



Sulam for Strategic Planners

Planning to Plan

Robert Leventhal – USCJ Transformation Specialist Team Leader

Moderator – Aimee Close, Transformation Specialist

Overview

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

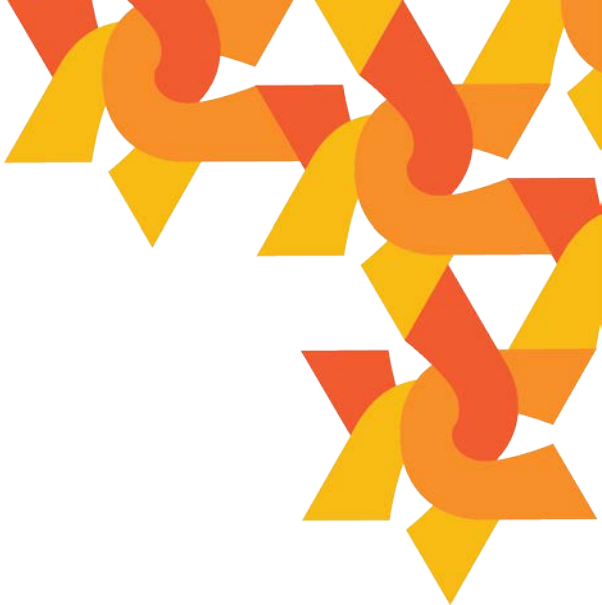


What?

- Sulam for Strategic Planners (SSP) is a program of USCJ to strengthen *kehillot* (Jewish congregations inside and outside the walls of the synagogue)
- SSP guides *kehilla* leaders through the process of creating a mission and vision for the future, assessing the wants and needs of their community, and developing strategies that best utilize their capacities



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



Who?

- Planning Steering Committee (SC)
- Planning Chairs
- Board, Staff
- Participants
- Congregation
- USCJ Transformation Specialists



Helps planners make connections- gives them a nudge

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

Rabbi Rachel Ain, Sutton Place Synagogue



Increases participation and engagement –all task force meeting



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

-Helena Ross, SSP Planning Chair, Town and Village Synagogue

Supports the skilled volunteer facilitator

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

Marla Cooper, Beth Shalom, Wilmington, Delaware



Sulam for Strategic Planners

You Will Not Be Alone

The role of Transformation Specialists

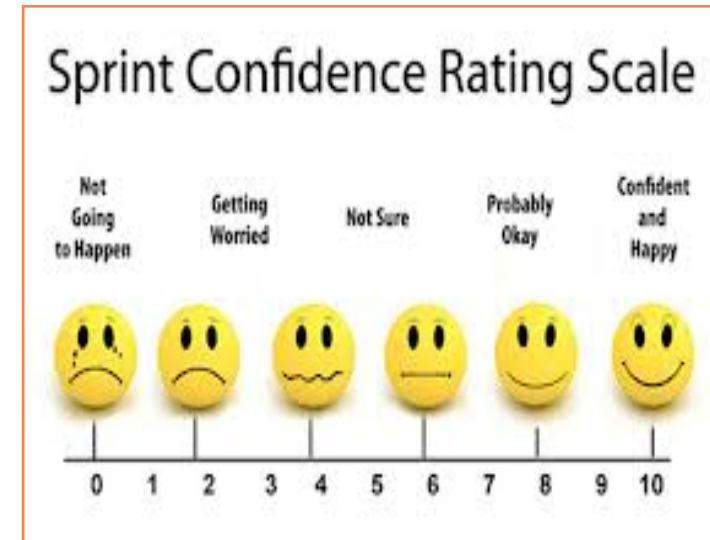
Transformation Specialists Will..

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

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

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

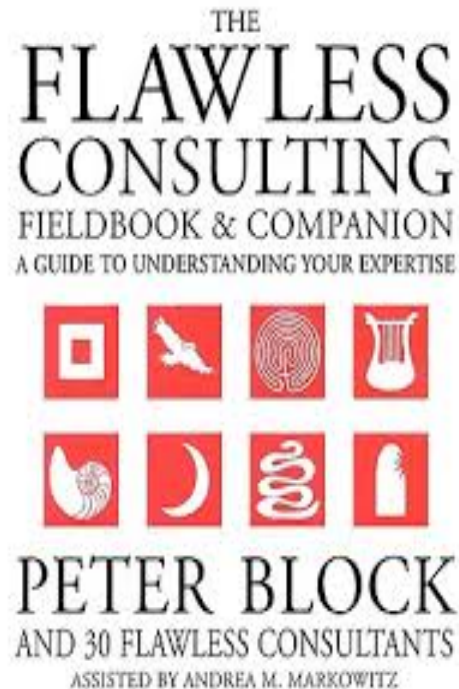
Guide You from A-Z! – Ensure that you are prepared from SC Start Up to Final Report and Implementation Plan.



