URJ Scholar Series on Leadership

A Resource and Discussion Guide to Inspire Sacred Action at Your Congregation

2015–2016 5776
Foreword

The Scholar Series on Leadership creates an opportunity for learning and conversation about key concepts in leadership. We recognize the challenges that congregational leaders face as they move from the mundane to the holy and from management to leadership. The Scholar Series is therefore meant to assist all leaders in navigating between their organization’s overarching vision and the day-to-day needs of the community they serve. By introducing key challenges facing those in leadership along with study guides, we hope to promote an open exchange of ideas among and between professionals and lay leaders in order to deepen and nurture these critical sacred partnerships.

As you use the materials in this resource, you will notice a few overarching ideas about congregational leadership:

• Congregational leadership is about sacred action.

• Successful congregational leadership requires a commitment to sacred partnerships with fellow leaders, professionals, congregational members, those connected to your community, and those not yet part of your community.

• Ongoing learning is essential to effective leadership.

The 2015-2016 Scholar Series features three exemplars in their fields, each presenting a current hot topic for congregational leaders:

• **Allison Fine**—“Making People Matter: More than Just Something We Say”: Developing a congregation’s mission, vision, and values isn’t a role only for executives in a vacuous, endless churn of emails and meetings. In this session, Fine talks about how inviting a cross-section of members to participate in developing a mission, vision, and values statement helps everyone feel like they have a stake in these organizational guideposts. This ensures that these values stand as the foundation of congregational activities and goals.

• **Marty Linsky**—“Leading in Challenging Times”: Change is the new constant. Adapting to a fast-paced, changing environment and leading others through that change are both challenging and rewarding. In this session, Linsky explores the contemporary demands on leaders and their need to adapt while finding a balance between present and future.

• **Rabbi Jay Moses**—“Collaboration Won't Kill Us... But Failing to Collaborate Might”: We can’t successfully exist in a silo. Collaboration allows congregations to multiply their resources in ways that are advantageous to all who seek to work together. In this session, Rabbi Moses delves into the effective reasons to collaborate, the contemporary circumstances that necessitate collaboration, and adopting a mindset that embraces collaboration.

All three sessions are presented in this resource in their entirety and are also accompanied by several resources, developed especially for congregational leaders. These companion pieces are designed to provide a framework for ongoing conversations and learning around these topics.

For each scholar and topic we have provided:

• A brief video of the scholar describing the *ikar*, the central focus of the learning.

• The full recording of the learning session that can be used for either a pre- or post-assignment.

• A 5–7 minute highlights clip taken from the full learning session that can be used during a discussion or as a pre-assignment.

• An article written by the scholar on their specific topic.
Two responses to the learning by congregational presidents.

Study guides using the various resources, which can be used with your:

- Board of Trustees
- Executive Committee
- General Committees and/or Task Forces
- Senior Staff
- Executive Committee and Professional Staff

There are a variety of ways in which you might consider using these resources: perhaps as the opening learning for your Board meeting or to encourage the Executive Committee and Senior Staff to meet and discuss some larger topics in leadership that pertain to goals you are seeking to achieve. You may choose to focus on one, two or all three topics in the various layers of congregational leadership. The Scholar Series is meant to be flexible to meet the needs of your congregation. Should you so desire, the Leadership Institute is here to assist you in the implementation of this resource. You can reach us at leadershipinstitute@urj.org.

It is our desire to inspire sacred action based on significant ideas within the realm of leadership. We hope that this resource will assist you in having meaningful conversations among your leadership and in strengthening your congregation!

Lisa Lieberman Barzilai, RJE
Director, Leadership Institute
Union for Reform Judaism
Scholars

ALLISON FINE is among the preeminent guides to the social media revolution. She is author of *Matterness: Fearless Leadership for a Social World*. In addition, she is the author of the award-winning *Momentum: Igniting Social Change in the Connected Age*, co-author of the bestselling *The Networked Nonprofit*. She is a member of the faculty of the *Union for Reform Judaism* and serves on the boards of Civic Hall, NARAL, and *The Sunlight Foundation*.

MARTY LINSKY has been teaching about leadership at the Harvard Kennedy School for more than 30 years. He is the co-founder of Cambridge Leadership Associates and the co-author of *Leveling the Playing Field: Advancing Women in Jewish Organizational Life* and *Leadership on the Line*, among other books.

RABBI JAY MOSES is Vice President of *The Wexner Foundation*. He served for many years as Director of the Wexner Heritage Program, which trains outstanding volunteer leaders in Jewish history, Jewish thought, and contemporary Jewish leadership. Prior to joining the staff of The Wexner Foundation, he was associate rabbi of *Temple Sholom* of Chicago.

Special Thanks

One of the key concepts on which the URJ Leadership Institute is built is that congregational leaders learn with and from each other. Therefore, in addition to the knowledge gleaned from our scholars, this resource also includes pieces written by the following congregational presidents:

Loree Farrar: President of Congregation Beth Am, Los Altos Hills, CA

Steve Feinstein: President of Temple Beth Orr, Coral Springs, FL

Pat Ninburg: President of Kol HaNeshamah, Seattle, WA

Pam Scheer: Co-President of Temple Beth Shalom, New Albany, OH

Brian Seidman: President of Temple Emanu-El, Dothan, AL

Donna Thalblum: President of The Temple, Congregation B’nai Jehudah, Overland Park, KS

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Nearly every synagogue faces enormous pressure to recruit and retain members. Yet, when Big Tent Judaism conducted its signature research project (the Environmental Community Outreach Scan) in northern Westchester county last year to test, among other things, how “warm and welcoming” synagogues were, an overwhelming number of synagogues failed to respond to emails and calls from prospective members. While there were nuances, the bottom line is that synagogues are not as responsive as they think they are.

These failures reflect the enormous gap between the good intentions of people running synagogues and the actual experiences of new or existing members. People have lots of choices about where and how to spend their time and money, and increasingly, they reject institutions that use a secret language, make them feel anonymous and unimportant, talk at them rather than with them, and only seem to need them when their dues are late.

This behavior confounds the synagogue leaders who are working so hard to keep people engaged and informed. “We’re busy every day!” they say—answering calls, sending out letters and bills, getting kids ready for their b’nai mitzvah. Yet it is exactly this internal busy-ness, the fear of losing control and the obsession with efficiency, which pushes people farther away.

There is an alternative to this way of thinking and working that I call “matterness.”

Matterness means refocusing efforts to make sure people feel known, acknowledged, and empowered. It happens everywhere—online and on land, in the hallways, in boardrooms, and in living rooms.

Matterness means asking more than telling, putting aside the old management mantras that staff are supposed to have all of the answers and that working fast is the same as working smart.
Here are a few steps congregations can take to increase matterness and begin to close the gap between the values synagogues espouse and the experience of potential and existing members:

1. **Check your default settings.**

   The culture of an institution reflects the values and assumptions of its leaders. If leaders are afraid to let go—if they assume that the answers are all inside and never outside—then the default settings, automatic responses, and processes become closed rather than open. The result is that synagogues become fortresses in which it is difficult for prospective members to know what goes on inside, much less get in to see for themselves. It is the reason so much time is spent in meetings discussing what could possibly go wrong—if the likelihood of that happening is very small.

   These defaults need to be questioned to figure out what is powering the to-do list. Questions can include:
   
   • What are we doing to encourage or discourage new ideas and experiments?
   • To whom do we talk regularly? If it’s the same people over and over again, how can we break this pattern?
   • Do we create new programs behind closed doors rather than talk to our congregants about developing new ones together? Do we even need new programs, or could we just get together and socialize without agendas and curricula and speakers?

2. **Work with your people, not at them.**

   Too often, annual programming becomes a cycle of doing the same thing as last year, with few changes. Time to wake up from business-as-usual! Figuring out what’s going to happen next year shouldn’t just happen behind closed doors, especially when there’s a wealth of latent capital sitting untapped in your congregation.

   Ask congregants for their reaction to programming ideas online before they’re set in stone. You can even run a Sunday afternoon programming day where congregants can participate in developing programs that interest them and that they spearhead. Your congregants have skills, passions, creativity, and connections that will be unleashed only when you start co-creating programs with rather than at.

3. **Measure matterness.**

   Synagogues often measure outputs: how many people show up to events, how many new members join, how much was donated to our annual fund. These are useful proxies for satisfaction, but they aren't enough.

   Congregations need to know whether and how they are making people feel known, cared for, and empowered. The questions have to be asked explicitly: “How do we make you feel?” Do you feel like you are known and appreciated here? “When and how do we make you feel like an ATM?” And, of course, “How could we make you feel like you matter more to us?”

   Synagogues are vitally important in communities, but before you create one more program or have one more staff meeting that focuses on what could possibly go wrong, stop and ask yourself this question: How would working this way make you feel if you were on the outside looking in?
Presidential Response to Allison Fine’s Session on Matterness

Loree Farrar, Congregation Beth Am, Los Altos Hills, CA

For me, the most compelling part of Allison Fine’s URJ Scholar Session was the story Allison shared about an elderly congregant, a regular at services, who missed a week because she was hospitalized. The congregant was upset because no one noticed she was missing. It was like whether she was there or not didn’t matter to anyone.

“Matterness” is not just about “you matter”, it’s about “you matter to ME.” Someone saying “my life is poorer because you didn’t show up - I’m concerned - what’s up?” It’s about mattering to people, not to institutions.

The challenge we face as synagogues is that, in fact, we are institutions. We don’t need to create caring institutions, but rather, we need to establish a culture of caring, and tools to support that culture.

At smaller shuls, the rabbi can reasonably have a sense of his or her flock, and can make a call if it seems that something is amiss. This is not realistic for larger congregations. To be truly effective, and not dependent on a caring and observant rabbi, we need to come up with approaches that are shared across the congregation, so that we can all be eyes and ears and caring voices.

The story about the elderly congregant highlights another issue: practicing “matterness” is harder at Reform synagogues. We are very respectful of each other’s choices and understanding of each other’s busy schedules. If someone doesn’t show up, there’s an assumption that they made another choice. Whereas, if a regular doesn’t show up at an Orthodox shul, there would be more of an assumption that something is wrong, and that perhaps someone needs to call the congregant. Can we notice an absence without seeming to judge it? I think so, but it’s not our practice.

It is really hard to institutionalize caring. When my step-mother died, I called the office of my large synagogue to let them know, and they kicked into action. An email went out to everyone; I received a handwritten note from the Caring Committee, a call from a rabbi, and a very nice letter, outlining the services that were available and the ritual actions I might want to take. All of these are good things, and I’m glad that we do them. However, what impacted me the most was the notes and emails from people I actually know, expressing condolences, remembering stories, and sharing similar experiences. I was also touched by the people who came up to me at services to let me know they are thinking of me. That made me feel like I matter. So of all the nice things that my congregation did, the most important one ended up being the broadcast email letting the congregation know what was going on in my life. (Note to self: next time I receive a similar email regarding someone I know, be sure to send a note to the person impacted. Warm and caring thoughts just aren’t enough.)

So how do we establish a culture of caring and the tools to support that culture? Some ideas come to mind:

• Make it easy to find each other’s email and phone numbers, and establish a norm that it’s a good thing to reach out; it’s not nosy or invasive.
• Announce life events widely and encourage folks to respond.
• Keep track of who knows whom, so that they can be encouraged to support each other. (Is there software that can do this? Sort of like LinkedIn for shuls?)
• Take attendance. I know, sounds like kindergarten. But that’s how we can see that someone has fallen off the map, rather than just missed a week.

Consider which of these suggestions might work in your congregation and what other things you can do to show people they genuinely matter.
The Torah tells that the Israelites wandered through the desert carrying the Tabernacle, their movable site for sacrifice and communion with God. Not every Israelite could enter the Tabernacle; rather God designated priests, whose job it was to administrate the sacrificial offerings and perform other duties. When the Temple was destroyed, worship became decentralized and prayer came into greater prominence.

We can see in this the seeds of modern Jewish practice, in which we still worship communally with a rabbi, but most of us also value and find fulfillment in the prayers we might say individually or at family celebrations. In this way, Judaism has evolved from a top-down system, in which the Israelites were dependent on priests, to a networked system where worship is shared equally among individuals and the community.

Allison Fine, in her URJ Scholar Session “Making People Matter—More than Just Something We Say,” talked about “matterness” in synagogue life. Specifically, Fine discussed how synagogues have to overhaul a similar kind of top-down practice—not in terms of worship, but in terms of programming and how synagogues engage and tend to their members. Too often, Fine says, in order to maintain organization and control, synagogues “churn” out programs and life-cycle events for congregants without stopping to study and explore what the congregants actually want or need.

