearranged reporting structures, and parallel changes on the staff side. These changes required large-scale buy-in and a recognition that the change required was not simply programmatic, but cultural and structural as well. The structural changes were reflected in tables of organization, charges to committees, job descriptions, new hires and other internal documents. These kinds of changes promise considerable long-term impact because they created a critical, shared understanding of the synagogue as a learning organization, as well as shared focus and energy on change initiatives that are tied to a broader institutional vision that is clearly articulated and understood. We observed in the LRPC congregations that these changes included deep change in the collective vision and culture, and a much more substantive understanding of institutional functioning, which includes an understanding of objectives, the impact on structure, staffing and the like.

For example, open discussion became accepted about the balance between volunteers and staff in decision-making processes and task execution, leading to shifted outcomes and a greater capacity for such discussions in the future.

For the LRPC congregations, the entire planning process was designed to engender significant, long-term organizational change. This began with in-depth launching retreats that provided participants with structured processes in which participants learned the skills needed to engage in self-assessment and confront their current functioning in the light of their espoused way of functioning (Argyris & Schon, 1978). For example, congregational leaders learned to think about their existing mission statements in relation to their congregations' actual activities and commitments at the time of embarking on the planning process. To support this learning there were exercises aimed at helping leaders gain perspective on what is important to their congregations' members and to understand the range of present and potential constituencies for their congregations. This process threw their ideas about their missions into stark relief and caused an energized rethinking process that enhanced their ability to deal with issues of both breadth and depth and the need for substantive change. What we discovered is that when this process was done well and then threaded across the planning process, participants were able to confront the differences between espoused theory and theory in use in meaningful ways that interrupted the status quo (Argyris & Schon, 1978). Engaging them in this way proved to be an important part of creating the momentum necessary for preparing the leaders of the congregations to become active conduits for their congregations' organizational change. Helping participants to understand the importance of reckoning with potentially negative and possibly dispiriting information about what was really going on in their congregations, while at the same time providing doable solutions, clearly enabled them to feel excited about possibilities for institutional growth and development even as they confronted some less-than-ideal realities of their current functioning.

Observing the contrasts between the LRPC congregations and the other six congregations helped us to see some additional aspects of long-range planning offered by the LRPC initiative that helped facilitate a deeper kind of organizational change. One was a full program inventory that required creating specific program objectives (tied to vision and mission) and categorizing all the programs of the congregation by objectives and populations served so that an assessment could be carried out regarding which constituencies were over-served and underserved in each of the program areas. This then raised questions about the nature and effectiveness of the communication measures by which each constituency learned about programs and was drawn into greater participation. Engaging in this process meant that the congregations examined the cultural artifacts of their institutions in an effort to evaluate if and how each of the communication levers was working in relation to others. This included a close scrutiny of all mailings, newsletters, letters and brochures, as well as email, phone and face-to-face communication. Exploring the implications of an ideal program for marketing, physical space needs, staffing and volunteer efforts, and therefore for budgets and resource development, helped committee members understand the complex interactions among all the different parts of their congregations. This type of review clearly facilitated a kind of institutional scrutiny and reflection that helped to promote change at the level of organizational culture. Committee members learned to be attentive to the fact that organizational change requires the use of many different cultural levers and that those levers need to be moved in a tightly coordinated fashion. Additionally, participants were exposed to models for alternative approaches to issues, requiring thoughtful analysis and communication. Creating infrastructure changes that were the consequences of a renewed vision, mission and objects required consideration of internal political issues and points of tension and resistance. Open discussion of these concerns proved essential to significant organizational change.

Another major difference between the LRPC congregations and the other six congregations was that participants learned to critically understand issues like data-based decision making, measurable outcomes, how to conduct solid self-assessment and evaluation, and the use of these data to support the successful development of teams and leadership development initiatives. This kind of familiarity and comfort with research is a key tool for organizational change and continued implementation. One example of this is that the LRPC congregations learned about the importance of collecting data from their diverse constituencies through data collection methods like focus groups. Leaders participated in data collection of this type, in analysis of the data, and in confrontation with errors in the organization's previous self-understanding and then collectively considered the implications for change in program design, outreach and consequent administrative changes. Learning the need for this kind of data generation and analysis proves central to ongoing organizational learning and will have a continued impact on organizational learning and change.