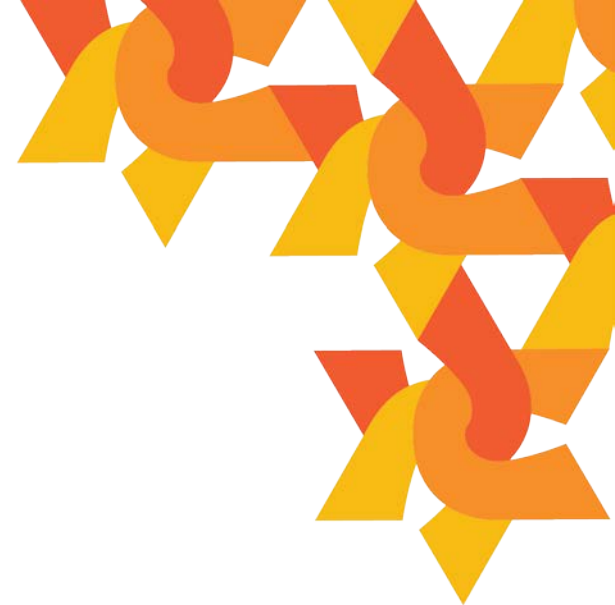
Feel Confident and Happy!

Transformation Specialists Will Not...