I wrote in a recent bulletin column for my synagogue, Temple Emanu-El in Dothan, AL, about the idea of being mindful or “mind-full,” a concept I learned about at the URJ Scheidt Seminar for Presidents and Presidents-Elect; I discussed how our attempts to be mindful can end up with us having our minds full. The “churn” that Fine talks about, in terms of the day-to-day business of maintaining the synagogue, can sometimes erode having longer-term discussions about how to grow the synagogue for the future.

Thankfully, a dedicated board member at our temple suggested creating a “future-planning committee,” which will work with focus groups at our congregation. This process will help us determine both what the synagogue is doing well and should keep doing, and also where we can improve and meet the congregation’s needs better. I have also tried to take a little time in our board meetings to brainstorm items that the board wants to talk about in future meetings. I hope that this can empower our board to not only tend to the “churn,” but also to speak up about issues that are important to them, which they might otherwise refrain from mentioning.

Fine strongly recommends using social media to help individual congregants feel like they have a voice. These “open” networks enable congregants to self-organize and help shape the synagogue. By creating a forum for open conversation between the rabbi, temple lay leaders and the congregation, I can certainly see how we might increase the feeling of “matterness” among all the members of the synagogue. However, in considering this for our congregation, I feel that there are a number of issues that we would have to address. The first of these issues is the representation of some congregants, perhaps less technologically-inclined, who may not use social media. Additionally, we would also need to look into privacy concerns (for example, whether a congregant might not want their simcha or illness mentioned on social media). In examining new ways to create “matterness,” we want to be sure not to alienate any congregants either.

Our Temple Board recently faced a challenge related to “matterness” and communication; we routinely send out our weekly and monthly bulletins by email as a PDF attachment, to save time and disseminate information quicker. However, some congregants approached the board to ask for paper copies to be mailed—some because they did not have email access and some simply out of preference. These congregants were willing to help defray the cost, so the board put this into effect immediately. Though there are many high-tech solutions to “matterness,” sometimes the old ways are best if they work for the congregation.

I agree, as Fine states, that what members of a congregation most want to feel is that they “matter as a person” to their community. Our challenge as synagogue leadership and as a congregation is to find continuing methods of bringing this “matterness” to the congregation in ways that are meaningful, that helps ensure our future, and that are also cognizant of meeting the congregation in all the different places they need or want to be reached.
Study Guide—“Matterness”

Allison Fine’s philosophy emphasizes creating a new culture of leadership focused on making others feel heard, acknowledged, and empowered. She says that this is about co-creating: not “us and them,” but rather, “everyone is a part of us.” Fine urges us to consider the institutional barriers that get in the way of people mattering more. She challenges us to consider how we can help people feel heard, know they matter, and feel known rather than anonymous.

Fine uses the term “Matterness” to understand how congregations can help members feel that they matter. She defines the concept as refocusing efforts to make sure people feel known, acknowledged, and empowered. Fine says it happens everywhere—online and on land, in the hallways, in boardrooms, and in living rooms. “Matterness” means asking more than telling. It means setting aside the old management mantras that staff are supposed to have all of the answers and that working fast is the same as working smart. Starting with this definition, she has developed several concepts to help congregations pay attention to the details that help them become communities of meaning and connection.

In encouraging congregations to think about their values, Fine shares the notion of “Minding the Gap,” the idea that there is often a gap between the values we espouse and the experience of people in our congregations. Fine encourages congregational leaders to try to think about what the experience really is for the less engaged or new congregant. In paying attention to the way less engaged congregants may feel, congregational leaders should think about how they connect with and build connections among members.

In Matterness, Fine uses the concept of “Big Small Towns” to help us think about how congregations can be 21st century communities that “live” both online (in the virtual world) and on-land (face-to-face). She defines the term “Big Small Towns” as the sum of on-land and online communities that combine the intimacy and caring of old-fashioned towns with the ease of connections, expansiveness, and never-ending resources of the Internet. Most importantly, Big Small Towns enable people to be what they are intended to be: connected, caring, curious, and capable (Matterness, p.35). These concepts are the basis of the conversations and learning activities that we have designed for different leaders in your congregation.

Each worksheet below is based on a selected section of Fine’s live teaching, and will encourage leaders to create a greater sense of “Matterness” within their congregation. While there are different activities and slightly different areas of focus for each group of leader-learners, it is recommended that the participants in each leadership group begin by listening to the highlights clip above. The highlights clip focuses on how the idea of “Matterness” and the concept of “Big Small Towns” help us to engage congregants more effectively.

Big Ideas

- People need to know that they matter.
- To be successful in making congregants feel that they matter, we need to work with them, not at them. We need to make them feel known, acknowledged and empowered.
- “Matterness” means asking more than telling. It means setting aside the old management mantras that staff are supposed to have all of the answers and that working fast is the same as working smart.
- “Matterness” is about “Minding the Gap,” that is to say, being aware of the distance between your espoused values and the experience of potential and existing members.

Essential questions

- What is “Matterness”?
- What do we do to show members of our congregation that they matter?
- What additional actions can we take to help members of our congregation know that they matter?
Board Meeting—Creating a Culture of Caring in Our Congregation

NOTES FOR FACILITATOR
The discussion for this topic is based upon the presidential response from Loree Farrar of Congregation Beth Am in Los Alto Hills, CA. Read her full response or share the excerpt below with the group.

Farrar discusses the idea of helping people feel like they matter as a tool for creating a culture of caring within the congregation. She shares several ideas that Allison Fine’s teaching inspired, and asks each of us to consider more ideas that might work within our own congregations. The focus of this activity is to identify concrete actions for your congregation.

25-30 minutes are recommended for this activity. If you have more time to allot, you can work together to select prioritized suggestions to begin working on.

Materials Needed
• Post-it notes
• Paper
• Markers
• Worksheet
• Pens/pencils

Activity
• Distribute the worksheet for this session.
• Discussion of Farrar’s Response (5-7 minutes)

Give each board member a few minutes to answer the questions on their own, then discuss as a large group:
• How does our congregation define “A culture of caring”?
• In what ways do Farrar’s suggestions align with, or differ from, our definition?
• How do Farrar’s suggestions promote the notion of Big Small Towns?

Brainstorming (10 minutes)
• Ask board members to work in small groups to generate additional ideas to promote a culture of caring. This activity will work best if groups are seated at round tables or if they can move chairs so they are sitting in a circle.
• Share Fine’s notion of Big Small Towns to help inspire new ideas (in the worksheet).
  • The goal is to generate as many ideas as possible, as quickly as possible. Write each idea on an individual post-it note.
  • Take the last 2 minutes for groups to sort their ideas into categories. They should use the full-sized paper to make a sign for each category and attach the Post-its that match.

Prioritizing concrete actions (7–10 minutes)
• Have groups present their categories. Hopefully there will be some overlap.
• Re-sort groups by allowing board members to choose which category they wish to work on.
• Once in new groups, board members should work together to prioritize the different suggestions in each category. (Have groups work quickly on this—using up to 3-5 minutes to make their selection.)
• Select one prioritized item and consider:
  • Who should be involved in this? (Consider both those who will do the work and those who will be served.)
  • What are concrete action items to get you started?
  • Invite groups to share their action items with the large group.
  • Collect and save for review and continued action at a follow-up meeting.
• If there is time, invite groups to share which activity they prioritized.
“So how do we establish a culture of caring and the tools to support that culture? Some ideas come to mind:

• Make it easy to find each other’s email and phone numbers, and establish a norm that it’s a good thing to reach out; it’s not nosy or invasive.
• Announce life events widely and encourage folks to respond.
• Keep track of who knows whom, so that they can be encouraged to support each other. (Is there software that can do this? Sort of like LinkedIn for shuls?)
• Take attendance. I know, sounds like kindergarten. But that’s how we can see that someone has fallen off the map, rather than just missed a week.

Consider which of these suggestions might work in your congregation and what other things you can do to show people they genuinely matter.”

Loree Farrar, Congregation Beth Am, Los Altos Hills, CA

In her book, *Matterness*, Allison Fine defines Big Small Towns this way: Big Small Towns are the sum of on-land and online communities that combine the intimacy and caring of old-fashioned towns with the ease of connections, expansiveness, and never-ending resources of the Internet. Most importantly, Big Small Towns enable people to be what they are intended to be: connected, caring, curious and capable.

**Questions for discussion**

• How does our congregation define “A culture of caring”?

• In what ways do Farrar’s suggestions align with, or differ from, our definition?

• How do Farrar’s suggestions promote the notion of Big Small Towns?
Executive Committee—Becoming a Big Small Town

NOTES FOR FACILITATORS

The discussion for this session is based upon the highlights clip of Allison Fine's learning session. It should encourage the Executive Committee to consider what steps your congregation can take to effectively model what it means to be a “Big Small Town.” Please be sure to share the link to the highlights clip prior to the meeting, so everyone can listen in advance. It is less than 5 minutes long.

In her book, *Matterness*, Fine defines “Big Small Towns” this way: Big Small Towns are the sum of on-land and online communities that combine the intimacy and caring of old-fashioned towns with the ease of connections, expansiveness, and never-ending resources of the Internet. Most importantly, Big Small Towns enable people to be what they are intended to be: connected, caring, curious and capable.

This activity will take approximately 35 minutes

Materials Needed

- Copies of worksheet

Activity

Sharing our stories (10 minutes)
- Begin by asking Executive Committee members to share one thing about themselves that people in the room might be surprised to learn. The idea of this is to be quite light.
- Take a few minutes to reflect:
  - Was it hard to think of something to share? If so, why do you think you found the task difficult?
  - Was it hard to share? Why or why not?
  - What new information did this activity enable you to learn about fellow members of the Executive Committee?

Where does our communication live? (10 minutes)
- Be sure you have a recorder to capture the conversation.
- Would you say our congregational communication lives primarily online or on-land?
- What artifacts reinforce our belief?
- How might the congregation benefit from “living” more in the other place (that is to say, if you are more on-land than online, or vice-versa)?

Becoming a Big Small Town (10 minutes)
- Read Fine's definition of Big Small Towns (in the worksheet). You may want to post the definition on the board.
- Discuss:
  - What in this definition is compelling to you?
  - In what ways does our congregation function as a Big Small Town?
  - What are the challenges to effectively serving our congregation as a Big Small Town?
- For Fine, at the core of becoming a Big Small Town is learning the stories of members. Discuss:
  - What steps can our congregation take to collect, share and understand the stories of individuals in our congregation?
  - How do you imagine using these stories to strengthen our congregation?

Reflection (5 minutes)
- What first steps can/should our congregation take to become a more successful Big Small Town?
Executive Committee Worksheet

In her book, *Matterness*, Allison Fine defines “Big Small Towns” this way: Big Small Towns are the sum of on-land and online communities that combine the intimacy and caring of old-fashioned towns with the ease of connections, expansiveness, and never-ending resources of the Internet. Most importantly, Big Small Towns enable people to be what they are intended to be: connected, caring, curious and capable.

Questions for discussion

- What in this definition is compelling to you?

- In what ways does our congregation function as a Big Small Town?

- What are the challenges to effectively serving our congregation as a Big Small Town?
Committee or Task Force Meeting—Questioning Our Default Settings

NOTES FOR FACILITATOR

The discussion for this session is based upon Allison Fine’s article. It focuses on the concrete steps she outlines to close the gap between the values synagogues espouse and the experience of potential and existing members. Please make sure all participants have had a chance to read the article prior to the session.

This activity will take approximately 40 minutes.

Materials Needed

- Copies of Fine’s article (it is short enough that handouts can be shared at the session)
- Definition of “Matterness,” either written on the board, a poster, or individual sheets for each participant
- Copies of discussion worksheets
- Pens/pencils

Activity

Begin by reviewing Fine’s Definition of “Matterness”: (10 minutes)

“Matterness” means refocusing efforts to make sure people feel known, acknowledged, and empowered. It happens everywhere—online and on land, in the hallways, in boardrooms, and in living rooms.

“Matterness” means asking more than telling, setting aside the old management mantras that staff are supposed to have all of the answers and that working fast is the same as working smart.

Discuss these questions with the committee:

- What in these definitions resonates with you?
- What is unclear or what do you have questions about in the definition?

Ask participants to vote about how well they feel your congregation is doing on creating Matterness in the congregation:

- If participants feel you are excelling at Matterness, they should hold up 5 fingers.
- If participants feel you are OK at Matterness, they should hold up 3 fingers.
- If participants feel Matterness is a significant area of growth for the congregation, they should hold up 1 finger.
- Have everyone glance around the room to get a sense of where you feel you are.

“Minding the Gap”—Where do you feel is the greatest gap between our espoused values and the experience of potential and existing members? (15 minutes)

For Fine, “Matterness” is about “Minding the Gap,” that is to say, being aware of the distance between your espoused values and the experience of potential and existing members.