Other tools that the LRPC initiative employed to facilitate organizational change included working with congregations to critically understand their own goals and to understand the importance of having systematic ways of approaching specific areas of the planning process. For example, across the three LRPC congregations, great emphasis was placed on thinking about relationship-based fundraising and about the complex nature of organizational growth and development. For example, one congregation re-examined its stated goal of increasing its membership and decided it should consider an increase from 250 to 400 households over the life of its plan. The planners needed to see the systemic impact of such growth on the congregation's programming and staffing, including adding an assistant rabbi and hiring an executive director. This led to fresh thinking about communication, community building and resource development. Mapping out a plan that addresses all those issues highlighted the congregation's longtime difficulty with recognizing supporters, a critical aspect of the needed resource development. The plan created urgency for addressing that festering issue, which has manifested itself repeatedly during almost the entire history of the congregation. This led to a major initiative after the plan was approved that involved engaging the whole congregation in dialogue around the moral and practical issues raised by how a congregation recognizes the many kinds of support it receives. A fresh policy direction emerged from that dialogue.

Another congregation's leaders came to the conclusion that the committees of the congregation needed major reinvigoration, that this required a new system of officer supervision of committees, and that this in turn required substantial training of officers and committee chairs in effective volunteer recruitment, task delineation, and evaluation processes. Shortly after the congregation's plan was ratified, a well-attended half-day training session launched the congregation's new leadership development program.

A final point about the impact of planning processes on congregational change is the need for ongoing support on the part of the consultant after the long-range plan is complete. It is often during the transition from planning to implementation that questions and issues arise. For example, all three of the LRPC congregations went back to the consultant after the ratification of their plans for additional assistance in order to accomplish the changes conceptualized in their plans. The consultant facilitated an evening process around recognition issues for one congregation, provided a half-day of training for another and coached the president and a committee chair of the third.

The leaders of the congregations realized through the planning process that the level of complexity involved in some kinds of change is such that outside expertise has great value. They also realized that continued reflection and analysis is needed in each of the areas where plan implementation will take place in order for their efforts to be effective and aligned with one another. These issues include fundraising, community-building, marketing, programming, leadership development, administration and governance. . The leaders of these institutions have internalized an awareness of the complexity of the process. Below are statements from participants about the impact of their planning processes on learning and change in their congregations and in themselves as leaders in their communities.

- A staff member involved in the LRPC process stated, “For me it was a whole learning experience about how the synagogue works. It was a real lesson, how a congregation functions.... The process has been wonderful for the congregation.”
- One rabbi said, “In terms of what the planning process has been like, it has meant opening up for discussion a wide array of previously ‘given’ institutional assumptions—leading to constructive change.”
- When asked if the LRPC process has changed the synagogue’s overall culture and functioning, one rabbi responded, “Yes. In particular, we have a “can do” culture – in which the clear single goal of staff and/or committees was to create an effective program. Now we have learned that equally important is that the process of creating the program builds as large a group of stakeholders (lay volunteers) as possible. Cultivating volunteerism has now become a huge priority for us.”
- A rabbi commented, “We are way into the LRP process. The LRPC process keeps us focused, even during the by-laws revisions. It lets us bring out our old LRP’s and do teachings about them, so we are creating a shared discourse that is reflective and allows us to move forward. . . . (A lack of that shared understanding) has stymied generations of leaders, and now a synergy is building.”
- An LRPC member remarked, “From our perspective, we are committed to making the changes we develop. We are asking the questions and truly committed to the process and to implementing it. That will be the whole thing, not just the process of the long-range plan but to DO with it. I feel it will maintain momentum and commitment needed to make changes. Now it is not a blank check given to committees, David and the process mean that there is broader buy in.”
- One synagogue president noted early on in the planning process that “We had a big retreat, 35-40 people came, with David, and another 20 came out to the second one, so that is 20-25% of the congregation that is really involved, and we feel a difference based on that. It is too new to really tell, but people have knowledge that it is going on, that there is a change process in the works. So we get the information—if we have something to say—to committee members. [They know] it will matter, your voice will matter, and that has already been good for the whole congregation.”

- One rabbi said, “We have already had a very meaningful conversation this year about recognition for financial and non-financial gifts to the synagogue. We have enacted changes to our by-laws that will, I think, strengthen our synagogue leadership. Good work has happened around defining job descriptions for our professional staff and volunteers. We have developed a five-year budget based on the assumptions of our Long Range Plan. I would say that the work of changing the culture of [the synagogue] will be a longer process. The one thing that I think could strengthen this program was more ongoing work with David Teutsch. I think that even checking in periodically over the next couple of years would make a big difference in terms of the effective implementation of this plan.”

These statements speak to the ways in which consulting, when designed around a value of developing the institution as a learning organization and facilitating both short- and long-term organizational change, can engender significant professional and lay leadership development and foster meaningful, lasting organizational change.

