

# Moving to the Leading Edge

A URJ Resource and Discussion Guide to Move Your Congregation Forward



November 2016



## Foreword

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A lot of attention is paid these days to innovative start-ups in the Jewish world. And much of this attention is well-deserved. The energy and creativity being unleashed are both extraordinary and critical to the present and future of Jewish life in North America, and, likely, worldwide. But too often, it is similarly assumed that because established institutions are, well, established, they are not innovating internally. Frankly, that's not the case.

At the URJ, we spend our days engaging with congregational leaders representing the 900 congregations of the URJ, and I can tell you that there is significant innovation happening in synagogues across North America. The conventional wisdom has shifted. No longer are congregations waiting for the conveyor belt to deliver them new members. They realize that existing solely to sustain their institutions is not a long-term prospect for growth or even for survival.

Instead, they now see that they must innovate, by transforming the way that they create sacred community and meaningful Jewish experiences to have impact on the participants and the world around them. More and more URJ congregations are experimenting, some of them on their own and some in partnership with other congregations. And it's happening in all sizes of congregations with different demographic profiles, all over North America.

### **On their own**

Congregations large and small are experimenting with new ways of engaging families with young children. A congregation too small to employ a full time rabbi invites families in one at a time for learning and community. A large congregation across the continent tries moving its story time to the local coffee shop but then brings it back to their building when it grows so big that they need more space.

Shabbat dinner groups and Havdalah gatherings in homes are springing up where congregations are now experimenting with helping congregants find ways to experience Shabbat outside of their buildings. This is all happening even as synagogues also experiment with new approaches to Shabbat worship inside of the traditional synagogue building

### **In partnership with others**

A group of very large URJ congregations is experimenting with using small group models of engagement. They are bringing congregants together to explore Jewish text and the meaning that they have for their lives. In addition, the congregations are in conversation with each other so that they can learn from what each does and even collaborate on curriculum.

At the other end of the spectrum, leaders in small congregations are collaborating and sharing resources in new ways so that they can benefit from each other's experiences and investments. For instance, small congregations in San Francisco are coming together across denominational lines to share resources and work on joint programming, learning that the conversation to find commonality can create opportunities they couldn't have imagined on their own.

Congregations across North America are partnering with URJ camps and NFTY to provide deep and meaningful engagement experiences for teens. Some congregations are working with URJ camps to provide significant pieces of their children's education programming.

Within our vast network, we hold great strength. The URJ weaves a network of leaders across North America to discuss and share innovations, lowering the fears and risks inherent in change.

Within this resource, we have gathered articles on various topics that are of interest to congregational leaders. These pieces serve as triggers for discussion and as ways to share the knowledge gathered from within our network about specific topics. The articles in this resource have been written by URJ staff members, by experts in the fields of leadership and congregational life, as well as by leaders from URJ congregations who are doing innovative work. Where appropriate, each comes with a set of questions that you can use to take the discussion to your congregational leadership.

We hope that these pieces will help you innovate and inspire sacred action at your congregation.

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## Special Thanks

The articles in Moving to the Leading Edge have been written by URJ staff members, by experts in the fields of leadership and congregational life and by congregational leaders who are doing innovative work. Bios for each of the writers can be found at the bottom of each article.

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# Triggers for Reflective Conversations





## 8 Principles that Drive Strong Congregations

by Amy Asin

All congregational leaders are looking for the magic formula to success, the one that will ensure that their members are happy, engaged, and Jewishly fulfilled, and that their budgets are balanced. Though there's no one-size-fits-all solution, there are a few tried-and-true organizational approaches to strengthening congregational life—and we at the Union for Reform Judaism are happy to share what we've learned by working with you through [Communities of Practice](#), [Leadership Institute](#) programs and other engagement opportunities. Through this work, we've identified several themes that are vital to congregational success—and we've compiled a few of those not-so-secretive secrets here.