- There are two ways you can do this portion of the activity:
  - Bring in copies of your mission statement and pull the core values from that statement.
  - Spend a few minutes brainstorming what you think the board members consider to be the core values of your congregation.
- Discuss—which value do you think our congregants most experience and understand?
- Discuss—which value do you think is least felt or experienced by members and potential members, and why?
Text study to help close the gap (15 minutes)

- Break into 3 groups. Assign a space for each group to gather, and hand out appropriate worksheets (see in following pages).
- Supply each group with a flip chart or large Post-it notes and marker and ask for a volunteer to act as scribe.
  - Group 1 will discuss—Check your default settings
  - Group 2 will discuss—Work with your people, not at them
  - Group 3 will discuss—Measure “Matterness”

Reflection—Bring the participants back together and invite groups to share suggestions from their conversation. Discuss how these conversations should inform the work of the task force or committee moving forward. (10 minutes)

- Make sure you collect the notes from each group and share with board or executive committee as appropriate.
- Be sure to put this on a later committee agenda, so you can begin working toward addressing the suggestions that arise today.
Committee/Task Force Worksheet 1—Check Your Default Settings

Allison Fine’s Definition of “Matterness”

“Matterness” means refocusing efforts to make sure people feel known, acknowledged, and empowered. It happens everywhere—online and on land, in the hallways, in boardrooms, and in living rooms.

“Matterness” means asking more than telling, setting aside the old management mantras that staff are supposed to have all of the answers and that working fast is the same as working smart.

The culture of an institution reflects the values and assumptions of its leaders. If leaders are afraid to let go—if they assume that the answers are all inside and never outside—then the default settings, automatic responses, and processes become closed rather than open. The result is that synagogues become fortresses in which it is difficult for prospective members to know what goes on inside, much less get in to see for themselves. This is the reason so much time is spent in meetings discussing what could possibly go wrong, even if the likelihood of that happening is very small.

These default settings need to be questioned to figure out what is powering the to-do list. Questions can include:

• What are we doing to encourage new ideas and experiments?
• What are we doing to discourage new ideas and experiments?
• To whom do we talk regularly? If it’s the same people over and over again, how can we break this pattern?
• Do we create new programs behind closed doors rather than talking to our congregants about developing new ones together? Do we even need new programs, or could we just get together and socialize without agendas and curricula and speakers?

Questions for discussion

What is Fine’s primary message in this text?

Discuss Fine’s questions.

What additional questions do you need to ask to “figure out what is powering the to-do list”? 
Committee/Task Force Worksheet 2—Work with your people, not at them

Allison Fine’s Definition of “Matterness”

“Matterness” means refocusing efforts to make sure people feel known, acknowledged, and empowered. It happens everywhere—online and on land, in the hallways, in boardrooms, and in living rooms.

“Matterness” means asking more than telling, setting aside the old management mantras that staff are supposed to have all of the answers and that working fast is the same as working smart.

“Too often, annual programming becomes a cycle of doing the same thing as last year, with few changes. Time to wake up from business-as-usual! Figuring out what’s going to happen next year shouldn’t just happen behind closed doors, especially when there’s a wealth of latent capital sitting untapped in your congregation.

Ask congregants for their reaction to programming ideas online before they are set in stone. You can even run a Sunday afternoon programming day where congregants can participate in developing programs that interest them, which they will spearhead. Your congregants have skills, passions, creativity, and connections that will be unleashed only when you start co-creating programs with rather than at them.”

Allison Fine, Award-Winning Author and URJ Faculty Member

Questions for discussion

• What is Fine’s primary message in this text?

• What is our current process for determining annual programming?

  • What changes could open up our process for more congregant input?

  • What would be the benefits of having greater congregant input? What might be the challenges?

• What would it take to create a Sunday afternoon programming day, such as the one Fine describes above?

  • What could be the benefits?

  • What would be the challenges to creating such a program?
“Matterness” means refocusing efforts to make sure people feel known, acknowledged, and empowered. It happens everywhere—online and on land, in the hallways, in boardrooms, and in living rooms.

“Matterness” means asking more than telling, setting aside the old management mantras that staff are supposed to have all of the answers and that working fast is the same as working smart.

“Synagogues often measure outputs: how many people show up to events, how many new members join, how much was donated to our annual fund. These are useful proxies for satisfaction, but they aren’t enough.

Congregations need to know whether and how they are making people feel known, cared for, and empowered. The questions have to be asked explicitly: ‘How do we make you feel?’; ‘Do you feel like you are known and appreciated here?’; ‘When and how do we make you feel like an ATM?’; and, of course, ‘How could we make you feel like you matter more to us?’

Synagogues are vitally important in communities, but before you create one more program or have one more staff meeting that focuses on what could possibly go wrong, stop and ask yourself this question: How would working this way make you feel if you were on the outside looking in?”

Allison Fine, Award-Winning Author and URJ Faculty Member

Questions for discussion

• What is Fine’s primary message in this text?

• Consider her questions relating to Matterness: are there other questions you would like to ask members and potential members? What might they be?

• What is the appropriate setting for asking these questions?

• What do you imagine you would do with this data if collected?

• Do you feel committee meetings are conducted in such a way that, “from the outside looking in,” our work reflects a sense of Matterness? If so, how? If not, what needs to change?
Senior Staff Meeting—Becoming a Big Small Town

NOTES FOR FACILITATOR

The discussion for this session is based upon the highlights clip from Allison Fine's learning session. It encourages the senior staff to consider what steps your congregation can take to effectively model what it means to be a Big Small Town. While this activity is similar to the one done by the Executive Committee, the focus of this discussion is slightly different. It takes into account the different level of information senior staff typically have regarding congregant needs.

This activity will take approximately 50 minutes.

Preparation

- Please be sure to ask your senior staff to watch the highlights clip in advance of the meeting. It is less than 5 minutes long.
- Ask each senior staff member to prepare a short story of an interaction with a congregant or congregational family that they found surprising because it ultimately reflected how little they actually knew about the congregant or family.
- The idea is not to embarrass staff members or congregants, but to highlight what needs to be done in order to better understand the unique needs of each congregational family. They should be no longer than 5 minutes.

Materials Needed

Copies of Fine’s Definition of Big Small Towns

Activity

Sharing our stories (25 minutes)

- Begin the meeting by asking members to share their prepared stories.
- As staff members share, take note of the commonalities and differences between the stories. What are the commonalities and what can they teach you about interacting with congregational families?
  - Ask each staff member to reflect on how the stories they shared changed their practice or approach to working with congregational families. How can and should these changes inform the practice of the entire senior staff?
  - Where does our congregation live (online or on-land)? Considering how we communicate with our congregation. (10 minutes)

Have someone create a record of the conversations below:

- When considering how you interact with individual congregants, would you say our congregational communication lives primarily online or on-land (face-to-face)?
- How does this compare to the congregation at large? In what ways is the communication of the senior staff a mirror of the larger congregation? In what ways is it different?
- What information/data/evidence reinforce our belief?
- How might the congregation benefit from “living” more in the other place (that is to say if you are more on-land, then more online, or vice-versa)?
  - What changes would be necessary in order to live more equally in both spaces?
• **Becoming a Big Small Town** (10 minutes)

   • You may want to post the definition on the board or share copies with participants:

     In her book, *Matterness*, Allison Fine defines “Big Small Towns” this way: Big Small Towns are the sum of on-land and online communities that combine the intimacy and caring of old-fashioned towns with the ease of connections, expansiveness, and never-ending resources of the Internet. Most importantly, Big Small Towns enable people to be what they are intended to be: connected, caring, curious and capable (*Matterness*, p.35).

• Discuss the questions below:

   • What in this definition is compelling to you?
   • In what ways does our congregation function as a Big Small Town?
   • What are the challenges to effectively serving our congregation as a Big Small Town?

• For Fine, at the core of becoming a Big Small Town is learning the stories of members. Discuss:

   • What steps can we, as a senior staff team, take to collect, share and understand the stories of individuals in our congregation?
   • How can we use these stories to strengthen our congregation?

**Reflection** (5 minutes)

• What active first steps should the senior staff take to help the congregation become a more successful Big Small Town?
Executive Committee and Senior Staff—Moving from a Top-Down Approach to a Shared, Sacred Approach

NOTES FOR FACILITATOR

One key element to creating “Matterness” within congregations is to appreciate the unique talents we may not even know exist within the many members of our congregation. Fine speaks of developing a “co-creational” approach: creating opportunities for congregants to have a greater voice in the planning of congregational events.

The discussion for this session is based upon the presidential response from Brian Seidman of Temple Emanu-El in Dothan, AL. Seidman’s response focuses on the notion that “Matterness” is about taking note of the sacred in each of us and of the unique gifts we can bring. It reflects a shift away from a top-down approach of congregational planning, and encourages us to think about how we can engage more voices in the work of the congregation.

This activity will take approximately 30 minutes.

Materials Needed

• Copies of worksheet
• Index cards
• Post-it pads and markers OR Whiteboard and markers OR Chalkboard and chalk
• Pens/pencils

Activity

“Matterness” in our congregation (15 minutes)

• Begin by asking the participants to think about one experience/program/event at the congregation that they feel reflects the congregation’s commitment to Matterness (making sure members and potential members feel like they are known and that they matter).
• Hand out index cards to each participant and give them a few minutes to write their responses to the above question. Be sure participants briefly describing why and how they feel their example reflects Matterness.
• After the participants have finished, ask them to circle any words on the card that reflect action on the part of the congregation.
• Ask the participants to underline adjectives that describe the program/event or experience.
• On the board or on Post-it paper, create 3 columns:
  • Action
  • Adjective
  • Activity
• Invite participants to share what they wrote on their cards. A recorder should capture the Action, Adjective and Activity in the appropriate column of the board or Post-it paper.
• After everyone has shared, reflect on your three lists:
  • How many people shared the same event?
  • What was the most often repeated action? Adjective?
  • Are there activities/programs/events people expected to see that were not on the list?
  • What does this list tell you about your areas of success and your areas for growth?
**Discussion** (10 minutes)
- Break into groups of 2 or 3 professionals and lay leaders who don’t typically work together. You may want to pre-assign groups. Make sure there is a recorder and a spokesperson in each group.
- Hand out the worksheet with discussion questions and let the groups discuss.

**Reflection and Sharing** (5 minutes)
Bring the group back together and invite groups to share their approaches to co-creation.
- What are the similarities? What are the differences?
- Does there seem to be one approach that feels like the best way to invite more congregational voices into the planning process?
- Consider what steps you need to take in order to begin making this change.
- Be sure to collect the notes so that you can revisit this conversation and begin any important work that is recommended as a result of this activity.
Executive Committee and Senior Staff Worksheet

“The Torah tells that the Israelites wandered through the desert carrying the Tabernacle, their movable site for sacrifice and communion with God. Not every Israelite could enter the Tabernacle; rather God designated priests, whose job it was to administrate the sacrificial offerings and perform other duties. When the Temple was destroyed, worship became decentralized and prayer came into greater prominence.

We can see in this the seeds of modern Jewish practice, in which we still worship communally with a rabbi, but most of us also value and find fulfillment in the prayers we might say individually or at family celebrations. In this way, Judaism has evolved from a top-down system, in which the Israelites were dependent on priests, to a networked system where worship is shared equally among individuals and the community.

Allison Fine, in her URJ Scholar Session ‘Making People Matter—More than Just Something We Say,’ talked about ‘Matterness’ in synagogue life. Specifically, Fine discussed how synagogues have to overhaul a similar kind of top-down practice—not in terms of worship, but in terms of programming and how synagogues engage and tend to their members. Too often, Fine says, in order to maintain organization and control, synagogues ‘churn’ out programs and life-cycle events for congregants without stopping to study and explore what the congregants actually want or need.”

Brian Seidman, President, Temple Emanu-El, Dothan, AL

Questions for discussion

• How does the text reflect the move from a top-down to a more networked system?

• How is the notion of a networked system reflected in the work of our congregation?

• How is work shared among lay leaders and professionals?

• When does this work best?

  • When is it a challenge and why?

• What do you currently do to engage congregants in the co-creation of programming and congregational events?

• How might you give congregants a greater voice in co-creation of programming and congregational events?

• What are the potential challenges to this approach?

  • What are the potential benefits/impact?
The challenges facing Reform Judaism may feel unique, but they reflect larger forces sweeping through society. In the Jewish world, the Reform Movement faces issues that are all too familiar: the high rate of intermarriage, the pull of other Movements, including Orthodoxy and Chabad; and the disinclination of Jewish millennials, like their non-Jewish peers, to identify with institutions of any kind, particularly the traditional ones that were part of their childhood.

In the broader community, we are in the midst of a period unlike any before in our lifetimes. Change—and rapid change, at that—is a constant, with all the consequences attendant to it. The future is uncertain and unpredictable, and decisions must be made with inadequate information.

