

**PEARL: Providing Education and Resources for Leadership**

# **Embarking on Strategic Planning for Smaller Congregations: Mission, Vision, and Values**

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**Jewish Reconstructionist Federation**

***Transformative Judaism for the 21st Century***

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## Congregational Readiness for Visioning and Planning

Robert Leventhal

Adapted from *Stepping Forward: Synagogue Visioning and Planning*, © 2008 by the Alban Institute.

<http://www.alban.org/conversation.aspx?id=5688>

Before I agree to work with a planning team, I determine if the leadership is ready for the test. Congregations are different. Some are doing great and don't need to do developmental planning now. Others lack a readiness to plan. I have developed some characteristics of successful planning teams for leaders to consider. If a congregation does not have enough of these assets, they may need to set more modest goals. They may not be a candidate for serious planning. Even if they feel they are ready, many still struggle with key issues related to readiness. Look for signs of readiness for planning. Have a mental checklist: Do we have board approval? Is the clergy on board? Do we have planning chairs? Do we have a budget?

There are three key elements to sustain change: honest assessment of the present, hopeful vision of the future, and practical steps to move forward. Although you may find that everything appears ready on the surface, one of the challenges is to try to understand the deeper readiness of the culture for change. All congregations have informal norms that they don't articulate. There are also deep, unconscious (tacit) norms that they may not be aware of. The planning team must be humble about the ability of new plans to overcome the underlying DNA of the congregation. Planners need to check readiness but to expect surprises.

Let's look at some of the factors to consider.

### **1. Clergy Must Be Supportive, Enthusiastic, and Committed to Planning**

While the administration and lay leadership play key roles, if the clergy is not committed, it will be hard to sustain change. Programmatic initiatives that require professional staff to follow up may lose focus. Key members of the leadership supporting change may go unsupported or even be actively resisted. When the rabbi or pastor is not ready, it does not make sense to embark on visioning and planning.

### **2. There Must Be Urgency for Change**

Some congregations are performing quite well. They may be in a great location with wonderful demographics for new members. They may have experienced and effective professional and lay leadership. The congregation has direction and is working effectively. These congregations may feel that their current governance and the leadership and management tools they have are quite adequate. They do not feel the need to mobilize co-planners or take the time to do visioning and planning. They may simply want a small long-range planning committee to upgrade financial plans.

### **3. Key Lay Leaders Must Be Committed to Planning**

There is seldom well-defined readiness for leadership development programs. Even when I get a contract to work with a congregation on visioning and planning, the leaders usually have an incomplete agreement. Some do not endorse the plan. Others actively oppose the process. Still others are passive-aggressive. They will listen attentively but not agree to work on implementation. I try to review the plan with the core leadership and then ask for a meeting with the board. The entire leadership community needs to work through the issues. This models the kind of consensus-building skills needed in the process later.

### **4. There Needs to Be a Financial Commitment to Planning**

Planning requires resources. Even if a congregation self-guides their process, they will need to budget for meals, the preparation of materials, etc. This requires a planning budget. The process of getting some money in the next year's budget for planning will bring all of the other readiness issues into better focus. When the board has to vote on spending the money, they will dig deeper to explore their readiness.

### **5. Planning Should Not Be Directly Competing with Other Major Projects**

During visioning and planning, congregations need to be focused. They cannot be distracted by another major congregation-wide project. If they are in the midst of doing a capital campaign or at the start of a building campaign, they may not be ready. Their focus needs to be on the other task. There is seldom enough energy to do both tasks. In this kind of situation, I would suggest a short-term leadership development training rather than a whole congregational visioning plan.

### **6. Planning Requires Some Capacity for Creativity**

Some congregations have little capacity for creative vision exercises. They are so resistant to change that they won't allow creative stakeholders room to brainstorm. They tend to interrupt brainstorming verbally or nonverbally. They discourage creative thinking in group sessions. Older established leaders remind new leaders that their ideas "have been tried before." They provide background information on why the culture won't respond to a proposed idea. I put a premium on creativity and collaborative learning to help overcome the reluctance of some stakeholders.

### **7. Planning Requires a Tolerance for Feedback**

Some congregations are not used to getting feedback. They don't have much of a history of trust. It follows that these groups are often reluctant to empower new individuals or groups. Empowered groups will provide the leadership with the

opportunity for new energy and creativity (as I noted above), but they will also ask questions, raise concerns, and provide some challenging feedback.