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



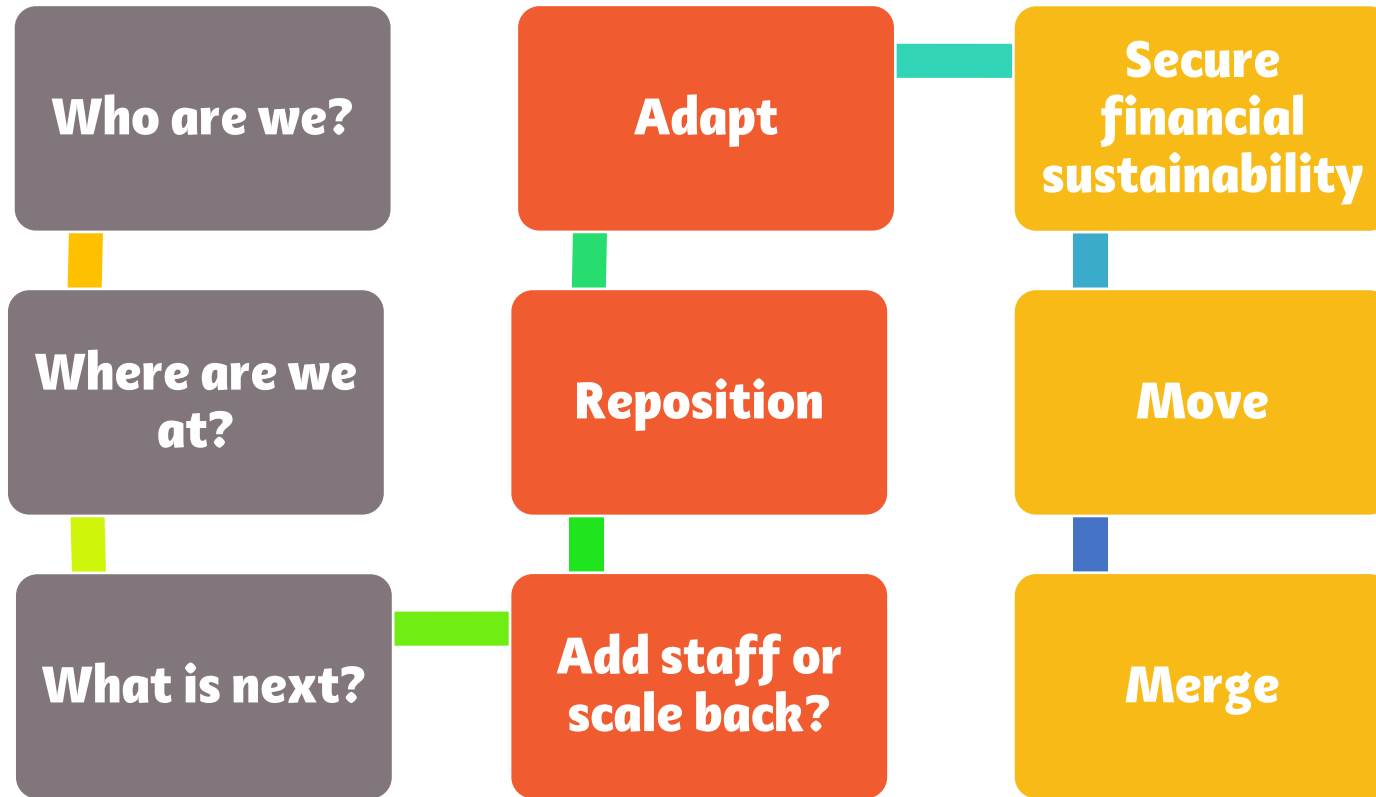
“Don’t own client issues”
-Peter Block-



What is Strategic Planning?

SSP STRATEGIES

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



Strategic Planning

“Stirs the pot”

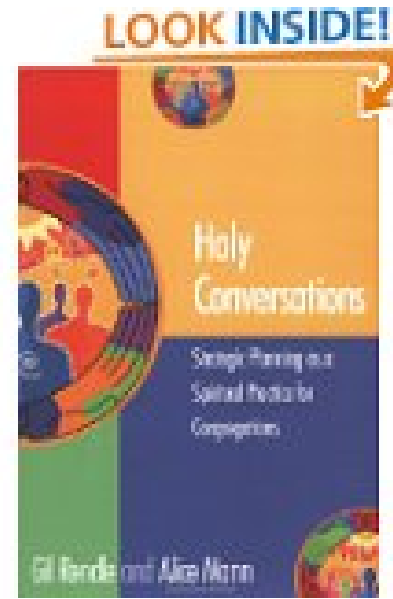
- Looks to future (3-5 years) beyond day to day problem solving (35 days)
- **Stirs the pot.** Planning leaders can make synagogue managers uncomfortable
- **Seeds ideas** that are often only realized years later



Congregational Strategic Conversations

SSP Planning Assumptions

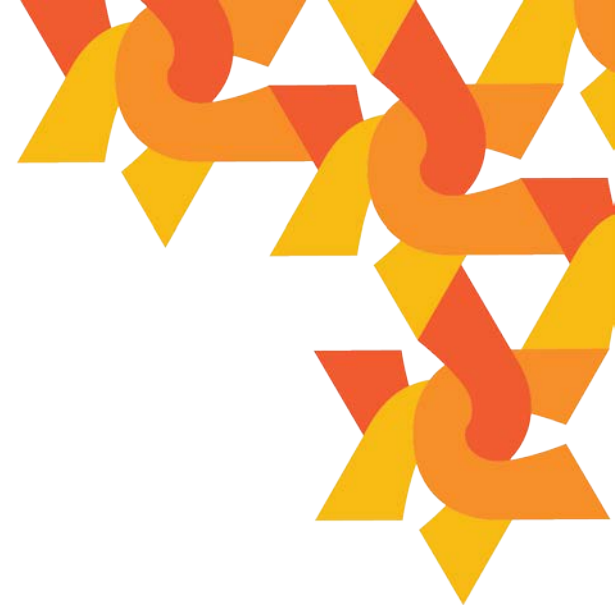
- Change happens through conversation
- The SSP planning process provides structure for conversation
- Planning is about making critical decisions
- Congregations have limited attention and capacity
- Need to find an appropriate fit for your congregation



Holy Conversations
Alban wisdom on the planning process in congregations
(Gil Rendle, Alice Mann-Alban, Herndon, VA. 2003)

Start with pages 1-70. Get an overview of Alban ideas about planning. Hear another voice.

Sulam for Strategic Planners



SSP Strategies

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

****See my blog on
*Getting Down to the
Business of
Teambuilding @
ByachadLeadership
@blogspot***

SSP Campaign of Change

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

Getting Started

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

Decide What to Do

- Develop **Vision** of Change - SCL helps you build a road map



SSP Campaign of Change

Make it Happen

- **Communicate** - Get buy in from the group – read materials, attend workshops, webinars
- **Empower Others to Act** - remove barriers – provide resources, support – authority and responsibility. Get board members to participate in training
- **Produce Short Term Wins** - ensure some early successes, meet them where they are, try out some easy ideas
- **Don't Let Up** - Raise expectations for change as you go. Work with KRM to access whole range of SULAM programs
- **Create a New Culture** – Anchor the change – SEL – SCL - Kehilla Strengthening



Strategic Planning Challenges

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



Help ensure your
plans
don't sit on the
shelf.