If you’re reading this, it’s likely because you care deeply about the future of the Reform Jewish Movement. If you had figured out how to ensure its robust continuation, you’d presumably be doing it already rather than reading this article! By virtue of your involvement with the Reform Movement as an institution, you are, in some profound way, searching without a clear path forward.

And yet, ironically, you are among the best and the brightest the Movement has to offer and to rely upon for its survival. Where does that leave us?

For me, this picture says that the leadership style, content, and perspective that created and nurtured the Reform Movement since its inception will not be the same as what it needs to move it forward in these uncertain times.

As I see it, the two critical elements of leadership for these uncertain times are: (1) the will to adapt to new realities, and (2) the courage to take responsibility for inventing the future.

Adaptation is difficult because it means letting go of practices, ways of being, behaviors, and even beliefs that have previously served you well. Of course, not all of them must be left behind, but choosing which ones to abandon can be agonizing.
Taking responsibility for inventing the future is difficult, too, because it means acknowledging that, with due respect, the people in positions of authority do not have all the answers. They do not know with any certainty what the Promised Land looks like or how to take us there.

For starters, then, do not look to me or any of other so-called scholars or experts or authority figures for the answers.

Begin by looking in the mirror.

Ask yourself two questions: First, what have you done, or not done, that has contributed to the current challenges the Movement faces? I'm sure you have done lots of things that have helped, but we are all co-creators of our current realities. This means that if you are part the current reality of the Movement, then you are doing—or not doing—something that has helped to create the problems the Movement now faces.

Second, what have you been unwilling to do that might have made more progress toward the sustainability of the Movement? What are your constraints, and which of them are you willing to address in order to make more progress?

After identifying and acknowledging your role, think about what new leadership for the Movement might look like under these conditions of constant change and future uncertainty.

Let me briefly suggest six elements of what new leadership—your new leadership—might look like under these circumstances:

1. **Adapt** instead of just executing.
2. **Run experiments** instead of just solving problems.
3. **Invent new practices** instead of just searching for best practices.
4. **Orchestrate conflict** instead of just resolving it.
5. **Practice interdependence** instead of just relying on yourself.
6. **Take care of yourself** instead of just sacrificing your physical and emotional wellbeing for the cause.

I'm not suggesting you stop doing everything you've been doing and start from scratch. Rather, I'm urging you to have the courage and the will to tweak your own leadership practices, your own behaviors—wherever you are operating from, whatever role you play, and whatever your title—to address the current challenges facing the Reform Movement. There is a lot of truth in the cliché, as you've heard Jewish musician Dan Nichols sing it, “If you do what you've always done, you'll get what you've always gotten.”

The Reform Jewish Movement is full of talent. The issue is not capacity; the issue is courage and will. You can begin today.
As a new president at Kol HaNeshamah in West Seattle, a 12-year-old congregation of 135 households, I felt compelled to attend Marty Linsky’s URJ Biennial session, “Leading in Challenging Times.” One of the many lessons I learned from Linsky’s session is that leadership is a behavior and not a position. While this made perfect sense to me, it was the first time I had heard leadership expressed this way. A behavioral perspective on leadership re-framed my view with respect to my role at Kol HaNeshamah and to our collective responsibility as leaders in our communities. Leadership is more of a verb than a noun, it is an action and requires participation at all levels.

I came away from this session with a better understanding and appreciation of what “leadership as a verb” might look like at Kol HaNeshamah and how it could benefit our young community. For example, when a member is asked to take a leadership position as a chair or as a member of a committee, it means showing up. Showing up is taking action, it is the essence of “leadership as a verb.” While this might sound over-simplistic, just showing up is an essential part of being a leader. Whether a member is on a committee or has a regular volunteer commitment, when they show up, they set an example to follow. As leaders in our respective communities, we have to show up first before we can make a difference.

There was so much of what Marty had to say about leadership and organizational best practices that resonated with me. What I will bring back to our congregation from this session is a renewed faith in experimentation. We talked about the willingness and importance of framing what we do as running experiments and not solving problems. When we experiment, there is no such thing as failing. While experiments require careful monitoring, they are in large part the way organizations grow.

We experiment a lot at Kol HaNeshamah. We regularly try different approaches to Shabbat worship and also for the High Holy Days. We experiment with fund raising and with our Jewish Education programs. In some ways, it may be easier for us to try different ways to do things because we are just about to turn 13 years old and don’t have much of a legacy around tradition yet. For me, the most interesting thing that Marty had to say about experimentation was that we don’t have to be afraid to try new approaches. We should try them because like success, not hitting your mark every time is an important lesson. As leaders, being willing to experiment in order to maintain a vibrant community is an example that will benefit and encourage leadership development. Perfection, after all, is the enemy of greatness.

I would encourage anyone who is interested in leadership to find time to listen to Linsky’s Scholar Session.
Presidential Responses to Marty Linsky’s Session on Leading in Challenging Times
Pam Scheer, Temple Beth Shalom, New Albany, OH

I thought that Marty Linsky’s presentation, “Leading in Challenging Times,” turned the process of problem solving on its head. I’m always one to avoid conflict and Marty was telling me to make conflict work for me and for my congregation. He pointed to the obvious—conflict will always be present. Therefore, we should accept its existence and understand how to work with it. He also made it quite clear that the issues we face today are no different from the ones other religious or secular institutions face. We are all dealing with disruptive pressures and their ripple effects in the contemporary world.

In the modern day of congregational leadership, we are constantly confronting change; there is always a “new normal,” and there are always congregants who do not want change of any kind. To move forward, we must leave some old practices behind, and some members will mourn those losses. It’s very important for us to honor the loss that some members will feel. Therefore, we must handle change with an approach that minimizes disappointment, or at least accepts the fact that there will be disappointment, and helps one move on.

One of my favorite concepts from Linsky’s session was presenting ideas as “experiments,” as a means of relieving pressure. Through experimentation, you are testing a hypothesis in an effort to determine whether or not your hypothesis is correct. Whether your hypothesis turns out to be correct or incorrect, your experiment cannot fail, since the entire point was to test a theory out and see whether it works or not. No one ever knows if a new approach will fully work either, so adapting a mindset of experimentation and starting off by acknowledging that your ideas may not work is helpful.

As we look at our efforts to move through our congregational management, we can use each experiment as an opportunity to analyze what works and what doesn’t work. This also borrows from the scientific approach of experimentation; any experiment must be monitored and evaluated as it progresses, and mid-course corrections are an essential part of the process. We can honor the failed portions as lessons learned and incorporate the successful portions into future plans.

Marty reminded us to share our successes with the Reform movement so that other congregations can benefit from our experiences. In addition, he challenged us to take care of ourselves. If we sacrifice our own well-being for the well-being of the congregation, it’s counter-productive. We cannot bring our best to our members if we are not taking care of our own needs.

I am presenting these concepts to my co-president elect and to our current president in the near future. After that, I’d like to make a presentation to our Board of Trustees. Our congregation is in the midst of several significant changes and there will be many opportunities for both conflict management and experiments. We have had an influx of new members over the past few years and sometimes there is a sense of conflict between the old and the new. We need to serve both our long-time members, who include mostly retired or nearly retired empty-nesters, as well as families with young children, who are just embarking on their religious life. These two groups need different things from the synagogue, and some conflict naturally ensues. I am hopeful that if we use some of Marty’s wisdom, we can form a more cohesive community.
Introduction
According to Marty Linsky, we live in a world of “constant change and future uncertainty.” This is a relatively new phenomenon that requires leaders to adjust their notions of leadership and what it means to be a leader. He posits that being a leader is not about the position which one holds; rather, it is a set of behaviors that one exhibits. Linsky suggests “six elements of what new leadership… might look like”:

1. **Adapt** instead of just executing.
2. **Run experiments** instead of just solving problems.
3. **Invent new practices** instead of just searching for best practices.
4. **Orchestrate conflict** instead of just resolving it.
5. **Practice interdependence** instead of just relying on yourself.
6. **Take care of yourself** instead of just sacrificing your physical and emotional wellbeing for the cause.

This resource and its accompanying worksheets will help you explore some of these concepts and ideas.

**Big Ideas**
- Leadership in the 21st century must be different than in the past.
- Leadership is not a position; it is the behaviors we exhibit as a leader.
- Good leadership requires the ability to adapt and change regularly.

**Essential Questions**
- How can our congregational leadership and I become open to experimentation and adaptability?
- What changes do our congregational leadership and I need to make to be relevant to a 21st century constituency?
- What leadership skills and behaviors do I contribute to our congregational community?
Board Meeting—Experimentation

NOTES FOR FACILATOR

This session is based on Marty Linsky’s live teaching and Pam Scheer’s (Co-President Elect, Temple Beth Shalom, New Albany, OH) response. Both focus on the concept of “experimentation, not problem solving.”

In preparation for this discussion, you can either choose to have people listen to the highlights clip from Linsky’s live presentation and read the excerpt from Scheer’s response at home prior to the meeting, or you can present them at the beginning of the learning at the board meeting. If you choose to assign these at home, you should encourage the board members to take notes on what Linsky says, what Scheer writes, and on their own thoughts. If you choose to do it all at the meeting, you should encourage them to take the same notes. Remember that if you are listening and reading at the meeting you will need to have a system that will allow all to hear the highlights clip of Linsky’s teaching.

The activity should take approximately 30 minutes.

Materials Needed

(depending on how you choose to run the activity, you will need some, but not all, of the materials listed below):

- Computer
- Speakers
- Copies of handout
- Pens/pencils
- Copies of Scheer’s response
- Lined or blank paper for notes
- Large Post-it notes
- Index cards
- Markers
- Dot stickers

Activity

We offer you two options for this conversation: you may choose to complete the activity outlined below, or have a discussion based upon the questions below as a large group.

- Listen to the highlights clip from Linsky’s live teaching about the concept of experimentation and read Scheer’s understanding of this concept. Take notes on Linsky’s teaching, Scheer’s response, and your own thoughts regarding shifting from problem-solving to experimentation (Or, if done at home, have everyone take out their notes.)
- Break into groups of 3–5 people (depending on the size of your board). Have them respond to the questions on the handout (found below).
- Their responses to the last question should be recorded either on a large Post-it note or individual index cards.
- Post the large Post-it on the wall or put the index cards on a table. Give each person two dot stickers with the following instructions:
  - Look at all of the experiments suggested by the groups.
  - Place a dot next to the two experiments that you think might be best to try.
  - Only one dot can go on the ideas generated by your group.
• You may not put two stickers on a single idea.
• You cannot barter or give a sticker to someone else.
• After everyone has placed their dots, look to see which rose to the top. At this point you can choose a few different ways to close this conversation for the time:
  • Do a quick review of the top ideas and ask people their responses to this discussion.
  • Do a quick review of the top ideas and ask people their responses to this discussion. Let them know that a small group from the board/a task force/a committee/the executive committee and senior staff will review the ideas and come back to the board with recommendations for action.
  • Ask people for their responses to this discussion and review the top ideas. As a board, decide if you want to try this concept of experimentation. If so, choose together which experiment would be the best to try first. You should also determine who will spearhead this endeavor, set a timeline for this group to meet, and report back to the board about recommended first steps. (This will take more time than the other closings.)
Board Meeting Worksheet

This worksheet is based upon the highlights clip from Marty Linsky’s live teach about the concept of experimentation and Pam Scheer’s understanding of this concept. Take notes on Linsky’s teaching, Scheer’s response, and your own thoughts regarding shifting from problem-solving to experimentation.

Listen to the highlights clip of Linsky’s live teaching, and read Scheer’s response:

“One of my favorite concepts from Linsky’s session was presenting ideas as ‘experiments’, as a means of relieving pressure. Through experimentation, you are testing a hypothesis in an effort to determine whether or not your hypothesis is correct. Whether your hypothesis turns out to be correct or incorrect, your experiment cannot fail, since the entire point was to test a theory out and see whether it works or not. No one ever knows if a new approach will fully work either, so adapting a mindset of experimentation and starting off by acknowledging that your ideas may not work is helpful.

As we look at our efforts to move through our congregational management, we can use each experiment as an opportunity to analyze what works and what doesn’t work. This also borrows from the scientific approach of experimentation; any experiment must be monitored and evaluated as it progresses, and mid-course corrections are an essential part of the process. We can honor the failed portions as lessons learned and incorporate the successful portions into future plans.”

Pam Scheer, Co-President Elect, Temple Beth Shalom, New Albany, OH

• In general, what do you think about the concept of “experimentation, not problem solving”?

• What might be the advantages of trying this at our congregation?

• What are the challenges of trying this at our congregation?

• If we wanted to experiment with experimentation, who would need to understand this idea? How might we best engage them in this task?

• If we were to try this, what might be a good subject or project for an experiment?