## **8. Planners Need Conflict Management Skills**

Potential visioning and planning congregations should not be in the midst of a high-level conflict. It is too difficult to recruit participants when people are in warring camps. Visioning and planning requires a lot of energy. You have to sell others on the value of the planning and its value to the congregation. Planning is somewhat abstract. Congregations need to trust the assumptions and processes. In a culture where relationships are strained and conflicts are raging, it is hard to get people to trust you. If you have a major conflict, it is important to delay visioning and planning and work to acknowledge the conflicts and mediate the concerns of the various parties. After six months it may be possible to start some parts of visioning and planning. At some point the community needs to begin to focus more on the future and less on the past. Visioning and planning can be a helpful bridge from the period of conflict to the period of promise, but visioning stirs the congregational pot. Congregations need sufficient health to manage what bubbles up.

### **Taking the Right Journey**

Some congregations are not ready to do planning. Most can gain from a board retreat that helps clarify values and goals. Many could build on this with a series of leadership development workshops. Most could gain insight into their position, their identity, and their challenges and opportunities by doing parlor meetings. Congregations need to reflect on their readiness and find the leadership-development tasks they have energy and capacity for.

## Clarifying Our Values

The first step in congregational strategic planning is for the congregation to clarify its values. Ultimately, the congregation's strategic planning process will rest upon these identified values. Congregations must ask themselves: "Who are we as a synagogue community?" "Are there Jewish values which our members feel are the most important to our community and which help to define us as a community?" In addition, shared values provide a critical guide for interactions and relationships between staff, peers, congregants, and all who interact with the community. They are the precepts on which the congregation operates.

It is important that as many members as possible express their views in a congregational values clarification process. A number of opportunities for congregants to gather should be offered, and a small committee should be put in place to phone those members who are unable to attend any of the sessions. It is important to have both broad participation and for all members to feel that they are part of the values clarification process from the beginning.

Clarifying one's community values is also the foundation for creating the mission statement, a tool which defines who you are as a synagogue community. A values clarification process which involves as many members as possible should be undertaken before a mission statement is written or re-examined by a smaller, representative group of community members.

## Sample Values Clarification Process

Based on an exercise by congregation Dorshei Tzedek, Newton, MA, Rabbi Toba Spitzer, 2000

Adapted from:

Kehillah Builders: Jewish Values-Based Approaches to Building Sacred Reconstructionist Community  
Available from the Reconstructionist Press – <http://jrf.org/pub/cat-congregations.html>

You will need a facilitator for the exercise and a recorder for the latter part of the exercise.

A. The leader introduced the group to two texts by Martin Buber on community and the need for something to be at the center of the community, holding the community together. (15 minutes)

The true community does not arise through people having feelings for one another (though indeed not without it), but through, first, their taking their stand in living mutual relation with a living Center, and, second, their being in living mutual relation with one another. The second has its source in the first, but is not given when the first alone is given. Living mutual relation includes feelings, but does not originate with them. The community is built up out of living mutual relation, but the builder is the living effective Center.

Martin Buber, *I and Thou*

The real essence of community is to be found in the fact – manifest and otherwise – that it has a center. The real beginning of a community is when its members have a common relation to the center overriding all other relations: the circle is described by the radii, not by the point along its circumference. And the originality the center cannot be discerned unless it is discerned as being transpicuous [transparent] to the light of something divine. All this is true; but the more earthly, the more creaturely, the more attached the center is, the truer and more transpicuous it will be.

Martin Buber, *Paths in Utopia*

B. Following a group discussion of these texts, a list of eighteen Jewish values were handed out and explained briefly. People were then divided into groups of 4-6 people and asked to discuss all of these values as they related to the community and then to choose the six values which they thought (as a group) were the most important for the congregation. They could also choose a value which they thought was missing from the list. Each group next jointly wrote one or two sentences which explain how the values they've chosen are reflected in the synagogue community. (60 minutes)

Possible values – *Limud Torah*: Jewish Learning  
*Tefillah*: Prayer/Spiritual Practice  
*Tzedek*: Justice

*Gemilut Hasadim*: Covenantal Caring  
*Kedushah*: Holiness  
*Hakhnasat Orkhim*: Welcoming / Inclusivity  
Diversity  
Democracy  
*Kehillah*: Commitment to Community  
*Mitzvah*: Ethical and Ritual Practice  
*B'tzelem Elohim*: "In God's Image"  
*Menukhah*: Rest and Renewal  
Treating All People with Dignity  
*L'dor V'dor*: Connecting the Generations  
*Hiddur Mitzvah*: Beauty  
*Simkhah*: Joy and Celebration  
*Bal Tashkhit*: Avoiding Waste  
*Rodef Shalom*: Pursuing Peace

C. Each group shares the six values they have chosen and the sentences they've written about these values with the larger group. Each group's values are written on a separate large sheet of paper which is hung in the room so that everyone can see the values listed on it. The facilitator leads a discussion about the values that are common to most of the groups. At this point, the group can determine if they want to settle on a set number of the shared values (they could decide on more or less than six). The group then decides on next steps, which could be to a process to create a Vision Statement based upon these communal values. The Board of Directors or some small contingency of it could be asked to draft a Vision Statement based upon the visioning work of the entire community (20 minutes).