### 1. Start with why.

As leadership expert Simon Sinek [said in his TED Talk](#), we need to start with “Why?”—and the answer must be more than just a desire to sustain our organization or our community. Rather, it must articulate what we are trying to *achieve* within our community. Some congregations say their “why” is to repair the self and the world; others seek to build communities that “do justice, love mercy, and walk humbly with God” (Micah, 6:8). Identifying *your* why, also known as your mission, will help your congregation determine what to do and how to do it, going beyond doing what you've always done and beginning instead to understand what you're trying to achieve in your sacred community.

### 2. Be aware of the sacred.

Leading a congregation differs from leading a corporation, small business, or even other types of non-profits. Because our congregations are sacred communities, our work is heightened and our mission takes on increased importance. Because our leaders sit in pews next to one another, and our clergy may officiate at lay leaders' weddings or visit them in their hospital beds, our relationships are much more intimate and complex than even those at other Jewish organizations.

### 3. Focus on best principles, not best practices.

Everyone wants an easy answer—“Tell me what to do, and I'll do it!”—but given congregations' varied histories, cultures, demographics, physical spaces, and resources, no one solution will work for every community, and given the complex challenges presented by a rapidly changing world, simple plug-in solutions are unlikely to work for long. Instead, we work with “best principles” not “best practices”. Different congregations may implement a best principle in different ways. One example is the practice of giving a *d'var Torah* at board and committee meetings: The best principle is to bring the sacred to our deliberations, but many different practices can achieve this principle. Some congregations hold text study at their meetings; others ask board members to share stories about their Jewish identity; still others start with a blessing on the *bimah* and then move into another space for the meeting itself. Each one of these practices can bring Jewish text or ritual to leaders' deliberations, and all illustrate the best principle of seeing leadership as a sacred task.

### 4. Experiment.

Figuring out how to apply a best principle in your congregation will require you to try out a few different approaches to find a practice that works for you. For example, in the case of bringing the sacred to board meetings, you may try four different approaches in four different meetings and then discuss with the board which worked best. In an environment with unknown solutions and rapidly changing requirements, encouraging a culture of experimentation is critical to congregational success.

## 5. Bring participants into the process.

When experimenting, involve participants in the process. A discipline called “design thinking” is being applied to Jewish life and provides tools for incorporating the needs of participants into the design process. Co-creation in program areas such as social events, social action initiatives, education, and worship leads to greater ownership on the part of participants—which leads to greater involvement and a greater likelihood of achieving your mission.

## 6. Redefine success.

Many congregations seek to deepen congregants’ engagement—supporting relationship development, creating meaningful experiences, and having an impact on their lives, which in turn enables them to achieve their mission and have an effect on the world—all through the lens of Jewish tradition. Nonetheless, many congregations still define success by how many people attend, how well they stick to the budget, and how many attendees complain afterward (or not). If we want our congregations to be places of deep relationship, impact, and meaning, we must constantly explore and discuss new measures of success.

## 7. Work as a team.

No one person can be responsible for a congregation’s success; it takes the talent and dedication of a team of people working together. There are many models of partnership among lay and professional leaders in congregational life, but in every case, the sweet spot of success lies somewhere between taking all the power for ourselves and delegating everything to others. For example, lay leaders, clergy, and staff can collaborate to discuss the goals of a program and then divvy up the responsibilities to implement it.

## 8. Manage the transition, not just the change.

William Bridges, the father of transition management, spoke about transition as the human side of change, the psychological process of adapting to change. Very often congregations make changes that make sense strategically, make sense from a resource perspective, and may even make sense from a congregant perspective. But if they ignore the human side of change, they are often left wondering why there is so much resistance to a seemingly logical transition. Many congregations are applying Bridges’ principles to major staff transitions, and we are starting to see these principles applied in programmatic changes as well. As a result, congregants who have a more difficult time with the transition feel like they are being heard, and the entire community better embraces the transition.

We at the URJ look forward to working with you to apply these concepts to strengthen your congregation, ensuring that your community thrives now and for the next generations.