### ***Finding Six: The Role of the Consultant on the Impact of Long-Range Planning and on Leadership Development***

This research has shown that how the long-range planning committee functions is affected by the roles of the rabbi, the executive director, the committee chairs and the president. We saw these differences in role play out across the nine congregations in a variety of ways. In some cases, it was clear that the key players understood how critical the process was and were therefore active participants. In the case of the three congregations participating in LRPC, the rabbi and president had a very clear sense of the importance of the process and of the necessity of their active buy-in and support. This understanding proved critical to the success of long-range planning because primacy was placed on the process and its success.

An important aspect of leadership development pertains to who becomes involved in the work of the long-range planning committee. Future presidents need to be on the committee not only so that they will develop a commitment to implementing the plan that they have helped mold, but because participation in the discussion will change the way they perceive the congregation and lead it, increasing the likelihood of ongoing organizational learning and change. This kind of understanding of organizational dynamics was imported by the outside facilitators, who had knowledge of organizational change. In the case of the three LRPC congregations, and in the congregation that had a consultant chairing its long-range planning committee, all four had in common that their upcoming presidents were knowledgeable about and involved in the process, which is critical for implementation. Still, the relationship between the rabbis, executive director and key laypeople varied. In some cases, the rabbis steered the process, and in other cases it was considerably more lay-driven. In some cases, the rabbis did more administrative tasks, and other rabbis relied more heavily upon administrative staff or volunteers. We found that there is a continuum of leadership involvement and positioning across the congregations, and that this was not an important variable in predicting the success of the congregations in meeting their goals. Rather, a key factor was the clarity with which the participants understood their relative roles in the process, and their responsibilities and accountability.

In the case of the three LRPC congregations, the consultant asked questions about who would do what and how things would be accomplished, and he monitored and coached to the extent needed.

In the three LRPC congregations a significant portion of that coaching focused on discovering when things had broken down, how that had happened, and how to repair the breakdown and move forward in positive ways from there. All nine congregations had times when the process broke down and work ceased occurring (and for some of them, it broke down completely and permanently). What we saw across the four congregations that did not have a dedicated consultant was that when things were not going well, there was a tendency to simply work on other things, or, as will be discussed below, to cease engaging in long-range planning altogether. When these congregations began to flounder in the planning process, their leaders did not realize the importance of seeking help and reinvigorating the long-range planning process, and perhaps did not know where to go to obtain that help. This is an important contrast between the four most successful congregations and the other congregations. The successful congregations obtained expert help to overcome breakdowns and proceeded on from there, while the unsuccessful congregations either did not use consultants at all or at least did not do so for that purpose.

Observing these long-range planning processes demonstrated that teamwork and a shared sense of vision and responsibility do not typically exist in synagogues. Vision-based leadership and teamwork are learned skills that congregations need to teach. This learning then needs to be concretized through policy, procedure and structure. For example, one congregation was guided to replace a nominations committee with a leadership development committee that has nominations as one of its tasks. Another launched a leadership development program. A third has made leadership training a regular part of its board agenda. Across the LRPC congregations, there was movement toward having ongoing long-range planning committees, which indicates recognition of the need for attention to implementation, fresh data collection, and revisions to plans over the course of their implementation.

Observing the work of the LRPC groups demonstrated that one of the major functions of effective congregational planning is to facilitate significant leadership development. One aspect of leadership development is helping people understand the role of vision in leadership and the complex interaction among leadership, governance and administration. Another aspect of leadership development involves learning to function in a team. Because synagogue leaders do not typically think of their work in terms of teams, the planning process became in part an exercise in training them in teamwork. A third aspect of leadership development involves enriching the leader's knowledge of concepts and skills. Effective leaders have a substantial practical and conceptual tool bag, so grasping the basics of such tools as setting measurable objectives, doing evaluation, designing for transparency and applying the basic principles of market research greatly enhances the effectiveness of congregational leaders. Therefore, helping them to understand these tools and their implications for program design proved crucial. Fourth, planning involves reflection. It provides lay leaders and professionals an opportunity to step back together and examine the effectiveness of their interactions and of the congregation's modes of governance. In recognizing issues and negotiating solutions, they realize what they need to learn from each other in order to close those gaps and how they need to communicate with each other, which is critically important for leadership development.