Are you ready to start?

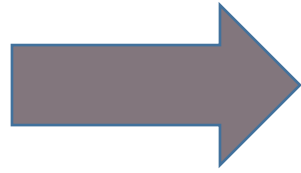
- There is urgency for change
- **Clergy are supportive**
- Key leaders are committed to planning
- Some **financial support** for planning (flights, hotels for two training sessions)
- No major initiative competing – e.g. rabbinical search or capital campaign
- Capacity for creativity - willing to recruit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



Your KRM and Transformation Specialist will help you determine if you are ready

Sulam for Strategic Planners

Why are you interested in strategic planning?



Enter
questions in
the chat box

Program Pillars

How this program
will support You

Program Pillars

SSP Supports Your Team

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



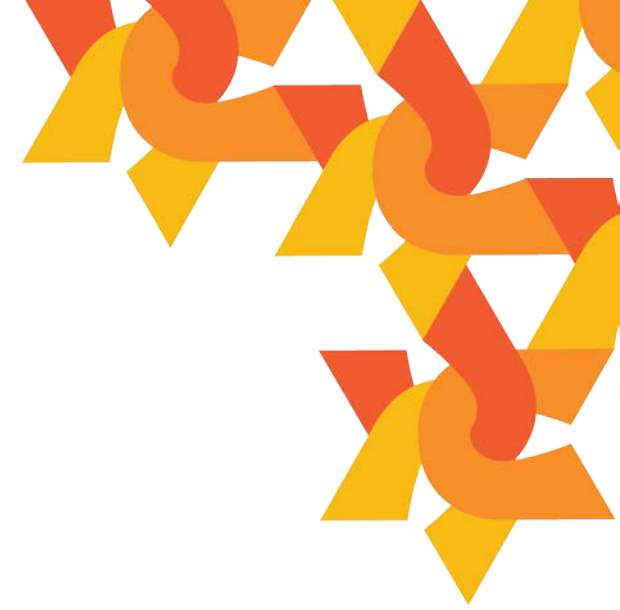
Sulam for Strategic Planners

Defining Scope of Planning

Shared Commitment to Planning

Key SSP Sessions

- Joint**
 - Form Committee
 - May 2015
- Self**
 - SWOT
 - June- July 2015
- Self**
 - Survey and Committee Interviews
 - June-July 2015
- Self**
 - Debrief Survey
 - August- September 2015
- Joint**
 - Vision and Mission
 - October- November 2015
- joint**
 - All Task Force Meeting
 - January 2016
- self**
 - Task Force Meetings
 - February- May 2016
- Joint**
 - Priority Setting Workshop
 - May- June 2016



Steering Committee (SC)

Size and Composition (10-14)

- **Core (4-6)**
 - President and incoming President
 - Senior Rabbi or Other Clergy
 - Two Co-chairs
 - Executive Director (when available)
- **Others (6-8)**
 - Seek mix of different **skills**
 - Ensure members share **core competencies**
 - Key influencers- past leaders



Please review our
Tips for Successful
Steering
Committees.

*“It was exciting to
see our SC come
together as a team
during the SWOT
analysis”- Ron Meir,
Congregation Beth El
Orange, NJ*

What is their **time** commitment?

Steering Committee Leadership Team

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

Task Force Members

- Go to All Task Force Meeting and then have **3-4 meetings**. This will require efforts of **20-50 people**.



Sulam for Strategic Planners

Situation and SWOT Analysis

Congregational Surveys and Committee

Interviews

Shared Assumptions

Situation and SWOT Analysis

Capacity to Possibilities

Internal- forces, trends and factors inside the synagogue that impact our future	Strengths	Opportunities (partners)
External- forces, trends and factors outside of the synagogue that impact our future	Weaknesses	Threats (competitors)



Congregational Surveys and Debriefs

SSP Congregational Survey, 1900 responses, October 2013



Membership Elements	Percentage Who Rated Very Important
Sense of Community	59.8 %
Warm and Welcoming	59.1 %
Branch of Judaism	57.1 %
Rabbi	56.4 %
Content of Services	43.7 %
Location	44.0 %
Vision of Clergy	38.2%
Cantor	30.7%
Friends of neighbors belong	28.5%
Social Aspects	28.5 %

How do you engage in the 21st Century?