• After you have discussed each other’s answers, consider what you might bring to the executive committee with your responses and discussion. Is there anything you wish to share with them and potentially act upon?
Executive Committee—Leadership As a Verb, Not a Noun

NOTES FOR FACILITATOR

In preparation for this discussion, you can have people listen to the excerpt from Marty Linsky’s full recording, which highlights the concept of leadership as a verb, and read Pat Ninburg’s piece prior to the meeting. Alternatively, you can listen to Linsky and read Ninburg’s piece when you meet.

Linsky begins his conversation about leadership by challenging the understanding of what leadership should be: rather than a noun, it should be a verb. It is the behavior that one exhibits, not the position one holds. If that is the case, it requires us to consider how we act when taking on various roles within the congregation.

This activity should take approximately 30 minutes.

Materials Needed

(depending on how you choose to run the activity, you will need some, but not all, of the materials listed below):

- Computer
- Speakers
- Copy of the excerpt from Ninburg’s response
- 2 colors of 3x3 Post-it notes
- Pens/pencils
- Copies of the worksheet
- Large Post-It notes
- Markers

Activity

We offer you two options for this conversation: use the activity below, or use the questions below for a discussion among the executive committee.

- If you have listened to and read the materials prior to the meeting, you can go right into the next step. If you have not already done so, you should begin by listening to Linsky.
- Give each person a copy of the worksheet and have them answer the questions for themselves.
- Have each person write the skills, qualities and behaviors that they have on one color of 3x3 Post-it notes. No names are necessary on these.
- On another color of 3x3 Post-it notes, have each person write the skills, qualities and behaviors they need to strengthen or cultivate. No names are necessary on these.
- As a group, share ideas of what skills, qualities and behaviors are needed as a collective to operate effectively as a leadership team. Go around the room and ask each person to list one thing that can be written on a large Post-it note for all to see. Keep going around the room until the group is done sharing ideas. No one should say something that is already listed; the purpose is just to get all of the ideas written down in a single list.
- Have each person post their notes on the wall and match those that are the same; they can be different colors, which shows how many people among the whole group possess the same qualities and how many are weaker in the same skills.
- See, as a group, which skills, qualities and behaviors are strong.
- See, as a group, in which skills, qualities and behaviors there is room for growth.
- Look at the list of skills, qualities and behaviors needed to operate effectively as a leadership team. Compare it to where your team thinks you are excelling and where there is room for growth. What are you learning?
- Discuss: What should our next steps be to continue strengthening our skills, qualities and behaviors?
Executive Committee Worksheet

Marty Linsky begins his conversation about leadership by challenging the understanding of what leadership should be: rather than a noun, it should be a verb. It is the behavior that one exhibits, rather than the position that one holds. If that is the case, it requires us to consider how we act when taking on various roles within the congregation.

Listen to the following clip from Linsky’s live session and read the excerpt from the presidential response of Pat Ninburg:

“I came away from this session with a better understanding and appreciation of what ‘leadership as a verb’ might look like at Kol HaNeshamah and how it could benefit our young community. For example, when a member is asked to take a leadership position as a chair or as a member of a committee, it means showing up. Showing up is taking action, it is the essence of ‘leadership as a verb’. While this might sound over-simplistic, just showing up is an essential part of being a leader. Whether a member is on a committee or has a regular volunteer commitment, when they show up, they set an example to follow. As leaders in our respective communities, we have to show up first before we can make a difference.”

Pat Ninburg, President, Congregation Kol HaNeshamah, Seattle, WA

• How does the shift from thinking about leadership as a role to leadership as behavior change the way I need to think about my role?

• What skills, qualities and behaviors do I exhibit that make me a good leader?

• What skills, qualities and behaviors do I need to strengthen or cultivate to make me a good leader?

• What skills, qualities and behaviors do we as a collective, the executive committee, need to have among the group to be strong leaders of our congregation?

• What are our next steps to achieve this?
Committee or Task Force Meeting—Experimentation

NOTES FOR FACILITATOR

Marty Linsky’s article and presentation recommended that we shift the focus from solving problems to running experiments in order to address the work of our congregations. Often, the work of a congregation takes place in committees and task forces where new ideas and solutions are created. The idea of experimentation is intriguing, as you can see from the excerpt below.

This activity should take approximately 30 minutes.

Materials Needed

• Copies of worksheet
• Pens/pencils
• Large Post-it paper
• Markers
• Dot stickers

Activity

We offer you two options for this conversation: use the activity below, or use the questions below for a discussion among the committee or task force.

• Distribute the worksheet to each member of the committee or task force and allow them time to answer the questions on paper.

• Come together as a large group and discuss people’s answers to the first three questions.

• List all of your experiment ideas on a large Post-it note.
  • If you are interested in doing one of these experiments, then you can give each person one dot and have them vote by putting it next to the idea that they are most interested in trying.
  • If not, this gives you some ideas to consider.

• Experiment and/or Discuss
  • If you decide that you are going to follow through with an experiment, use this time to start thinking about the process. Discuss how you will evaluate and conduct adjustments along the way.
  • If you are not going to experiment yet, the ideas generated will still be helpful with other projects. Discuss the ideas generated.
Committee or Task Force Meeting Worksheet

Marty Linsky’s article and presentation recommended that we shift the focus from solving problems to running experiments in order to address the work of our congregations. Often, the work of a congregation takes place in committees and task forces where new ideas and solutions to situations are created. The idea of experimentation is intriguing, as you can see from the excerpt below.

“What I will bring back to our congregation from this session is a renewed faith in experimentation. We talked about the willingness and importance of framing what we do as running experiments and not solving problems. When we experiment, there is no such thing as failing. While experiments require careful monitoring, they are in large part the way organizations grow.”

Pat Ninburg, President, Congregation Kol HaNeshamah, Seattle, WA

- If we were to frame our work as experiments, how would that change the way we do our work?

- What might be the challenges or risks?

- What might be the benefits?

- What are we currently working on that would be helpful to frame as an experiment?

- When you run an experiment, it is important to check things along the way to be able to make a mid-course correction. If we are to run an experiment, what are some things we will need to check/evaluate as we move ahead?
Senior Staff—Modern Challenges and the Reform Movement

NOTES FOR FACILITATOR
This worksheet is based on excerpts from Marty Linsky’s article. He addresses some challenges that the Reform Movement is facing in modern times. We are at a liminal moment in history when we need to pivot, keeping one foot rooted in our historical narrative from biblical times to now, while taking a step in a new direction. As congregational professionals, you have both the privilege and the responsibility of helping to create this transition.

This activity can be done in 30 minutes, but could possibly last longer based on the responses and interest in the conversation.

Materials Needed
• Copies of worksheet
• Pens/pencils

Activity
There are two options:
• Read the excerpts from the article and discuss the questions together.
• Read the excerpts from the article individually and use the provided handout to answer the questions independently.

After everyone is done writing their answers, have a conversation about the first five responses. When you have finished discussing these questions, answer the last question as a group.
Senior Staff Worksheet

This worksheet is based on excerpts from Marty Linsky’s article, in which he addresses some challenges that the Reform Movement is facing in modern times. We are at a liminal moment in history when we need to pivot, keeping one foot rooted in our historical narrative from biblical times to now, while taking a step in a new direction. As congregational professionals, you have both the privilege and the responsibility of helping to create this transition.

“The challenges facing Reform Judaism may feel unique, but they reflect larger forces sweeping through society… you are among the best and the brightest the Movement has to offer and to rely upon for its survival… the leadership style, content, and perspective that created and nurtured the Reform Movement since its inception will not be the same as what it needs to move it forward in these uncertain times. As I see it, the two critical elements of leadership for these uncertain times are: (1) the will to adapt to new realities, and (2) the courage to take responsibility for inventing the future. Adaptation is difficult because it means letting go of practices, ways of being, behaviors, and even beliefs that have previously served you well. Of course, not all of them must be left behind, but choosing which ones to abandon can be agonizing. Taking responsibility for inventing the future is difficult, too, because it means acknowledging that, with due respect, the people in positions of authority do not have all the answers. They do not know with any certainty what the Promised Land looks like or how to take us there. Ask yourself two questions: First, what have you done, or not done, that has contributed to the current challenges the Movement faces? I’m sure you have done lots of things that have helped, but we are all co-creators of our current realities. This means that if you are part the current reality of the Movement, then you are doing – or not doing – something that has helped to create the problems the Movement now faces. Second, what have you been unwilling to do that might have made more progress toward the sustainability of the Movement? What are your constraints, and which of them are you willing to address in order to make more progress?”

Marty Linsky, Faculty, Harvard Kennedy School and Co-Founder, Cambridge Leadership Associates

• What have I done that has contributed to the current challenges the Reform Movement faces?

• What have I not done that has contributed to the current challenges the Reform Movement faces?

• What have I been unwilling to do that could have helped the Reform Movement make progress toward sustainability?

• What are my constraints, and which of them am I willing to address in order to make more progress?

• What do I need to do to help our congregants move toward a new Reform Movement, one that is pivoting into a new direction based on our new reality?
Executive Committee and Senior Staff—Facing an Uncertain Path

NOTES FOR FACILITATOR

This discussion and/or activity is based on excerpts from the pieces by Pam Scheer and Marty Linsky. We face an uncertain path in the future, yet we need to claim our personal path as our destiny. This statement is also fraught with many “landmines” or “pitfalls.” Changing course brings discord with those who are satisfied with the status quo. Even if people are dissatisfied with the status quo, they may not be ready to relinquish that which they like and connect with, even if it would bring about the best resolution.

This activity can be done in 30 minutes, but it could also be the basis of a much longer discussion.

Materials Needed

- Copies of worksheet
- Large Post-it paper
- Markers
- Pens/pencils
- Dots

Activity

Two options:

- Read the two excerpts as a group and discuss the questions and sentence completions.
  - On large Post-it paper, list the ideas for changes or adaptations that you found compelling from the two statements.
  - As a group, choose and delve into one idea for change or adaptation. Have an in-depth discussion about how you would create that change or adaptation:
    - What could be the positive impact of this change or adaptation for your congregation?
    - How are you going to address the anger, conflict and loss that might arise from this change or adaptation?
    - What would be the first steps you would need to take?
- Independently read the two excerpts and write your responses on the worksheet provided.
  - After each person is done responding, they should write their ideas for changes or adaptations on a large Post-it paper.
  - After everyone has written an idea, check whether any ideas were written more than once. Cross out the multiple entries (leave the one that is most articulately written), so that only unique ideas remain.
  - Give each person 2 sticker dots. They must put them on the two ideas that they would most like to consider for the congregation. They can put only one sticker per idea but can put a sticker on their own idea if they want. No bartering and no giving a sticker to someone else.
  - Identify which idea had the greatest interest.
    - Discuss what the positive impact could be for the congregation.
    - How are you going to address the anger, conflict and loss that might arise from this change or adaptation?
    - What would be the first steps you would need to take to begin making this change or adaptation?
Executive Committee and Senior Staff Worksheet

“I thought that Marty Linsky’s presentation, ‘Leading in Challenging Times,’ turned the process of problem solving on its head. I’m always one to avoid conflict and Marty was telling me to make conflict work for me and for my congregation. He pointed to the obvious- conflict will always be present. Therefore, we should accept its existence and understand how to work with it. He also made it quite clear that the issues we face today are no different from the ones other religious or secular institutions face. We are all dealing with disruptive pressures and their ripple effects in the contemporary world.

In the modern day of congregational leadership, we are constantly confronting change; there is always a ‘new normal,’ and there are always congregants who do not want change of any kind. To move forward, we must leave some old practices behind, and some members will mourn those losses. It’s very important for us to honor the loss that some members will feel. Therefore, we must handle change with an approach that minimizes disappointment, or at least accepts the fact that there will be disappointment and helps one move on.”

Pam Scheer, Co-President Elect, Temple Beth Shalom, New Albany, OH

“As I see it, the two critical elements of leadership for these uncertain times are: (1) the will to adapt to new realities, and (2) the courage to take responsibility for inventing the future.

Adaptation is difficult because it means letting go of practices, ways of being, behaviors, and even beliefs that have previously served you well. Of course, not all of them must be left behind, but choosing which ones to abandon can be agonizing.

Taking responsibility for inventing the future is difficult, too, because it means acknowledging that, with due respect, the people in positions of authority do not have all the answers. They do not know with any certainty what the Promised Land looks like or how to take us there.”

Marty Linsky, Faculty, Harvard Kennedy School and Co-Founder, Cambridge Leadership Associates

• What is the most compelling idea from these statements?

• How well do you handle conflict?

• What do you do when there is conflict at the congregation?
“The Talmud says…”

Rabbis, teachers, and scholars alike often utter this misnomer. The next time your rabbi utters these words, please resist the temptation to interrupt her (although a silent smirk may do the trick).