In the course of their planning processes, all three LRPC groups saw the need to explicitly address issues of volunteer recruitment and leadership development and training, and all three ultimately understood the need for ongoing leadership development programs as a part of their mode of operations and committed to the development and/or strengthening of those programs. For example, one congregation has created manuals for board members and committee chairs, and established skills-oriented training programs for committee chairs, officers and incoming board members. Others have developed recommendations that focus on volunteerism, such as developing processes for identifying volunteers and tracking volunteer careers, increasing training and buy-in for volunteers, and keeping records on volunteers' activities. Because of the participation of their future presidents, each of these congregations has an incoming president who has a clear sense of what needs to be accomplished, which provides the presidents with greater focus and eases their transition at a time of considerable change in programming and organizational design. Together these activities provide both leadership development and team building, which focuses on helping all the major players become aligned regarding congregational needs and how they can best be met, increasing the likelihood of success. It is our sense that the consulting around long-range planning by itself would not have had as much of a long-term impact as it will have because of extra hours of instruction that focused on these key issues. That attention to these issues helped to deepen and reinforce key parts of the overall process and accelerate organizational change.

One conclusion we have reached by examining the experiences of long-range planning participants across the five synagogues that engaged in intensive consultation is that there is a world of difference regarding the depth of thinking about issues facing institutions between a consultant who has an understanding of synagogue and broader Jewish cultural realities and one who does not. It is important for a consultant to understand that it is not the consultant's job to change the fundamental way that rabbis function in these congregations, and the consultant should not be trying to change the congregation's Jewish theology or ideology. Those are givens in trying to bring organizational change to congregations. Organizational change requires a solid process that leaves participants with both conceptual and practical tools that are particular to synagogue functioning. Examples of skilled applications to the synagogue setting included using a functional approach to liturgy to examine the congregation's Shabbat morning service and using marketing methods to analyze attendance problems of a weekday *minyan*.

These kinds of tools of analysis proved useful during long-range planning and are intended to be significant tools that can be internalized to drive further change over time. We have learned that the only way that synagogue consulting of this kind can be effective is if the consultant has analytical tools, a broad understanding of synagogue functioning, and a working knowledge of current changes in Jewish culture and Jewish life, including shifting demographics. Effective long-range planning consultation in synagogues is built upon a wisdom of practice and a knowledge base embedded both within and outside of the Jewish world and the realm of synagogues. Both kinds of knowledge and experience – including secular organizational development and synagogue organizational development – are crucial to the success of long-range planning consulting to congregations.

## ***Finding Seven: The Impact of Seminars and Networking on Long-Range Planning Processes and Outcomes***

This finding reflects research only on the LRPC congregations, but we believe that the LRPC model has much to recommend to the broader field of congregational consulting and thus have included it here. The LRPC provided eight monthly joint seminars for its three congregations. These were attended by a delegation of volunteers and staff appropriate for each respective topic. Seminars were designed to support the learning and outcomes of the planning process. They included topics such as endowment and capital fundraising, team-building, mentoring and supervision, segmented marketing as a tool for constituency building, strategic thinking about the worship experience, and shifting congregants' roles from consuming to citizenship. These seminars were led by specialized consultants and aimed at providing the tools to support professional and lay leadership development, organizational learning and cultural change within each congregation.

The three participating congregations reported that these seminars, because they were provided in careful sequence with their long-range planning processes, provided substantive learning and necessary information and perspectives that enabled them to better understand their ongoing long-range planning processes. Participants stated that without these concrete and focused seminars, they would not have been able to understand and integrate the importance of each of these areas into their long-range planning. Because they were immersed in the ongoing work of long-range planning, these seminars were measured against their ongoing experiential learning. In this way, participants' questions and insights were custom-tailored to where they were in their planning processes and were therefore germane and translatable to their local contexts. These seminars also stressed the critical importance of team building to the internalization of organizational innovation.

Furthermore, because the three congregations attended these seminars together, they were able to benefit from hearing each others' issues, questions and experiences in ways that helped them appreciate shared struggles and successes as well as what was unique about their individual contexts and processes. These seminars also provided networking opportunities that participants reported bolstered their efforts because they gained from exchanges and a "healthy competition" to complete excellent plans in a timely manner. These seminars allowed for the congregations to work from a cohort model. The peer support proved enormously helpful to their morale and to the overall efficiency of their processes as well, since they learned to turn to each other for strategies, resources, materials and questions. This kind of networking during such an intensive long-range planning process also proved useful in terms of obtaining process and procedural suggestions from each other. And what made this networking particularly helpful despite huge differences across congregations (in size, structure and ideology) is that they were engaged in parallel processes so that they could look at each others' methods and outputs and borrow each others' instruments (such as letters, focus-group questions and program grids) in ways that saved a significant amount of time because of the unusual access and accountability for quality provided by the consultant.

There was a vital and dynamic interaction between these seminars and the overall interventions. This provided for substantive reinforcement and refinement of each stage of the planning process.