### Additional Resources:

1. On design thinking (principle 5):
  - a. [Design Thinking: A Praxis for Creating User-Centered Experiences](#), *eJewish Philanthropy*
  - b. [Jewish Teens in Boston Embrace Design Thinking](#), *eJewish Philanthropy*
2. On redefining success (principle 6): “[Using New Measures to Change the Conversation about Success \(and Your Congregation\)](#)”, *How Congregations Measure Success: The National Association for Temple Administration Journal* winter 2014. 4-7.
3. [Paving the Road to Meaningful Young Adult Engagement](#)—A URJ Resource
4. [Engaging Families with Young Children](#)—A URJ Resource
5. [Reimagining Financial Support](#)—A URJ Resource

**Discussion Questions:**

Consider using this piece in your next board meeting with the following activity:

- After reading this piece, discuss:
  1. What are some of the major priorities for your congregation?
  2. Which principles could help you in addressing some of your major priorities?

**Activity:**

- Give each participant a piece of paper with 8 lines on it
- Label the left end of each line “Needs a lot of work,” and label the right side of each line “We have mastered this.”
- Ask each participant to make the spot on the line that best represents where they think the congregation is for each of the eight principles
- Put up a large piece of flip chart paper with similar eight lines
- Ask each person to mark each line in the same place they marked their paper
- Now look at the data:
  1. Which principles have the most/least consensus?

This might be because:

    - Some parts of the congregation are further ahead than others
    - A participant isn’t informed about some things that are happening
    - People in different parts of the congregation have different priorities
    - Different leaders have different strengths, making it easier for them to progress on certain dimensions
  2. Which principles are strongest/weakest?
  3. What can you learn about the areas that are further behind from those that are further ahead?
  4. How can you make progress in the areas where you are weakest?
  5. What needs to be shared with all leaders in order to bring them most deeply into the conversation?

How do we do that?

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**Amy Asin** is the URJ’s Vice President and Director of Strengthening Congregations.



## Five Questions (and Answers!) about New Measures of Congregational Success

by Amy Asin

*View the video to the left before reading this article.*

Congregations have a tendency to measure success by counting the number of heads in the room – but if they want to become stronger, this is actually the number-one habit congregations need to break. Since 2013, I’ve had the privilege of presenting my presentation on this topic, aptly titled “Beyond Counting Heads,” to hundreds of congregational leaders. Now, it’s also [available in a short video](#), and in [this accompanying article](#), which details the five-step process of adopting new measures.

When I give this presentation, I’m often asked the same five questions, all of which speak to congregational leaders’ concerns about adding new measures of success (relationships, impact, and meaning) to their existing ones (including head counts, budget, food/space, and complaints). Here are those questions and my answers to them, designed to help congregations look to the future.

### 1. “Why do we need to adopt new measures?”

Most congregational leaders are very concerned about traditional measures of success, and perhaps more than anything, about budget. They should be, because having an economically sustainable organization is critical to its present and future – but if all we care about is a balanced budget, then we’re indicating that we don’t care about whether congregants are having meaningful or transformational experiences.

Some people fear that if we start looking at newer measures of success, we will lose sight of budgets and headcounts—but this is a false assumption. We must also get better at understanding the tradeoffs we make when we cut expenses. To assume that the quality of what we do will stay the same is erroneous. Adding new measures doesn’t mean getting rid of the existing ones; it does mean adding perspective to our financial decisions.

### 2. “Doesn’t it take a lot of time to work on and talk about relationships, impact, and meaning?”

Maybe. If your current board and committee meetings focus on how to get more people to attend your events, how to shave expenses to stay within budget, or how to corral more volunteers, then adding in discussions about how to achieve success under a new set of measures could take more time.

But consider this: Maybe you’re spending too much time on the existing discussion. If you’re only having surface-level conversations with congregants, then yes, developing deeper intimacy will be difficult—but if leadership does not embrace a shift toward placing congregants first by being willing to talk about these critical issues, then change simply will not happen.

### 3. “What if my board members aren’t good at building relationships?”

Not every board member was chosen for their position because he or she is outgoing and great at working the room at an *oneg*—and that shouldn’t be expected. Neither, though, should it be expected that all of that work should be left to clergy or that only top leadership builds relationships. If we want to be stronger, we will likely need to double or triple the number of congregants who see themselves as leaders in our congregations. Everyone is responsible.