You see, we are the heirs to not one but two Talmuds—the Bavli and the Yerushalmi, symbols of the vibrant communities in Palestine and in Babylonia in Talmudic times. It is clear that these two communities lived in some tension with one another, at times disagreeing on matters of law, culture, and practice. But they also shared wisdom, teachings, and rulings with each other.

The key to the exchange was the Nechutei, travelers who would go back and forth between Bavel and Eretz Yisrael bringing queries on behalf of their own community’s scholars and leaders for their foreign counterparts to answer; they also gathered the wisdom of the other community’s sages to bring home for the enrichment of their teachers and colleagues.

The result? While we still have two Talmuds, they—and the communities that produced them—were both richer for having collaborated on the intellectual and spiritual project of refining Jewish law and lore.

Collaboration is a current buzzword in Jewish life, and while its connotations are largely positive, it is seldom practiced effectively.

Why don’t congregations usually collaborate? Why should they? And how can leaders of congregations learn to collaborate well?

Congregations don’t typically collaborate because our institutions are not built to collaborate. The structure and the culture of synagogues promote competition: Potential members go “synagogue shopping” and ultimately pay dues and contribute to the viability of one synagogue over all the others. Given that reality, rabbis and synagogue leaders
understandably have their identities and egos (to say nothing of their budgets and salaries) tied up in the notion of being “better” and more attractive than other synagogues.

These dynamics are only deepened by the changing demographics of our community. The resources—members, revenue, energy, and prestige—are getting scarcer. Increasingly, the pressure to stand out from other congregations looks less like a healthy market indicator and more like an existential threat.

The natural response to that pressure is to hoard resources and redouble efforts to circle the wagons and preserve what you have.

So we have a double challenge—and a high bar to get over if collaboration is to win the day.

In response to the cultural and structural barriers we’ve inherited, I’d suggest that collaboration is an inherent good. As the Nechutei helped make both Talmuds richer texts (and both Jerusalem and Babylon stronger communities), so too can collaboration strengthen all congregations and communities. The diversity of ideas and perspectives it offers, as well as the scale that is possible with multiple stakeholders, are ingredients for a richer Jewish stew.

If collaboration is not self-evident as a greater good—or if that idea is accepted in principle but obscured in practice—the demographic reality now makes it a necessary tool for creative survival. Remaining siloed and in competition will hurt almost every congregation and our broader community. Some will simply not survive.

That’s the why. But even if we accept that we should collaborate, the question of how to do it effectively is crucial—and not simple. A few principles can guide us:

- Check personal and institutional egos at the door.
- Stick with it! Real collaboration takes time.
- Take risks. Playing it safe usually leads nowhere.
- Recognize that collaboration involves loss. Be prepared to incur losses of autonomy, familiarity, and more—and help others deal with their losses, too.

The sages of ancient Jerusalem and Babylonia could not have foreseen that they were creating a culture that would guide our people through the next two millennia. They were just seeking truth and trying to lead their people through the next day, the next Shabbat, the next year. But they couldn't do it alone; they needed the Nechutei to broaden their thinking and connect them to larger possibilities.

The 21st century North American Jewish community needs Nechutei, too—bridge-builders who see the value of collaboration and help make it possible. Dare to be a Nechutei for your community—and maybe the Jews of the year 4015/7776 will be studying about you!
The Scholar Session by Rabbi Jay Moses emphasized a very important notion to those of us who are trying to change the culture of our synagogues; collaboration can no longer be seen as something we only do internally. We must continuously look for ways to expand our reach into our communities, as the number of unaffiliated individuals and families continues to grow. As a part of this effort, we need to have open communications with the other synagogues in our area.

Our congregation is acting on this notion; for years, our congregation and our sister congregation (located 6 miles away) have both seen a reduction in attendance for second day festival services. This coming year, we have decided to rotate these services between the two congregations. Both congregations will share these services and pray as one community, thus reducing the costs involved to each of us.

While the focus of Moses’ session was external collaboration, we do need to continue collaborating and experimenting internally. At the root of it, it means that we need to look at issues from different angles, and not just assume that because something didn’t work in the past, we shouldn’t try it again. We need to identify what the issues were that caused it to fail, and look for ways to ensure that they won’t happen again. These are important discussions to have with our boards of trustees.

Our congregation had to work collaboratively this year as we made the difficult decision to move to a voluntary dues structure for all new members. The work we put in required a high level of teamwork, which crossed several committees. Our committees and board were faced with the task of examining their different points of view and looking at how this would affect the community as a whole.

Rabbi Moses shared positive goals for collaboration, as well as wrong reasons to collaborate:

- Don’t collaborate for the sake of collaboration
- Don’t collaborate to attract funding
- Don’t collaborate to appease (we must be sensitive of the feelings of our congregants. However, we cannot let the squeaky wheel drive the bus)

*Do* collaborate:

- To achieve better results
- To utilize resources more efficiently
- To capitalize on different strengths
- To create an environment where innovation thrives
- To make Judaism more attractive
- To create a more accessible Jewish community
- To raise all boats with the tide
As a congregational leader, when I look at this list, the most difficult goal seems to be creating an environment where innovation can thrive. When I first became president, I asked our board and committee chairs to avoid saying, “We did that and it didn’t work, so we shouldn’t do it again!” We are living in a time in which we have the most generations working and involved in synagogue leadership that we have ever had. Co-workers from different generations are constantly struggling to communicate with one another. Despite the fact that it is challenging, it is precisely this communication gap that makes collaboration more important. By collaborating, we can build on the traditions of the past while keeping our eye to the future, and thus better meet the needs of all of our congregants.

Making a culture shift is never easy. However, it is necessary if our congregations are going to be sustainable for years to come. Collaboration and the ability to look both internally and also outside our walls are the keys to long term success. We cannot look at our sister congregations as competition; we must look for ways to work together for the better good of the entire Jewish community. The ability to collaborate is a key competency for anyone leading us into a thriving Jewish future.
Presidential Responses to Rabbi Jay Moses’ Session on Collaboration
Donna Thalblum, The Temple, Congregation B’nai Jehudah, Overland Park, KS

One of the most inspiring thoughts in Rabbi Jay Moses’ learning session can be found in the title- “Collaboration Won’t Kill Us, but Failing to Collaborate Might.” Collaboration is key due to the change occurring within the Jewish community. Acknowledging change and setting aside our own self-interest is paramount to successful collaboration.

There are many good reasons to collaborate. However, Rabbi Moses focused initially on the wrong reasons to collaborate. Do not collaborate for collaboration’s sake. Do not collaborate for good public relations. Do not collaborate to attract funding, and do not collaborate to appease others. These goals will not lead to successful collaboration.

Organizations should consider collaboration in order to achieve better results and in order to utilize scarce resources more efficiently.

Once the parties agree on these worthy goals, there are still challenges to collaboration. Organizations tend to hoard scarce resources. Their institutional egos see no need for collaboration, or fail to accept that collaboration will make the organization both better and stronger. Often, organizations also do not have a clear vision of what collaboration would look like. They do not have a vision beyond the institutional goals. The players involved are also challenged by the amount of problem solving required in any successful collaboration. Can the parties afford the staff, or the loss of staff? Are people willing to go beyond the walls of the synagogue? Finally, organizations need to face the fact that collaboration always involves loss, either in income or uniqueness. Rabbi Moses defines a good leader as someone who delivers loss at a rate people can tolerate. This requires trust and transparency.

Rabbi Moses articulated six guiding principles when beginning a collaborative process.

- Believe it is necessary. In fact, he believes that without this sense of necessity, collaborative efforts are more likely to fail.
- Believe it is possible.
- Check institutional ego at the door. Be willing to be vulnerable.
- Grit. Be willing to stick with the process when it gets tough.
- Have at least one courageous leader who can help others see the value of collaboration.
- Believe the collaborative effort will be rewarded with self-preservation, a better shared future, and a healthier Jewish community.

Our congregation has approached or been approached by other congregations in our area over the years with collaborative opportunities. Thanks to Rabbi Moses’ presentation, I now see why none of them were successful. I am going to share this session with my officers and our rabbinic staff. Perhaps it is the right time to try again, although it might be difficult now, when the necessity to collaborate is not apparent. As opposed to some of our neighboring congregations, we are doing well right now. So, it feels a bit like we have more institutional ego to surrender than others. However, I believe, as does our senior rabbi, that collaboration is in our future. I therefore hope that this learning will enable us to prioritize collaboration. I am particularly interested in sharing the possibility of collaborating on religious education. The suggestion Rabbi Moses offered of making each institution a specialist in one phase of education was exciting. For example, it would be interesting to make one facility responsible for early childhood education, one facility for the elementary grades, one for middle school grades, and one for high school or confirmation. I will be sharing this idea with our education task force that is currently examining our entire religious education process.

I appreciate the opportunity to both attend and participate in this session.
Rabbi Jay Moses is sounding an alarm. The changing demographics of our communities require us to recognize a new reality. “Waiting lists” to join congregations have disappeared and our “resources—members, revenue, energy and prestige—are getting scarcer.” While congregations have long believed that they must compete to survive and thrive, Rabbi Moses is challenging us to rethink this strategy. He asks “Why don’t congregations usually collaborate? Why should they? And how can leaders of congregations learn to collaborate well?”

Rabbi Moses observes that in today’s Jewish world, few congregations have adopted partnerships for their mutual benefit. They are being held back by the culture of competition and the ego that comes with success. During the decades of growing membership, collaboration around mutual goals was rare and often limited to small congregations or one-off events. Even today, most congregations still compete with each other for new members, and the resources and energy that those members bring with them. Their messages focus on the unique qualities that set them apart, not the (few) programs and activities that they build and share together.

Moses’ hypothesis is that the declining resources and changing attitudes of the 21st century demand cooperation and collaboration to achieve a healthy future for the larger Jewish community. However, he warns that changing a culture of competition to one of partnership does not come easy.

**Big Ideas**
- The culture of the majority of congregations is to compete, not to collaborate.
- Our resources, members, revenue and volunteers are becoming scarcer.
- We need to believe collaboration is necessary and possible.

**Essential Questions**
- Collaboration is generally applauded in principle. Why don’t we collaborate?
- Why should we collaborate?
- What are the obstacles to collaboration?
- How do we develop a mindset that embraces collaboration?
Board Meeting—Collaboration and Identity

NOTES FOR FACILITATOR

There is preparation necessary for the discussion about Rabbi Moses’ hypothesis and challenge. Share the “Introduction to the Collaboration Study Guide,” listen to the highlights clip from Rabbi Moses’ learning session, and read his full article.

Collaboration requires a congregation to understand what is unique about its community. When seeking to collaborate with another congregation or institution, you must be able to articulate what you bring to the table that adds strength to the partnership. Working in partnership to collaborate also requires the ability to change the status quo of how things are done. None of this is simple, but opening the conversation is an important first step in the process.

This activity should take approximately 45 minutes.

Materials Needed

- Copies of the worksheet
- Large flip chart or large Post-it notes
- Markers

Activity

- Begin with a reading of the following introduction to the group:

  Rabbi Moses begins with the observation that the Jewish world is changing and that we must learn to live with declining membership and fewer resources. If we accept his proposition, we are then challenged with thinking about whether our congregational model will still work.

  Today, lay and professional leaders invest a great deal of energy and resources in building a unique institutional identity that sets congregations apart in a crowded field. Often, leaders enjoy an institutional ego that follows their success. Rabbi Moses acknowledges that it is hard to let go, and compromise or lose the unique qualities that a congregation has worked so hard to build and has valued for so long. That being said, Rabbi Moses contends that leadership must get past the fear of compromise and loss in order to begin the very important discussion about the value of collaboration and what it could look like. He proposes adopting the following principles to begin a constructive conversation about collaboration:

    “Check personal and institutional egos at the door.”

    “Stick with it! Real collaboration takes time.”

    “Take risks. Playing it safe usually leads nowhere.”

    “Recognize that collaboration involves loss. Be prepared to incur losses of autonomy, familiarity, and more—and help others deal with their losses too.”

- Distribute the Board Meeting Worksheet and read the excerpt of the presidential response written by Donna Thalblum of The Temple, Congregation B’nai Jehudah in Overland Park, KS, which discusses the challenges in your congregation that would need to be overcome to achieve successful collaboration.

- Break into groups of 4-6 people and discuss the four questions about institutional identity found following Thalblum’s remarks. Supply each group with a flip chart or large Post-it notes and marker and ask for a volunteer to act as scribe. (15 minutes)
• Come together as a large group and have each group share one or two insights that they had from their conversation. It is also important to talk about a related issue of loss in a more concrete sense: collaboration may result in shared or reduced staff. It may involve sharing your space or venturing out to share someone else’s space. It may also result in the loss of control of programs and staff.

• In the same 4-6 person groups already created, continue your discussion of Thalblum’s response (15 minutes).