In this way, the congregations themselves became their own case studies rather than relying on more traditional modes of seminars which often use case studies in ways that lack sufficient contextualization and therefore are less useful for organizational change (Schein, 1992). These seminars served to reinforce the learning that was occurring as part of the congregations' on-site organizational change and in so doing provided an important opportunity for participants to internalize and operationalize concepts and methods, moving them from distant concept to intuition.

### ***Finding Eight: The Impact of Synaplex on Long-Range Planning***

This finding pertains only to the six congregations that participated in Synaplex prior to their involvement in a long-range planning process. Again, because we believe that this data has much to recommend to the field, we have included it here. Rabbi Hayim Herring, Executive Director of STAR (Synagogues: Transformation and Renewal), has defined Synaplex in this way:

Synaplex is a Shabbat-centered, synagogue-based initiative that uses the synagogue to help strengthen and build community. It enables contemporary Jewish individuals and families to celebrate Jewish life through a menu of innovative options in the realms of prayer, study and social and cultural programs during Shabbat in the synagogue.... Synaplex speaks to the values and strengths of synagogue professionals and lay leaders. Synaplex is inspired by the classical functions of the synagogue: Beit Knesset, a house of meeting; Beit Midrash, a house of study; and Beit Tefilah, a house of prayer. Synaplex revitalizes that tradition for the 21<sup>st</sup> century by emphasizing all of these meanings concurrently. (Herring, 2004, p. 4)

Synaplex, with its focus on increasing meaningful participation in Shabbat programs and in the synagogue community more broadly, highly values meaningful programming and outreach, volunteer engagement, marketing, evaluation, and innovative communication pathways (Synaplex Evaluation Findings: Executive Summary, 2006).

As stated earlier, six of the congregations in this study were purposely selected because they had participated in Synaplex for at least two years prior to embarking on their long-range planning processes. What we found is that by themselves, these congregations showed only a minimal capacity to move beyond their particular programs and their focus on Shabbat, the hallmarks of Synaplex, into deep organizational change through unassisted long-range planning. However, what Synaplex did accomplish was bringing them much closer to readiness for long-range planning (as discussed in Finding Two, above). These congregations seemed to share a particular quality of greater openness and an ability to think about issues of planning in connection with marketing and team building. They were more explicitly objective-oriented in thinking about coordinated, innovative programming, having a greater awareness that to be effective, synagogues must understand what their programs are intended to accomplish. Synaplex congregations also already had a commitment to change. For many, though not all of the participants, their engagement in Synaplex raised their awareness of the issues facing their congregations and the need to actively address those issues for the wellbeing of the congregation as a whole and for accomplishing the congregation's purpose.

Our research indicates that Synaplex itself is no guarantee of long-term or deep organizational change within the relatively short two-year time frame of this study, but that it provides immediate change in (at least) three ways: (1) an increased interest in Shabbat programming and a shift toward innovative Shabbat programming and ultimately other synagogue programming; (2) more focused and objective-driven program planning and coordination; and (3) an increased attention to team building and collaboration across programs, job descriptions and efforts at marketing and outreach. Despite these important changes, the lessons learned from Synaplex were not necessarily translated to other parts of synagogue functioning or extended to anything beyond Synaplex programming, though that might well occur over a longer period of time than the one in this study. Synaplex leaders did not usually generalize the lessons learned to other areas of congregational life. This in part speaks to the decentralized way that programming happens in synagogues and to the fact that most synagogues do not have a built-in venue for self-reflection and leader learning. Even great program successes do not often result in learning that is carried from one program to another or across constituencies and structures. However, we found that when planning committee members were provided with structured opportunities to reflect on the role and impact of Synaplex on their synagogues and on lessons that could be brought from Synaplex into a long-range planning process, many (though not all) of them stated that they realized how generative their Synaplex involvement had been in readying them for more focused change and innovation and in setting the stage for easier and more effective communication across constituencies. Below are statements by some of the participants who were involved in Synaplex:

- A congregational president stated, “This is a particularly opportune moment for [name] to take advantage of the consultation and technical assistance offered through [LRPC]. In part due to our participation in Synaplex, the congregation has grown considerably, and our programming has expanded. This has provided us with the opportunity and challenge of planning how to continue to grow, to maintain our sense of community, our innovative family education and adult education programs and our commitment to *Tikkun Olam* [improving the world/social justice], and to find a governance, financial and rabbinic model that will enable us to sustain both our growth and our shared goals and values.”
- Another congregational president remarked, “The Synaplex structure has helped the committee chairs start to work together, instead of everyone just doing their own thing, but this is still a work in progress...It did help us identify target groups within the congregation that we were not serving, such as families with small children, and it has helped the committees start to work together. We will also have to look at the goals that we are in the process of articulating and see how Synaplex can help us meet those goals.”
- A long-range planning co-chair commented, “Our experience with Synaplex seems to have made a significant impact in the long-range planning process in terms of the variety and dynamism of the programming that we offer. It also has helped clarify our sense of the role that our synagogue has in the Jewish life of greater [city name], and how that role may change over time.”