### 4. “Won’t the new measures be based on anecdotal evidence?”

Again, maybe. This question assumes that the current data we use to make decisions in our congregations is the correct data and that any new data measures will be weaker. Instead, I challenge the assumption that we are currently using the right data. Anecdotal evidence, while imperfect, is better than completely ignoring a whole set of factors, and it is possible to systematically collect qualitative data—but it takes a shift in perspective.

## 5. “How do we actually do this?”

Going beyond counting heads is a five-step process which includes reaching out to congregants to understand more deeply how they define success. I outline this process in [this article](#) and [my recent video presentation](#). As congregations around North America start to experiment with new methods of collecting data, we continue to hear new, creative examples of how our communities are adopting new measures of success in order to stay agile and relevant now and for the generations to come.

### Additional Resources:

1. [Beyond Counting Heads](#) by Amy Asin—a video presentation

### Discussion Questions:

- Begin by [watching Amy Asin’s video presentation](#) of how congregations can go “beyond counting heads.”
- Discuss as a group:
  1. What questions do you have about what you saw in the video?
  2. What do you currently do at your congregation to reinforce a culture where budget and attendance (“counting heads”) are seen as the primary (or only) measures of success?
- Depending on the size of your group, stay in one group or break into smaller sub-groups. Discuss the following questions:
  3. How do you currently go “beyond counting heads” and measure success through the prisms of relationship, meaning and impact?
  4. If you could gain a better balance between the existing measures of success (attendance, budget, etc.) and the new measures (relationship, impact and meaning):
    - a. How might your congregation benefit from this revised approach in regards to measuring and defining success?
    - b. What would your concerns be about shifting the way you define and measure success?
    - c. Overall, how do the potential positive outcomes compare to the possible negative outcomes? Do you think that it would be desirable to make this shift?
  5. What barriers and challenges might you face if you try to shift from counting heads to defining success through the new measures (relationship, meaning and impact)?
- If you had broken up into sub-groups, come together as a single group and debrief the discussion:
  6. Based on your conversations, do you believe that this would be a strategic time to move forward and test the new measures?

If you want to move forward, follow the five-step process outlined in the article [Change Your Congregational Culture by Changing How You Measure Success](#).

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**Amy Asin** is the URJ’s Vice President and Director of Strengthening Congregations.



## Change Your Congregational Culture by Changing How You Measure Success

by Amy Asin

Twenty-first century synagogue life challenges congregations to shift from a program-driven culture to a people-driven culture. One of the biggest barriers to this shift is the way we discuss and measure success. What we measure drives our conversations and thus our behavior.

We need to shift from only considering traditional measures of success (these include attendance, whether we met budget, whether we ran out of food, number of complaints received, and whether staff seemed on-task) to adding measures that go further. These new measures must address the whole of congregational

life, and revolve around what matters most to our members. ([Watch my video on why this shift needs to happen](#) and [this accompanying article addressing congregational leaders' concerns about new measures.](#))

We need not discard the old measures of success, but in order to stay relevant and to succeed, we must also incorporate and focus on these new measures:

- **Relationships:** Are we helping congregants build deep relationships with people who will be there for them in difficult times and times of joy?
- **Meaning:** Are we building meaning by bringing Jewish tradition and wisdom to the challenges our congregants face?
- **Impact:** Are we having an impact on our congregants and the world around them?

To add these new measures to your toolkit, I propose a five-step process:

### 1. Define the new measures

What do relationships, meaning, and impact actually mean? Different congregations will define these measures differently, so figure out what they mean for your community. To do so, talk to members of your congregation, interview congregants, and hold board and committee discussions about these terms. Ask them to finish this sentence: “An event or experience at my congregation is successful to me when \_\_\_\_\_.” If you immerse yourself in how your community views these measures, you’ll be able to use the vocabulary your congregants are using – which is, in fact, how your membership defines success.