SSP Congregational Survey Debrief

- After reviewing the data , what are the three (3) biggest themes that emerge for you as a planning leader?
 - 1
 - 2
 - 3
- After reviewing the survey findings, what gives you the most hope?
- After reviewing the survey findings, what creates the most concern?
- Take one of your themes and describe what a new direction would be like
We would shift from x to y.
- Review the list of suggestions. Please pick one that excites you



Sulam for Strategic Planners

Mission/Vision Statements

Shared Vision



Mission Statements

Key Questions

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

Adas Israel Vision Statement



Members Area

Enter search term

Go

- Membership
- Shabbat & Worship
- Monthly Chronicle Newsletter
- Learning
- Tikkun Olam/Social Action
- Life Cycle Events
- Volunteers
- Gift & Judaica Shop
- Vision of Renewal
- Donate



Our Vision

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



Kehilah Kedoshah (A Sacred Community)

We are one community with many faces. Our Conservative congregation is marked by a joyful spirit of warmth, participation and religious aspiration. Among our many minyanim, study groups, and service opportunities, there is one that can make each of us feel at home in our congregation.



L'Dor Va'Dor (From Generation to Generation)

We honor our past and celebrate our evolving Jewish future. Through a powerful chain of tradition and meaning, our members of all ages take pride in supporting our children, youth and young adults in discovering their Jewish futures.



Eitz Hayim Hi (It is a Tree of Life)

We all learn Torah from one another. With opportunities for growth and life-long learning, we enable each in this diverse community, regardless of age or background, to find a path into Torah, personal meaning, and Jewish life.



Ahavat Yisrael (Love of Israel)

We recognize and support Israel as the heart of the Jewish world. As such we find ways to celebrate and uphold the Jewish state through travel to Israel, as well as through educational and outreach programs.



Ohr Olam (A Light to the World)

We are a longstanding pillar of Jewish Washington, and continue to lead through innovation, and in advocating justice and performing charity. Our leadership inspires us to uphold justice through Tikkun Olam (Repairing the World), and through Gemilut Hasadim (Acts of Lovingkindness) to those in need. Our arms are open in kindness and righteousness to the wider Jewish community, to the greater Washington community, and beyond.



Mevakshei Derech (Seeking the Path)

We are a congregation devoted to seeking an ever evolving path for Jews of all backgrounds to discover personal meaning, inspiration, and insight. Through innovative programs, outreach, and openness to cutting-edge ideas, we are a spiritual center for a new century, where all people are always welcome to come and find personal significance and new ways into Judaism.



Sulam for Strategic Planners
Strategic Direction of Task Forces
Shared Direction

Strategy

- A method or plan to bring about a **desired future...**
- ...**Marshalling resources** for their most efficient and effective use.
- <http://www.businessdictionary.com/definition/strategy.html#ixzz297RFwegx>

From the Greek word ("Strategos") for generalship.



Your Next Move?
What do you want to do differently or better than others to increase your value proposition?

Strategic Direction for Task Forces

Report Template

Final Work
Product

- **Members**
- **Situation – Background** – Fact Book, Interviews, Survey, SWOT – Data Gathering Team
- **Vision** – From Vision Builder Exercise – Vision Team
- **Strategies** – From Co-Chairs, SC and Staff
- **Recommendations** – Task Force, then approved by SC



Sulam for Strategic Planners

Priority Setting of Recommendations & Report

Final Report & Implementation

Decision Criteria

What **factors** should we consider in evaluating our recommendations?

Factors

- Increase revenue
- Reduce cost
- Reduce a risk
- Develop a donor
- Promote a principle
- Enhance perceived value
- Build our brand- reputation



SSP Final Report Template

Welcome

- Letter from Rabbi, President and Chairs
- We are proud to report... Want to thank all... Names
- SC
- Task Forces

Overview of SSP Process

- Key Steps in Process

Background to Plan

- Current Situation- SWOT Summary

Emerging Themes and Strategies

- Congregational Survey- Executive Summary of Findings
- Themes and Shifts

Looking Forward

- Mission and Vision



Task Force Reports

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

Three Year Budget Forecast

Implementations Plan

- Overview of Implementation Approach
- Board Role



Implementation Plan



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

ST = Short Term- 0-6 months, MT = Medium Term- 6-18 months, LT = Long Term- 18+ months
 P= Professional V= Volunteer*

Thank you

Sulam for Strategic Planners