## Envisioning Our Future

A congregation's vision of itself is not the same as its mission statement. A mission statement is a general statement of purpose at a particular time, whereas a congregation's vision focuses on the *future* aspirations of the synagogue. Many organizations come into being because of the vision of one or more founders who then work to make that vision a reality. Thus, vision is a necessary precondition for strategic planning, and it can be a bridge between the present and the future. Vision is the sense of destination shared by the people who care most about the synagogue's future, its members.

A shared vision should be a compelling portrait of the "promised land" (how the congregation sees itself at some distant time). It reflects an optimistic view of the synagogue community's future, and it is a source of inspiration which creates enthusiasm and excitement among members while providing clear decision-making criterion.

A congregational vision should seek to capture an ideal, unique and attractive image of the synagogue's future and should answer the question: "What kind of community do we want to create?" Vision is the ability to see the community's potential and is an expression of both direction and hope.

### Tzedek v'Shalom Vision Statement

<http://www.tzedekvshalom.org>

*Love and truth will meet, justice and peace will kiss...* Psalm 85

WE ARE A PROGRESSIVE JEWISH COMMUNITY, committed to realizing - Tzedek v'Shalom - justice and peace - in our lives and in the world. We seek to build a spiritual community based on love, compassion and mutual respect. We deepen our spiritual lives through prayer and meditation (tefilah), Jewish study (Torah and mitzvot) and action to heal the world (tikkun olam). Our faith and actions are based on three great Jewish principles:

*...In the image of God*

Genesis 1:27

*...Turn it, turn it, for everything is in it*

Pirkei Avot 5:25

*...Justice, justice shall you pursue*

Deuteronomy 16:20

WE SEEK GOD'S IMAGE in ourselves and in others, knowing that God has many faces. Our Judaism is a generous spiritual path, enriched by a diversity of belief, spiritual practice and human experience.

We challenge ourselves to see God's image in those whom we have been taught to fear, in those with whom we disagree and those who have been marginalized because of race, class, gender or sexual orientation.

WE EMBRACE TORAH as the foundation of our Jewish study. We seek to learn its many layers, from the plain meaning (pshat) to the most hidden truths (sod).

We will learn from modern interpretations as well as the ancient texts and commentaries. As part of our study, we will create our own commentaries, midrash, rituals and other sacred works, using the talents, energies and life experiences of our community.

FAITH CALLS US TO SEEK JUSTICE for all people. We are committed to act with other faith communities to challenge institutions and structures that have perpetuated injustice in our nation and throughout the world.

Love of Israel especially obligates us to support Israelis who are striving for peace and justice in Israel, for reconciliation between Israeli and Palestinian people and for peace between Israel and its neighbors.

LET US STRIVE TO FULFILL GOD'S COMMANDMENT TO BECOME A HOLY NATION... *Exodus 19:6*

## **B'nai Havurah Vision Statement**

<http://www.bnaihavurah.org>

- B'nai Havurah, a dynamic, participatory, Havurah-based Reconstructionist community, will provide a responsive and fulfilling pathway for living a meaningful, involved Jewish life.
- We will provide multiple gateways to this Jewish life, including learning, prayer, tikkun olam (social justice), celebration, and the arts. There will be both community-wide programs and havurah-centered activities. Our members will develop their own Jewish practice in the context of our community, the Reconstructionist movement, and the continuing evolution of Judaism.
- We will encourage life-long learning, providing an exciting and meaningful educational experience for all ages. We will be committed to providing complete and engaging Jewish education to our children so that they may grow up having been exposed to the full richness of their Jewish religion and culture.
- We will support diversity as we welcome and respect all Jews, as well as the non-Jewish partners of our members.
- We will help our members to connect with the greater Denver Jewish community, the Reconstructionist movement, Israel and the Jewish people. We will encourage all members to participate in tzedakah (good deeds) and volunteer projects.
- Our leadership will come from our members and our rabbi, supported by professional staff and sufficient resources. Our rabbi will be learned, committed to our values, and responsive to our needs. The rabbi will collaborate with, and support the development of, lay leadership to serve the needs of the community.
- We will maintain a building that reflects our values. It will be a welcoming gathering place for our community as well as a resource center for our havurot and for members of all ages. Our building will enable and enhance member participation in communal prayer, celebration, life cycle events, learning, and private study and reflection. It will provide a home for our Jewish artistic expressions.