### 2. Analyze what you currently do.

Once you’ve established your congregation’s definitions of these three measures, think about how your current work stacks up through these lenses. Ask yourself: How would we do if we were measuring Purim or High Holidays by our congregants’ definitions of success? Test congregant-facing events and experiences, as well as back-end processes such as dues policies, new-member onboarding, and committee meetings. If any of these elements don’t seem successful through the lens of congregants’ definitions of success, ask yourself: How could we do things differently?

### 3. Start talking about new measures.

Begin every board or staff meeting with a 15-minute discussion about your progress in building relationships, creating meaning, and making an impact (according to your members’ definitions). Then, expand this discussion to anyone who runs a program at your congregation. Anyone who has a leadership position or a leadership role needs to embrace these new measures in order for them to truly become your congregational mindset.

These concepts must also be incorporated into non-programmatic and non-administrative interactions at your congregation, such as hallway discussions with congregants or the sentiments in condolence cards. When you take these actions, how are you building a relationship, creating meaning, and making an impact?

#### **4. Test your measurement tools on one area of your congregation.**

There are a variety of measurement tools your congregation can use to test its new measurements, including focus groups and surveys. Build your measurement tool based on your membership's definitions of relationship, meaning, and impact. For example, if your members have defined success in relationship-building as having a strong sense of community beyond congregational events, you could ask questions like: To what extent do you have relationships that extend beyond the walls of the congregation? How many times have you been to other members' homes for Shabbat dinner?

Don't tackle all areas of congregational life at once; rather, pick one area to test this tool. Try choosing a specific program (a Purim celebration), demographic group (parents of religious school kids) or office function (new member onboarding).

The frequency of measuring should be tied to the specific area you're focusing on. You will see that some programs will need to be measured every time they take place, while it makes more sense to measure other programs once a quarter or once a year. When you establish the frequency for these measurements, you should also take into account your staff or lay leadership capacity to assess the data from your measurement tools.

#### **5. Expand your test.**

Once you determine how your measurement tool works for your congregation and become comfortable with it, reflect on what you've learned and consider the best way to expand your test into another area of your congregation. If you initially tested a program, might it make sense to test another program or to shift your focus to testing a demographic group? Engage in constant reflection as you expand this work to more areas of congregational life.

These new measures of success support the shift to a congregant-driven culture. Going "beyond counting heads" really means shifting the focus from thinking about how many people are showing up at an event to thinking about individual congregants and their relationships with the congregation over time. It means assessing congregants' patterns of behavior and connecting with them according to their individualized interests.

This isn't an easy shift, but it is necessary in order for our congregations to continue thriving now and for the generations to come.



## Closing the Gap Between Good Intentions and Bad Results

by Allison Fine

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 powerful. 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—even 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?

### Additional Resources and Discussion Questions:

- *The 2015–16 Scholar Series on Leadership—A URJ Resource and Discussion Guide*

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**Allison Fine** is an award-winning author and a URJ faculty member. Her books include *Matterness: Fearless Leadership for a Social World*, *Momentum: Igniting Social Change in the Connected Age*, and *The Networked Nonprofit*.



## Strong Congregational Leadership Requires Sacred Partnerships

by Lisa Lieberman Barzilai, RJE

*“When people sit together and there are words of Torah between them, the Shechinah dwells among them.” (Pirkei Avot 3:2)*

In Jewish communities, there is little that you do as a single individual. This is certainly true for those of us who are leaders.

A sense of community, belonging, and mutual support are culturally engrained in us as Jewish people. We pray in a *minyan*, and we are expected to provide for those less fortunate and to rejoice with the bride and groom. This communal network is especially important for those of us who are in leadership roles.

Moses’ father-in-law Jethro tells him that leading the people without support from others is nearly impossible—and it’s also a poor leadership model. He encourages Moses to find partners who will help him adjudicate disagreements among the Israelites. Even the Divine expects mortals to assist in leading the Jewish people: The ancient prophets shared the words of God to help the Israelites see the error of their ways, as well as to demonstrate how to create a world of wholeness, justice, and compassion.