- When asked if he saw an impact from Synaplex, one long-range planning committee member said, “The goals we have for the LRP project include: outreach and marketing, finding other points of entry [to involvement], which is Synaplex, and then finding ways of reaching out to under-affiliateds, so that is clearly related to Synaplex.. We will take what we did and learned with Synaplex and build on it.”
- When asked if the congregation’s prior involvement in Synaplex impacted the LRP process, the rabbi wrote, “Yes. It conditioned our community to be cognizant of the value of evaluation, planning, innovation and change management. Thus it paved the way for a comprehensive LRP.”
- Another rabbi stated, “Synaplex helped us to see the mythology and culture of the place. Synaplex was taking stuff implicit in our work and taking it to the next level and moving the congregation past some of its stuck places. So to some extent our openness to outside people like Synaplex has led to our openness to this long-range plan.”
- An executive director wrote, “Our experience with Synaplex has certainly brought to light the needs for appropriate staffing, the desirability of working collaboratively and coordinating programs, of marketing together, and also of the limitations of our building. All of these issues and successes are encompassed in our goals for the long-range planning process. We are acutely aware of the strengths and challenges of being a diverse and complex community with multiple gateways. Creating a programming/thematic vision for the synagogue that recognizes us as such has also been affected by our participation in the Synaplex initiative.”
- A synagogue president commented that the “...biggest thing [about Synaplex] was that it made the congregation open up to thinking about different things, new proposals. We were in the same mold; it gets us out of the traditional mindset, so it was a great eye-opener for the congregation, and can appeal to broader community, so in that way [the LRP] is an extension of Synaplex.... Synaplex helped us to become more open to change and trying to be inclusive, for the whole congregation to be involved in what’s going on.”
- A long-range planning committee co-chair said that “The Synaplex process generated growth for our synagogue and a lot more programming. So it brought in energy and helped to bring us to this point. It was a major source of growth in membership and programming, and in a good way it has created some of our current challenges. We were conscious to plan things we could sustain after the funding went away.... So now the LRP can support that growth and help us integrate the program development as a result of Synaplex into the life of the congregation.”
- A long-range planning participant stated that “Synaplex has caused a push to involve laity—for laypeople to have greater buy in and participation. Synaplex facilitated a shift. Now the congregation saw a different model of involvement, seeing their synagogue and synagogue involvement anew, that is Synaplex.... It really has helped

the congregation as a whole, not just in the committee meetings, but in working on that model of committees.”

These statements speak powerfully to the importance of Synaplex in terms of congregational functioning, self-awareness and a desire for change. They provide significant insight into the role that Synaplex can play when participants are given ample opportunity to reflect on its impact and contribute to the life of their synagogue.

### ***Finding Nine: The Importance of Incentives***

One of the realities of long-range planning that this study illustrates is how easy it is for planning processes to break down and for the effort to fall apart. The fact that the three LRPC congregations were required to pay \$5,000 at the outset of the process and that this was returned only upon the successful completion of the program created a clear sense of accountability and motivation. As one of the LRPC participants stated, “There is a value to the fact that, because of the grant, we have a timeline. In order to get the money back, we have to deliver a strategic plan and have it ratified. That is both incredibly helpful and an incentive.... It has condensed the process because it needs to fit into pre-existing parameters.... We are doing eighteen months of work in ten months, which is a tension but also gives us momentum.” While the pace of the LRPC seemed at times daunting and overwhelming to participants, the financial incentive, along with the structured cohort model, helped congregations adhere to the timeline and process in productive ways. Thus, we recommend further consideration of a model of intensive consulting that has some kind of incentive-based framework. This might take the form of consultants structuring their contracts so that when plans are completed according to contractual benchmarks, consultant fees are lower.

### **Recommendations Regarding Synagogue Consulting**

Based on the findings of our research, we offer twelve recommendations for the field of synagogue consulting. We see this as a significant opportunity for growth in the field and view this report as an opening for further research, reflection and dialogue.