• After the 15 minutes, tell the small groups to take a few minutes to read the excerpt of the presidential response written by Steve Feinstein of Temple Beth Orr of Coral Springs, FL, on the importance of collaboration to the future of his community and discuss the question. (5 minutes)

• Reassemble as a full group and ask each group share their most persuasive reasons to recommend exploring collaboration to your community (10 minutes).
Rabbi Moses begins with the observation that the Jewish world is changing and that we must learn to live with declining membership and fewer resources. If we accept his proposition, we are then challenged with thinking about whether our congregational model will still work.

Today, our lay and professional leaders invest a great deal of energy and resources in building a unique institutional identity that sets their congregation apart in a crowded field. Often, our leaders enjoy an institutional ego that follows their success. Rabbi Moses acknowledges that it is hard to let go, and compromise or lose the unique qualities that you have worked so hard to build and have valued for so long. That being said, Rabbi Moses contends that leadership must get past its fear of compromise and loss in order to begin the very important discussion about the value of collaboration and what it could look like. He proposes adopting the following principles to begin a constructive conversation about collaboration:

“Check personal and institutional egos at the door.”

“Stick with it! Real collaboration takes time.”

“Take risks. Playing it safe usually leads nowhere.”

“Recognize that collaboration involves loss. Be prepared to incur losses of autonomy, familiarity, and more – and help others deal with their losses too.”

Donna Thalblum responds to his proposal as follows:

“Organizations should consider collaboration in order to achieve better results and in order to utilize scarce resources more efficiently.

Once the parties agree on these worthy goals, there are still challenges to collaboration. Organizations tend to hoard scarce resources. Their institutional egos see no need for collaboration, or fail to accept that collaboration will make the organization both better and stronger. Often, organizations also do not have a clear vision of what collaboration would look like. They do not have a vision beyond the institutional goals. The players involved are also challenged by the amount of problem solving required in any successful collaboration. Can the parties afford the staff, or the loss of staff? Are people willing to go beyond the walls of the synagogue? Finally, organizations need to face the fact that collaboration always involves loss, either in income or uniqueness. Rabbi Moses defines a good leader as someone who delivers loss at a rate people can tolerate. This requires trust and transparency.

Our congregation has approached or been approached by other congregations in our area over the years with collaborative opportunities. Thanks to Rabbi Moses’ presentation, I now see why none of them were successful. I am going to share this session with my officers and our rabbinic staff. Perhaps it is the right time to try again, although it might be difficult now, when the necessity to collaborate is not apparent. As opposed to some of our neighboring congregations, we are doing well right now. So, it feels a bit like we have more institutional ego to surrender than others. However, I believe, as does our senior rabbi, that collaboration is in our future. I therefore hope that this learning will enable us to prioritize collaboration. I am particularly interested in sharing the possibility of collaborating on religious education. The suggestion Rabbi Moses offered of making each institution a specialist in one phase of education was exciting. For example, it would be interested to make one facility responsible for early childhood education, one facility for the elementary grades, one for middle school grades, and one for high school or confirmation. I will be sharing this idea with our education task force that is currently examining our entire religious education process.”

Donna Thalblum, The Temple, Congregation B’ni Jehudah, Overland Park, KS
• How would you describe the qualities that make our congregation unique and special? Please ask your volunteer scribe to list each quality on one page of the flip chart.

• How do you think our unique identity might change as a result of collaboration? Return to the qualities just listed and indicate whether each quality would remain unchanged, strengthen or weaken by collaboration, by adding: =, + or – next to the quality.

• Do you think the congregation is prepared to accept change to achieve collaboration? Why or why not?

• How could institutional ego inhibit lay and professional willingness to collaborate?

Return to large group for debrief.

• Who could be our partner in a collaboration in our community? Please ask your volunteer scribe to list the congregations and/or organizations with whom you could imagine some sort of collaboration.

• On a separate page create a list of the programs or services that you might consider partnering with another congregation or communal agency.

• For the purpose of this exercise, imagine a collaboration to provide food to persons in need through a community-wide food bank:
  • What might it look like? How would it be organized?
  • What would be the benefits? What would be the loss or sacrifice to our congregation if you partner with other organizations in this effort?
  • Make a page with one column labeled “benefits” and the second column “losses” and list each in the appropriate column.

“Making a culture shift is never easy. However, it is necessary if our congregations are going to be sustainable for years to come. Collaboration and the ability to look both internally and also outside our walls are the keys to long term success. We cannot look at our sister congregations as competition; we must look for ways to work together for the better good of the entire Jewish community. The ability to collaborate is a key competency for anyone leading us into a thriving Jewish future.”

  Steve Feinstein, Temple Beth Orr, Coral Springs, FL

What benefits of collaboration do you think would be most persuasive in motivating our congregation to support a new collaborative partnership in our community?
Executive Committee—Different Reasons for Collaboration

NOTES FOR FACILITATOR

There is preparation necessary for the discussion about Rabbi Moses’ hypothesis and challenge. Share the “Introduction to the Collaboration Study Guide,” listen to the highlights clip from Rabbi Moses' learning session, and read his full article.

Almost everyone is feeling the pinch of scarce resources—human and financial. Collaboration allows congregations and institutions to leverage the resources of each community and capitalize on each other’s strengths for efficiency and maximum impact. Then it is incumbent to determine what the first steps could or should be to make it a reality.

This activity should take approximately 60 minutes.

Materials Needed

• Large Flip Chart or Large Post-it notes
• Markers

Activity

• Begin by reading this introduction to the group:

Imagine that Rabbi Moses has you from the outset, and you believe that collaboration will be a net gain for your community and all partners in the collaboration. You are a leader of your congregation, and now you are a pioneer with few successful models to look to for guidance. You are being challenged to imagine a completely new operational strategy.

How do you begin? Perhaps you should start with a discussion about the benefits of collaboration, and follow it with a laboratory of innovative thinking!

You are ready to embrace the challenge, and agree to adopt the behavioral traits recommended by Rabbi Moses for a constructive conversation about collaboration:

“Check personal and institutional egos at the door,”

“Stick with it! Real collaboration takes time,”

“Take risks. Playing it safe usually leads nowhere,”

“Recognize that collaboration involves loss. Be prepared to incur losses of autonomy, familiarity, and more—and help others deal with their losses too.”

If your group has eight members or more, divide the participants into 2 groups of equal size and distribute the worksheet provided. Supply the/each group with a flip chart and marker, and ask for a volunteer to act as scribe. Otherwise, remain together for the activity and the leader can ask the questions without the use of the worksheet.

One obvious reason to collaborate is to utilize scarce resources more efficiently, with greater effect, and with maximum impact. (15 minutes)

• Identify specific resources (human or material) that are in limited supply and of great value to our congregation which would benefit the wider community in a collaborative program.
  • List each of these scarce resources on a page of the flip chart or on a large Post-it note.
  • After you have completed your list, think of collaborative ways that you would imagine sharing them.
• Do we have a wish list of resources currently unavailable to our congregation that our congregants would enjoy and appreciate, and which would benefit the congregation?
  • List those special resources that you feel are missing on a new page.
  • Are these resources available in other congregations or organizations in the community? Can we imagine reaching out to one of them to begin a conversation about collaboration?

• How would we make a case for mutual benefit for us and the organizations with whom we might collaborate?
  • Who would we contact to open the conversation about possible collaboration? (Rabbi, President, Board member?)

**Another reason to collaborate is to capitalize on different strengths.** (15 minutes)

• Does our congregation have special strengths or programs that we believe are unique within our community?
  • List each of our special strengths that are not generally found within other congregations or organizations in our community.
  • How might we imagine sharing these special strengths in a collaborative event or program?
• Can we identify areas of Jewish programming where our congregation does not excel?
  • List each area that we would like to strengthen or improve.
  • Would we consider a collaboration with another congregation or organization that has demonstrated particular strength in one of these areas?
  • How would we begin a conversation about collaboration and make a case for mutual benefit?

**What it takes to make it happen** (30 minutes):

In the first two exercises we are either sharing our resources or strengths, or are expressing interest in the sharing of resources or strengths of others. Creating a culture of collaboration could benefit members of all congregations or organizations, (in Rabbi Moses’ words, “raising all boats with the tide”) and lead to a better shared future.

• Choose one idea listed and let’s begin to think about 1st steps:
  • What are the greatest benefits to us and what might be the greatest benefits for the other congregation/organization?
  • How would we begin a conversation?
  • Who are the stakeholders who need to be informed and/or brought in?
  • Who reaches out? The Rabbi, the President? Board member?
  • To whom do we reach out to begin?
  • What might be the next steps to ensure potential success?
• If you are in more than one group, use the remaining time, if any, to reassemble as a full group and share your responses to this final activity.
Imagine that Rabbi Moses has you from the outset, and you believe that collaboration will be a net gain for your community and all partners in the collaboration. You are a leader of your congregation, and now you are a pioneer with few successful models to look to for guidance. You are being challenged to imagine a completely new operational strategy. How do you begin? Perhaps you should start with a discussion about the benefits of collaboration, and follow it with a laboratory of innovative thinking!

You are ready to embrace the challenge, and agree to adopt the behavioral traits recommended by Rabbi Moses for a constructive conversation about collaboration:

- “Check personal and institutional egos at the door,”
- “Stick with it! Real collaboration takes time,”
- “Take risks. Playing it safe usually leads nowhere,”
- “Recognize that collaboration involves loss. Be prepared to incur losses of autonomy, familiarity, and more—and help others deal with their losses too.”

**One obvious reason to collaborate is to utilize scarce resources more efficiently, with greater effect and with maximum impact.**

- Identify specific resources (human or material) that are in limited supply and of great value to our congregation which would benefit the wider community in a collaborative program.
  - List each of these scarce resources on a page of the flip chart or on a large Post-it note.
- After you have completed your list, add how you would imagine sharing them in a collaborative way.
- Do we have a wish list of resources currently unavailable to our congregation that our congregants would enjoy and appreciate, and which would benefit the congregation?
  - List those special resources that you feel are missing on a new page.
- Are these resources available in other congregations or organizations in the community? Can we imagine reaching out to one of them to begin a conversation about collaboration?
- How would we make a case for mutual benefit for us and the organizations with whom we might collaborate?
- Who would we contact to open the conversation about possible collaboration? (Rabbi, President, Board member?)
Another reason to collaborate is to capitalize on different strengths.

- Does our congregation have special strengths or programs that we believe are unique within our community?
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What it takes to make collaboration happen

In the first two exercises we are either sharing our resources or strengths, or are expressing interest in the sharing of resources or strengths of others. Creating a culture of collaboration could benefit members of all congregations or organizations, (in Rabbi Moses’ words, “raising all boats with the tide”) and lead to a better shared future.

- Choose one idea listed and let’s begin to think about 1st steps:
  - What are the greatest benefits to us and what might be the greatest benefits for the other congregation/organization?

- How would we begin a conversation?

- Who are the stakeholders who need to be informed and/or brought in?

- Who reaches out? The Rabbi? The President? Board member?

- To whom do we reach out to begin?

- What might be the next steps to ensure potential success?
Committee/Task Force Members—Imagining Collaboration

NOTES FOR FACILITATOR

There is preparation necessary for the discussion about Rabbi Moses’ hypothesis and challenge. Share the “Introduction to the Collaboration Study Guide,” listen to the highlights clip from Rabbi Moses’ learning session, and read his full article.

Committee and task force volunteers are traditionally asked to focus on specific deliverables within their community. The religious school committee generally observes and evaluates the quality of the school program and recommends changes in the curriculum. The worship committee partners with the clergy to organize holiday activities and acts as a sounding board for changes in ritual. The governance task force studies trends in best practices in governance and often recommends changes to the bylaws. The fundraising task force plans the annual fundraiser and manages the logistics for the event. The social action committee plans, organizes and participates in social action events and activities for the congregation.

For the purpose of this exercise, the terms “committee” and “task force” are interchangeable. Each usually serves at the direction of the board and its responsibilities relate to programs, services and activities intended for the benefit of the congregation. The chair and members of each will often use their own judgment in decision-making and execution of their responsibilities, but will look to precedent within the congregation.

This activity should take approximately 40 minutes.

Materials Needed

- Large Flip Chart or Large Post-it notes
- Markers

Activity

- Read the following to the group (If needed, you can also read Steve’s full presidential response):
  
  As lay volunteers, Rabbi Moses wants us to think about the work of our committee/task force in the context of collaboration. He challenges us to think beyond the simple formula of repeating past practices.
  
  This exercise is our opportunity to imagine a collaboration with another congregation or organization that would achieve our goals and their goals, with improved efficiency and the benefit of new and different ideas.

- Distribute the worksheet. If your committee has eight members or more, please divide into 2 groups of equal size. Supply each group with a flip chart and marker and ask for a volunteer to act as scribe. Otherwise, remain together for the activity.