Our lives and work depend on partnerships. In Jewish communities, these partnerships can be among volunteers, paid professionals, or lay and professional leaders. Unfortunately, too often these relationships are fraught with a lack of respect, despite the fact that everyone involved is performing holy work. These partnerships create a stronger and more vital endeavor. They are sacred and should be treated as such.

### **Sacred partnerships recognize each of us as individuals working toward shared goals.**

The Talmud, a core text of our people, contains the teachings, opinions, and decisions of thousands of rabbis across centuries. Throughout these “conversations,” the sages of our past express respect and admiration for all, both those with whom they agree and those with differing opinions.

Being in a sacred partnership means that we acknowledge our differences, just like the leaders of past generations did. At the same time, it means that we focus on our pledge and responsibility to the shared goals and common good of our congregation. Each leader may approach their work in a different way. It’s important to embrace these variations and understand that seeking common ground will improve overall decisions and outcomes. This also will enrich relationships among leaders with different inclinations, as they will each have the freedom to undertake endeavors from their own perspectives.

### **Sacred partnerships require trust and clear lines of communication.**

Respect, trust, honesty, communication, transparency, confidentiality, and reflection are the tools we use to build and nurture sacred partnerships. Without these essential and interconnected components, fissures are likely to develop in the relationship. After all, how can leaders demonstrate respect if there is no trust or honesty in their relationships with others? It’s imperative that leaders be able to hear what others say, work to find common ground based on shared goals, and act to bring about an organization’s shared vision.

### **Sacred partnerships are built upon Jewish values.**

The kabbalistic notion of *tikkun olam* reminds us that each person has a spark of the Divine within and that it is our responsibility to heal the world. As Jewish leaders, what sets us apart from our counterparts in the secular world is that the goal of the partnerships we cultivate is to create a better world and to expand this notion of *tikkun olam* beyond what one individual can achieve. Although it is true that partnerships in the secular world also are intended to bring about mutual goals, these goals are neither holy nor sacred.

No matter what type of leader you are—experienced or emerging, lay or professional—the people around you are more than colleagues and collaborators. They are your sacred partners and in relationship with them, you will be able to inspire sacred action in your community.

**Additional Resources:**

1. [8 Principles that Drive Strong Congregations](#) by Amy Asin, *eJewish Philanthropy*
2. [Four Ways to Succeed as a Congregational Leader](#) by Lisa Lieberman Barzilai, RJE, *eJewish Philanthropy*

**Discussion Questions:**

1. With whom are you in a sacred partnership? Think broadly about all of those with whom you work to achieve your congregational goals.
2. What actions have you taken to cultivate and maintain your sacred partnerships? (setting up meetings with your congregational partner, meeting outside of work, scheduling regular phone calls, etc.)
3. How can you leverage the differences between you and your congregational partners to build strong relationships?
4. What is similar in congregational partnerships to other working relationships? What is unique?
5. In what ways do your sacred partnerships allow you to create a world of wholeness, compassion and justice?
6. Think about one sacred partnership in which you are engaged. What is one commitment you will make to strengthen that relationship?

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**Lisa Lieberman Barzilai**, RJE, is the director of the URJ Leadership Institute.



## The Future of Reform Judaism: How Can We Lead in Changing Times

by Marty Linsky

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, next 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.

#### **Additional Resources and Discussion Questions:**

- *The 2015–16 Scholar Series on Leadership—A URJ Resource and Discussion Guide*

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**Marty Linsky** is a faculty member of the Harvard Kennedy School and a co-founder of Cambridge Leadership Associates.



## Collaboration Won't Kill Us, but Failing to Collaborate Might

by Rabbi Jay Henry Moses

“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*!