1. To ensure successful synagogue long-range planning processes, it is important to select a consultant who will be involved in the entire process from the time a decision is made to produce a plan at least until its final ratification. For consultants to be fully helpful, they must have all the competencies needed that are not resident in the congregation’s leaders. Since many congregations do not have the sophistication to determine the skills and knowledge needed or to evaluate the suitability of the consultants from whom they select, it would be useful for congregations to have access to materials that help them assess the nature of their consulting needs, the skills of the consultants being considered, and the degree of fit between consultant and congregation. These should be developed in a way that allows all American synagogues to use them successfully.

2. Effective long-range planning is an intensive process. It takes significant thought from the congregation's senior leaders over a considerable length of time. An eighteen-month or two-year process is not unusual. Because the process will involve consulting, a retreat and other expenses, it needs to be sufficiently funded. The many meetings and considerable research involved require substantial volunteer commitment. The process also requires heavy use of staff time both for participating in deliberations and for the extensive administrative work that planning entails. Congregations need to be realistic about the extensive investment that good planning requires and about how powerful the results can be.

3. Congregations whose leaders are considering embarking on a long-range planning process often make such critical errors at the beginning of the process that the planning process never recovers. The scope of the planning to be undertaken, the structure of the committee that will oversee it, the timeline for the process and the role of the congregation's professionals all deserve careful consideration. Who will provide the administration, facilitation, and writing/editing for the planning process—three very time-consuming and intensive roles? What kind of financial support will the process have? How will the congregation's committees and its members and staff have input to the process? Who will manage the complex interactions between staff and volunteers required by a thorough planning process? How will reporting be done? How will support for the plan be built? Who will ultimately ratify the plan? All these questions need to have answers that represent a consensus before the formal planning process can begin. This will require many careful conversations at the very outset so that it becomes clear who will be involved, in what ways, and for what period of time.

4. Congregational leaders need to define the scope of the questions that they want the planning process to address. This scope must be conveyed in the charge to the planning committee. The design of the planning process should grow directly out of the nature of those questions. The research techniques employed and the communications anticipated should also reflect that scope. Management of the process should reflect awareness at every stage of the desired outcomes of the planning process. Consequences of not attending to sharply defining the scope of planning include wasted time and effort, difficulties in finishing the process in a timely fashion, and an absence of the enthusiasm and energy needed for implementation.

5. The process of planning, when it is done well, deeply affects the level of insight and commitment to change not only of those most directly involved in the planning process but through input, reporting and informal conversation, all key volunteers and staff members. Furthermore, the process should create the commitment to the plan and enthusiasm about it that are needed for implementation. Even before formal ratification, many of the ideas, insights, program ideas and process suggestions that planning generates can be implemented through the regular committee structure of the congregation. This use of the process's "low-hanging fruit" not only increases the worth of planning; it also paves the way for future implementation. When this process is not occurring, it bodes poorly for the ratification of the plan, and for its implementation after it is ratified. Potentially disruptive personnel discussions must be kept confidential. However, the hoarding of information generated by research efforts, secretive deliberations, and efforts to avoid releasing any conclusions until all parts of the plan are completed are all counter-productive in efforts to create change.

6. Fresh thinking about the unfolding nature of the challenges facing congregations and the best practices that respond to those challenges is critical to effective planning. Use of new thinking about marketing, fund development and volunteer organization and training, for example, had a major influence on the successful planning processes in this study. The fresh thinking and best practices can be accessed for the congregation through networking within the movement with which it is affiliated as well as to those familiar with the best solutions from across the denominations. Some of this information can also come from planning consultants. Sending representatives to presentations by experts can also provide important access. Without networking, consultant input, and access to the thinking of outside experts, congregational planners will not think deeply enough about either the challenges they face or their best responses to them. Thus planning ought to involve careful analysis of the state of the congregation, its members and all those whom it could potentially serve. It ought to also bring fresh thinking and solutions into the congregation from outside.

7. The planning of the congregation will be no stronger than the learning of those involved in the planning process. Regular reporting and discussion of research results and their implications should occur first at the planning committee level, and from there it should be continually brought to the board, senior staff and relevant committees. Examining new information, considering its implications, and considering how to respond can often lead to a greater readiness for cultural change. These discussions should grow out of gathering information already available in various places within the congregation, from focus-group research, investigation of best practices, analysis of demographic data, SWOT (strengths, weaknesses, opportunities, threats) analysis, consultation with staff and other committees, and efforts to clarify the congregation's mission, vision and values. Such planning committee discussions should lead immediately to writing relevant parts of the planning document so that the plan is developed over considerable time, and its pieces read and discussed gradually.

8. Congregations differ enormously in their histories, cultures, resources, missions and the challenges they face. Their structures, decision-making modes, objectives and programs will naturally reflect these differences. Plans cannot be one-size-fits-all if they are to be effective. A plan ought to reflect the congregation's specific context, issues and resources at the time the plan is completed and anticipate the changes likely to occur over the course of the plan's implementation.