## **Developing a Mission Statement**

### **I. What is a mission statement?**

A mission statement is a statement which defines your community's fundamental purpose for existence. It answers the questions: "Who are we?" "Whom do we serve?" "What makes us who we are?"

It is a clearly defined motivational statement which focuses on the goals towards which the congregation will work.

It should include:

- 1) Whom does the synagogue serve? (Some possibilities: your membership; the broader Jewish community in your locale; *k'lal Yisrael* (national, international); specific demographics such as interfaith families, GLBT families, singles, seniors; etc.)
- 2) What is foundational for your synagogue community? (Some possibilities: Judaism, Reconstructionism, Jewish peoplehood, diversity, commitment to *tikkun olam*, etc.)
- 3) How does the synagogue fulfill its mission? (Some possibilities: through worship services, life cycle events, life-long Jewish learning, community programming, social justice advocacy, etc.)

### **II. How do you create a mission statement?**

It is important that a mission statement be crafted by a group of people that represents the demographics of your entire community. A committee of no more than seven to nine people works best, and they should be drawn from as many constituency groups within your synagogue as possible so that this group is representative of the make-up of the community. Reminder: congregations should have undertaken a community-wide values clarification process before they begin to draft a mission statement.

The mission statement should be in place before a strategic planning process is undertaken, because as goals and objectives are formed they must be checked to see if they fall under the rubric of the congregation's mission. Your congregation's budget and programming should also reflect your synagogue's mission statement.

### **III. The 5-Step Process of Creating a Mission Statement**

Adapted from Rabbi Shawn Zevit, "The Challenge of Growth"

Step 1: Leadership and Drafting: Once you have created a Mission Statement Task Force, a chairperson must be identified. You should also identify the person who will

take input from the entire group and draft the mission statement; two people may be able to collaborate on this, but no more than two.

Step 2: Doing Your Homework: Read a wide selection of mission statements from other JRF communities before your first meeting.

It is also important for the members of the Task Force to take a look at all of the other documents of the congregation. For example, the synagogue's by-laws may provide insight into the synagogue's organizational mission.

Step 3: The Task Force Meeting: Use the results of the values clarification and visioning process or processes to inform the brainstorming session for your mission statement. You should now have clear direction from your entire community. Don't forget to include the review of your by-laws and other materials which represent the synagogue to yourselves or to the community (for instance, does your website present an accurate picture of your congregation?)

Step 4: Creating a Draft: Following a Task Force brainstorming session, the writer or pair of writers is ready to create a draft and send it out to committee members for review. The Task Force should meet again within a week to look at the draft together for comments and input. (Comments can also be circulated electronically prior to the next meeting). Ideally, the time frame for completion will be kept short so that you don't lose the momentum or important content which has emerged from the values clarification process.

Step 5: Evaluating the Draft: Task Force members should keep the following criteria in mind as they review the draft of the mission statement.

- a) Is your mission statement clear? Ask people who have not been involved in the Task Force to read it and tell you what it says.
- b) Is your mission feasible, motivational, and distinctive? Will your current members feel that it is a clear representation of the community's purpose?
- c) Is it a statement of accountability that is clearly articulated?
- d) What does it ask of members of your community?
- e) What values of Reconstructionism, traditional Judaism, and sacred or spiritual community does it articulate? Does it address critical on-going or emerging community needs and responses to which your community is committed?
- f) Does it provide a sense of direction now and for the foreseeable future? (Note: Mission statements should be reviewed every two to three years. They are focused on the community's purpose *at the present time.*)

## Kehilat HaNahar Mission Statement

<http://www.kehilathanahar.org>

Kehilat HaNahar, a participatory community, was created to provide Jews in the greater New Hope/Lambertville area with a permanent home where we can practice the principals of Judaism consistent with the Reconstructionist definition of Judaism as an evolving religious civilization. We are dedicated to building a multi-generational and diverse Jewish community that practice Judaism in a manner that is relevant to our lives. We are committed to educating young and old in Torah, our history, and culture, and to affirming the ideals of our tradition in worship and in deed.

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## Keddem Congregation Mission Statement

<http://www.keddem.org>

Keddem Congregation is a community-led, Reconstructionist Jewish congregation, passionately committed to infusing tradition with new meaning. Worship, study, community and governance at Keddem are based on the following principles.