Examining Big Questions about Collaboration (15 minutes):

Read the two texts on the worksheet and answer the three questions below. Be sure to have someone serve as the scribe to write the responses on the flip chart paper. Use a different page for each question.
Reimagining a Program (25 minutes)

The board has just challenged us to reimagine one of our existing programs or events as a collaborative partnership with another congregation or organization in our community.

• Begin by listing all major activities managed by your committee.
• Choose one activity that could lend itself to a collaboration with another congregation or organization.
• In bullet points, list the ways in which you would collaborate and how the program might change.
  • How will the collaboration strengthen the activity for each of the partner congregations or organizations?
  • Are there aspects of the collaboration that could dilute or weaken the activity?
  • What new opportunities would the collaborative program provide to the congregation and, separately, to its members?
  • Could such a collaboration be perceived as a threat to an individual community?
• Discuss: How can leaders of our congregation learn to collaborate well?
Committee/Task Force Worksheet

Rabbi Jay Moses is sounding an alarm. The changing demographics of our communities requires us to recognize a new reality. “Waiting lists” to join congregations have disappeared and our “resources—members, revenue, energy and prestige—are getting scarcer.” While congregations have long believed that they must compete to survive and thrive, Rabbi Moses is challenging us to rethink this strategy. He asks “Why don’t congregations usually collaborate? Why should they? And how can leaders of congregations learn to collaborate well?”

Rabbi Moses observes that, in today’s Jewish world, few congregations have adopted partnerships for their mutual benefit. They are being held back by the culture of competition and the ego that comes with success. During the decades of growing membership, collaboration around mutual goals was rare and often limited to small congregations or one-off events. Even today, most congregations still compete with each other for new members, and the resources and energy that those members bring with them. Their messages focus on the unique qualities that set them apart, not the (few) programs and activities that they build and share together.

His hypothesis is that the declining resources and changing attitudes of the 21st century demand cooperation and collaboration to achieve a healthy future for the larger Jewish community. However, he warns that changing a culture of competition to one of partnership does not come easy.

“Making a culture shift is never easy. However, it is necessary if our congregations are going to be sustainable for years to come. Collaboration and the ability to look both internally and also outside our walls are the keys to long term success. We cannot look at our sister congregations as competition; we must look for ways to work together for the better good of the entire Jewish community. The ability to collaborate is a key competency for anyone leading us into a thriving Jewish future.”


Steve Feinstein, Temple Beth Orr, Coral Springs, FL

• Collaboration is generally applauded in principle. Why don’t we collaborate?

• Why should we collaborate? How would we benefit?

• What do you see as obstacles to collaboration?
Senior Staff—Designing A Collaborative Programmatic Model

NOTES FOR FACILITATOR

There is preparation necessary for the discussion about Rabbi Moses’ hypothesis and challenge. Share the “Introduction to the Collaboration Study Guide,” listen to the highlights clip from Rabbi Moses’ learning session, and read his full article.

Collaboration is critical but never simple. Each congregation/institution has a particular outcome they are seeking when initially working together. To encourage you and your congregation to consider what might be the advantages and pitfalls of collaboration this exercise asks you, the senior staff, to do a SWOT analysis of a possible collaboration. Through this you will begin to see how collaboration would benefit the congregation, some of the potential risks or roadblocks and the opportunities it creates to be bold in thinking about the future.

This activity should take approximately 40 minutes.

Materials Needed

• Large flip chart or Large Post-it notes
• Markers

Activity

SWOT Analysis: (30 minutes)

• Distribute the worksheet to the group and read the text.

• The board is asking you to design an early childhood program with one or more congregations/organizations that would capitalize on the strengths of each, would be geographically accessible to members of each congregation/organization, and would provide a meaningful improvement in quality to the existing program. Discuss alternative models that you could bring to the board. Have someone take notes to keep the thoughts and ideas organized.

• Choose one idea to work with for the next part of the exercise. Using the chosen model, do a modified SWOT analysis:
  • The strengths/benefits to the members of each congregation/organization
  • The weaknesses/losses that individual congregations/organizations may fear
  • The opportunities that a collaborative program would provide to our congregation and members
  • Possible threats our community

Be sure to capture all of the comments made during the analysis.

Debrief (10 minutes)

• What have we learned about the value of collaboration for our congregation?
• What obstacles have we enumerated that we had never considered before?
• If we wish to collaborate on anything with another congregation/organization in our community, what are some of the first steps needed to help ensure success?
Introduction

Rabbi Jay Moses is sounding an alarm. The changing demographics of our communities requires us to recognize a new reality. “Waiting lists” to join congregations have disappeared and our “resources—members, revenue, energy and prestige—are getting scarcer.” While congregations have long believed that they must compete to survive and thrive, Rabbi Moses is challenging us to rethink this strategy. He asks, “Why don’t congregations usually collaborate? Why should they? And how can leaders of congregations learn to collaborate well?”

Rabbi Moses observes that, in today’s Jewish world, few congregations have adopted partnerships for their mutual benefit. They are being held back by the culture of competition and the ego that comes with success. During the decades of growing membership, collaboration around mutual goals was rare and often limited to small congregations or one-off events. Even today, most congregations still compete with each other for new members, and the resources and energy that those members bring with them. Their messages focus on the unique qualities that set them apart, not the (few) programs and activities that they build and share together.

His hypothesis is that the declining resources and changing attitudes of the 21st century demand cooperation and collaboration to achieve a healthy future for the larger Jewish community. However, he warns that changing a culture of competition to one of partnership does not come easy.

Often, our professional leaders are encouraged to build a unique institutional identity that sets their program apart in a crowded field. As a result, those same professional leaders develop institutional egos that follow the success of their programs. Rabbi Moses acknowledges that it’s hard to let go and to compromise, or lose the special or unique qualities that you have worked so hard to build and have valued for so long. But Rabbi Moses contends that leadership must get beyond its fear of compromise and loss in order to begin the very important discussion of what collaboration would look like and how it could benefit the congregation. He proposes adopting the following principles to begin a constructive conversation about collaboration:

“Check personal and institutional egos at the door.”

“Stick with it! Real collaboration takes time.”

“Take risks. Playing it safe usually leads nowhere.”

“Recognize that collaboration involves loss. Be prepared to incur losses of autonomy, familiarity, and more—and help others deal with their losses too.”

Rabbi Moses makes a compelling argument for the benefit of collaboration to our individual congregations and the larger community. One obvious benefit would be that all partners could utilize scarce resources more efficiently, with greater effect and with greater impact. A second would be the opportunity for members of all congregations/organizations to enjoy the special strengths of each partner.

Rabbi Moses also sees a long term benefit to the larger Jewish community. Creating a culture of collaboration could benefit members of all congregations (in Rabbi Moses’ words, “raising all boats with the tide”) and leading all of us to a better shared future.

Imagine that your congregation has enjoyed modest growth and financial stability for the last several years, and your congregation just returned from a retreat with Rabbi Moses as the Scholar in Residence. While he commended the congregation’s success, he warned of an uncertain future for all congregations and challenged your leadership to embrace a mindset that would welcome joint activities with others in your community. Your board heard Rabbi Moses’ sober assessment of the future and was motivated to take the lead in creating opportunities for collaboration.

The board turned to you, the senior staff, to imagine what collaboration in your community could look like.
**Our Challenge**

The board is asking you to design an early childhood program with one or more congregations/organizations that would capitalize on the strengths of each, would be geographically accessible to members of each congregation/organization, and would provide a meaningful improvement in quality to the existing program. Discuss alternative models that you could bring to the board. Have someone take notes to keep the thoughts and ideas organized.

Choose one idea to work with for the next part of the exercise. Using the chosen model, do a modified SWOT analysis:

- **The strengths/ benefits to the members of each congregation/organization**

- **The weaknesses/losses that individual congregations/organizations may fear**

- **The opportunities that a collaborative program would provide to our congregation and members**

- **Possible threats our community**

Be sure to capture all of the comments made during the analysis.
NOTES FOR FACILITATOR

There is preparation necessary for the discussion about Rabbi Moses' hypothesis and challenge. Share the “Introduction to the Collaboration Study Guide,” listen to the highlights clip from Rabbi Moses’ learning session, and read his full article.

Too often we plan based on perceived reality and don’t consider our options. We are left with too many dreams that will never come to fruition based on our scarce human and financial resources. Collaboration brings the potential to dream big, or at least bigger than usual. As the senior leadership of the congregation, you have a vision of what you want the congregational community to experience, to enjoy, to become. How often do you take the time to be daring and consider what that could mean for your community? As the senior leaders of the congregation, this session is a first step in considering what you might be able to do for your community that is bigger and bolder than you can do on your own.

This activity should take approximately 45 minutes.

Materials Needed

- Large Flip Chart or Large Post-it notes
- Markers
- Copies of worksheet

Activity

- Begin with a reading of the introduction from the worksheet to the group.
- Break into groups of 4-6 people, making sure to include EC members and staff in each group. Distribute a copy of the worksheet to each person. (Supply each group with a flip chart or large Post-it notes and a marker and ask for a volunteer in each group to act as scribe.)

Dreaming Big (15 minutes)

The first exercise is to get everyone to dream about what they would like to do for the congregation without the constraints of budget, space or anything else.

Reality Check (20 minutes)

Here is where you truly learn about collaboration by finding partners for a program and understanding the benefits and risks involved. There are two options for this exercise: the group can use the program they chose at the end of the Dreaming Big activity, or use one of their congregation’s existing programs.

Sharing Your Plans (10 minutes)

- Each group should present the idea chosen and briefly share with whom they would partner, why, the benefits and potential risks.
- As a large group share how these activities have helped you think differently about collaboration.
Executive Committee with Senior Staff Worksheet

Rabbi Jay Moses is sounding an alarm. The changing demographics of our communities require us to recognize a new reality. “Waiting lists” to join congregations have disappeared and our “resources—members, revenue, energy and prestige—are getting scarcer.” While congregations have long believed that they must compete to survive and thrive, Rabbi Moses is challenging us to rethink this strategy. He asks “Why don’t congregations usually collaborate? Why should they? And how can leaders of congregations learn to collaborate well?”

Rabbi Moses observes that in today’s Jewish world few congregations have adopted partnerships for their mutual benefit. They are being held back by the culture of competition and the ego that comes with success. During the decades of growing membership, collaboration around mutual goals was rare and often limited to small congregations or one-off events. Even today, most congregations still compete with each other for new members, and the resources and energy that those members bring with them. Their messages focus on the unique qualities that set them apart, not the (few) programs and activities that they build and share together.

His hypothesis is that the declining resources and changing attitudes of the 21st century demand cooperation and collaboration to achieve a healthy future for the larger Jewish community. However, he warns that changing a culture of competition to one of partnership does not come easy.

Dream Big

The Executive Committee (EC) has routinely discussed the challenge of engaging the members in meaningful opportunities to learn, worship, build relationships and repair the world. Inevitably this leads to innovative ideas for new study, new activities, and greater transparency through enhanced information available to members. This requires more planning and more deliverables, but often without greater resources.

- The Executive Committee and senior staff are meeting together before any discussion about the budget for next year.
- Make a wish list for new programs and services that you would like to introduce at the congregation. This is about dreaming big and listing new ideas without worrying about practical limitations.
  - Have someone in your group list all of the ideas on flip chart paper.
  - Each person in the group should speak to the benefits of one idea on the list.
  - As a group, attempt to reach a consensus on one new program to try for next year.

Reality Check

There are two options to choose from for this next activity.

Option 1:

Time to face reality. This new program you have decided upon is wonderful but we don’t have the resources (human, financial, etc.) to be able to implement as it stands. Membership and revenue are not likely to grow significantly next year, and everyone will need to use their resources more efficiently in order to be able to introduce the new program. Collaboration with other congregations or organizations could be a solution. Consider whether the new program lends itself to collaboration. Discuss the following (be sure that someone serves as a scribe):

- With whom could we collaborate?
• How would the model be designed?

• How would the collaboration strengthen us and the other congregation(s) or organization(s)?

• Are there any weaknesses of delivering the program as a collaboration?

• What opportunities exist with this collaborative program for our congregation and our members?

• Could this collaboration be perceived as a threat to an individual participating organization? Why or why not?

Option 2:
Consider converting one of your existing programs to a collaborative partnership with another congregation/organization, with the plan that this would free up staff, volunteers and resources to reallocate to the new program. Choose whichever program you would like and answer the following questions (be sure that someone serves as a scribe):

• With whom could we collaborate?

• How would the model be designed?

• How would the collaboration strengthen us and the other congregation(s) or organization(s)?

• Are there any weaknesses of delivering the program as a collaboration?

• What opportunities exist with this collaborative program for our congregation and our members?

• Could this collaboration be perceived as a threat to an individual participating organization? Why or why not?