9. Very few congregations have enough volunteers who are sufficiently trained for their leadership roles in the congregation. As congregations become more sophisticated in their programming, marketing and quality control, the volunteers who shape the congregation's direction, make financial decisions and provide oversight need much better training to perform these tasks effectively. This congregational responsibility requires ample resources for volunteer recruitment and leadership development, which can include orientation, training, mentoring and evaluation, and must include systematic recordkeeping. Such volunteer recruitment and leadership development programs are not only important for the congregation's future broadly, but they are of critical importance for the effectiveness of the organization's planning process from inception through implementation.

10. Very few congregational professionals have the expertise required for leadership training or for sophisticated planning processes. To increase congregational effectiveness, congregations need to budget annually to bring in trainers and consultants who can help design these functions and deliver the training needed. Since a full long-range plan is generally needed only every five to seven years but requires considerably more consulting resources when it is underway, congregations will find it helpful to budget more than they need for consultants annually, accruing funds that ensure that they can afford planning consultants as needed.

11. Synaplex congregations, when they undertook the kind of integrated planning prescribed by the Synaplex program, showed a greater readiness for planning for several reasons:

- They were accustomed to the partnership of volunteer leaders and staff that planning requires.
- They had developed ways to consider how to innovate successfully.
- They were used to evaluating programs using measurable objectives.

However, the presence of all three of these readiness measures did not guarantee good planning, which depends much more heavily on the design of the planning process, the effectiveness of the consultants involved and the availability of all the resources needed for planning. Nevertheless Synaplex does help the congregations take a valuable step toward the broad and deep organizational change that most synagogues need.

12. Given the critical role that consultants play, it is urgent that the measures needed to improve the field of synagogue consultation (see the recommendations in Newberg, Ravitch & Teutsch, *Consulting in American Synagogues: A Report on the State of the Field*, STAR, Fall 2007) be undertaken. These include the creation of an association of synagogue consultants; the development of professional standards for consultants' knowledge, training and conduct; and a certification program and in-service training by that association. An accessible list of consultants, their specialties and locations like the one now on the STAR website that was launched by the LRPC effort should be regularly updated and expanded.

## **Recommendations for the Field of Synagogue Studies**

In terms of future research, we suggest that longitudinal studies of congregations be done that continue after the congregations complete their long-range plans. Such studies should focus on what happens during and after the implementation stage in terms of the success of implementation, the impact of the plan, the changes resulting from ongoing organizational learning, and shifts in structure and in leadership development processes. The studies should explore what long-term congregational experiences can teach us about the impacts of intensive consulting on congregational learning and change. We also suggest a study of congregations that do not complete their long-range planning processes in order to help understand what can further support them in their organizational development.

We also suggest a study that follows the strategic-planning interventions of several consultants with different backgrounds and training from the contracting stage through implementation so that a greater understanding of the impact of different kinds of training and knowledge on the part of consultants can be developed.

No systematic work has yet been undertaken to study the effectiveness of other forms of congregational consulting. Studies of the effectiveness of different kinds of financial development and fundraising consultants, of interventions in the case of boundary violations, of executive coaching for rabbis, and of trainers of synagogue leaders are all needed.

The field of synagogue studies itself is in its infancy. The development of this field of research, which can draw on various social-science disciplines as well as the field of Christian congregational studies, would be aided by an effort to convene researchers in the field for conferences so that they have a place to present research, receive feedback and develop collegial relationships. Having a central place to publish their work would help scholars in this emerging field make their work more accessible not only to each other, but to consultants and to rabbis and lay leaders across the spectrum of Jewish life.

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2. What are some of your congregation's strengths? Please cite specific examples.

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3. What are some of your congregation's weaknesses? Please cite specific examples.

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4. How would you improve upon the following:

a. Board effectiveness (e.g., Board members' understandings of their roles as policymakers; Does the Board support the institution financially?)

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b. Ability to program effectively for your various constituencies?

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c. Outreach to current members?

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d. Outreach to prospective members?

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e. Financial situation (e.g., balanced budget, fundraising, long-term outlook, outstanding liabilities)?

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f. Communication between clergy and staff?

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g. Communication between clergy and the Board?

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## NOTES

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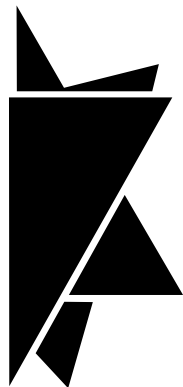
## NOTES

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