Keddem is:

- **Inclusive:** Everyone who supports our goals is welcome at Keddem, regardless of background, family, lifestyle, or Jewish education. The congregation is committed to democratic process in making major decisions.
- **Egalitarian:** Reflecting the fact that God transcends gender, our liturgy and leadership roles are gender neutral.
- **Participatory:** Involvement builds a sense of community. All Keddem members are encouraged to participate in activities ranging from services and *tikkun olam* (social action) to governance and social programs.
- **Questioning:** Keddem promotes Torah based continuous learning through study of the historical evolution of Jewish community, writings, and practice. Members benefit from each other's knowledge and experiences, value diverse opinions and respect differing perspectives.
- **Reconstructionist:** Keddem seeks to reconstruct a contemporary form of Judaism by honoring Jewish traditions while adapting them to modern life. Keddem Congregation is affiliated with the Jewish Reconstructionist Federation.

## Planning for Change

Rabbi Shawn Zevit and Rabbi Yohanna Kinberg

Adapted from [A Sacred Trust: Leadership and Governance](http://63.115.67.94/cong/res-st-planning.html)  
<http://63.115.67.94/cong/res-st-planning.html>

Planning is one of the most important functions in synagogue life and yet it is one that is rarely addressed in a systematic way that promotes community building. Once we have understood and clarified our values, and created a mission statement that embodies those values, we then look to create a plan to fulfill that mission.

The planning process is the framework within which policies are formed, budget and fundraising goals are set, and staff needs are projected. Planning focuses on the kinds of programs and services the congregation will be called upon to provide in the future. It necessitates a change in perspective on the part of the community. A great deal of trust is required in order for the planning process to be successful.

Planning is vital to managing growth. Most synagogue communities want to grow in ways that do not compromise or sacrifice the reasons for coming together to form a Jewish community. Growth brings greater diversity, additional resources, and more participation into the community. On the other hand, growth necessitates change. It challenges intimacy. It strains preexisting capacities. Many Reconstructionist communities struggle with growth management. Planning is the most effective antidote in reducing the stress, fear and uncertainty when dealing with issues of growth.

The planning process will not take half a year. It is most likely a several year commitment. The planning process is not an insurance against crisis nor is it a guarantee. Planning for change means working with the variables in congregational life and anticipating future needs or goals.

Without an ongoing process of planning that is accepted and understood by the leadership, the synagogue tends to govern itself through "crisis management". Thus decisions and policies are made in a time crunch and are often spurred by "real life" crises. The community is not afforded the opportunity to take time to make decisions or to think of issues in the abstract instead of the personal. The planning process incorporates more than establishing a committee for its development.

Ideally the following steps should be discussed:

- A pre-planning stage
- Self-evaluation: a description of the current status of the synagogue and an evaluation of the status; stage of congregational growth (start-up, pastoral, program, large sizes)
- Development of the plan in a group or committee that represents age, class, gender, family structure, length of membership and other membership variables.
- Implementing the plan
- Ongoing review of the plan's effectiveness with measurable goals

*Planning should be vision driven, based on the mission of the community and supported by covenantal governing documents. In a participatory democratic culture-the community simultaneously shapes and reflects their values. Planning should have its foundation and take into consideration these dynamics.*

## **FURTHER RESOURCES**

### ***Sacred Trust Seminar Workbook***

A 950-page resource manual on:

- Perspectives on congregational leadership and governance from classical Jewish texts and Reconstructionist literature and articles.
- Theoretical framework and practical resources for developing effective systems of congregational governance.
- Samples of by-laws, mission statements, strategic plans, Board and Committee structures, meeting agendas, Board manuals, and Board orientation materials.



⇒ This can be purchased for \$54 plus shipping from the **Reconstructionist Press**. Please contact Hattie Dunbar, Reconstructionist Press Fulfillment, via e-mail to [hdunbar@jrf.org](mailto:hdunbar@jrf.org) or phone to 215-885-5601 x30.

### **Kehillah Builders: Outreach (and Inreach) Plan**

⇒ <http://63.115.67.94/cong/res-kb-outreach-plan.html>

### **FAQ's on Reconstructionist Approaches to Jewish Ideas and Practices**

⇒ <http://www.jrf.org/showres&rid=487>

### **Acting Strategically: A Manual for Synagogue Planning**

David A. Teutsch, with Sandra Rubenstein and Isabel De Koninck  
Synagogues: Transformation and Renewal (Fall 2007)

⇒ [http://www.starsynagogue.org/images/stories/lrp\\_manual\\_final.pdf](http://www.starsynagogue.org/images/stories/lrp_manual_final.pdf)

### **Stepping Forward: Synagogue Visioning and Planning**

Robert Leventhal  
The Alban Institute (Fall 2007)

⇒ <http://www.alban.org/bookdetails.aspx?id=3078>