#### **Additional Resources and Discussion Questions:**

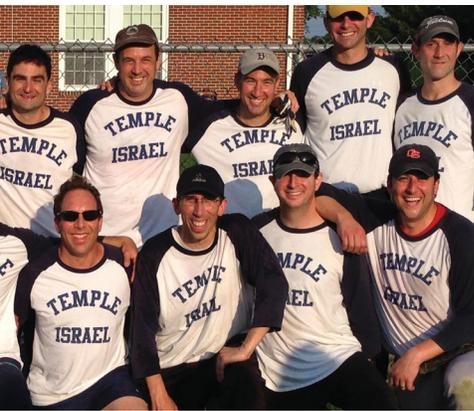
- *The 2015–16 Scholar Series on Leadership—A URJ Resource and Discussion Guide*

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**Rabbi Jay Moses** is the Vice President of the Wexner Foundation.

## Why Congregational Competition Is a Good Thing

by Larry Glickman, FTA



Congregational leaders work tirelessly to make their communities strong and allow them to flourish *l'dor vador*, from generation to generation. That includes bringing new families into the congregation, which strengthens the community both relationally and financially.

Of course, the inverse of a family choosing to join one congregation is that they don't join the temple down the street or on the other side of town. As a result, our congregations often find themselves competing for every new member in the area.

This competitive spirit seems to extend to the online sphere. Responses to a survey of users in [The Tent](#), the communication and collaboration platform for leaders in the Reform Movement, showed that congregational leaders are happy to use resources shared by other congregations, but are hesitant to share their own valuable intellectual property with neighboring congregations. They fear their ideas may be copied, that people may decide to join neighboring congregations instead, and that

their congregational membership (and ultimately income) will decrease.

Rabbi Jay Moses, vice president of the Wexner Foundation, [elaborates on why this is happening](#):

*"Congregations don't typically collaborate because our institutions are not built to collaborate. The structure and 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."*

Collaboration may seem challenging and even in conflict with the sacred work we as synagogue leaders do to grow and strengthen our congregations. Lay and professional congregational leaders want to protect their valuable work so it will benefit their congregation.

But how far does this extend?

To what extent do we want all Jewish families in our area to join our congregation, even at the expense of neighboring congregations? Do we want other congregations to close? Do we want our vibrant Jewish community—with its varied voices and approaches to Reform Jewish life—to be of a single voice?

Perhaps that is an extreme eventuality, but healthy competition between congregations can, in fact, be a *good* thing. When organizations work in friendly competition with their neighbors, they stay sharp and focused, always moving forward. There are ways to be competitive and cooperative while still maintaining a strong sense of community and individuality—though it might entail a shift in mindset.

Here are three ways your congregation can start embracing other local Jewish institutions:

1. Work with other congregations to advertise affiliation. "Your four area congregations look forward to celebrating the High Holidays and encourage you to affiliate with the congregation that best serves the needs of your family." That is a powerful statement that will speak to both the affiliated and unaffiliated Jews of your community.
2. If your congregation cannot offer potential members an early childhood program, recommend that they enroll their children in the early childhood program at the congregation down the street. Further, recommend they join that congregation, because your congregation recognizes the value of families formally belonging to the sacred community where their children are being educated.
3. Work hard to create curriculum and programming... and then share it! That may feel like a scary proposition, but it can be incredibly rewarding and powerful. Sit down with leaders at other area congregations and discuss your plans

for the upcoming year. Find areas of possible collaboration, including avoiding calendar conflicts. Learn from one another and find continued, shared inspiration.

If this seems daunting, that is understandable—but what if our organizations don't collaborate? What will happen if we silo ourselves?

In 2001, *The Telegraph* reported on the Jewish population of Afghanistan, which numbered just two Jews in the whole country. Yitzhak and Zebolan lived across a courtyard from one another, yet each maintained a synagogue of his own—and an intense, years-long dislike of the other.

“He is an old fool whose brains do not work properly,” Zebolan said of Yitzhak.

“He is arrogant and ruthless,” Yitzhak said of Zebolan.

Two Jews, each barred from the synagogue of his neighbor due to a disagreement over ownership of a 500-year-old Torah (which, as a result of the disagreement, was hidden away in a Taliban storage facility). Since the article's publication, Yitzhak has died and Zebolan continues to care for his synagogue alone. The synagogue across the street stands empty. There is no *minyan*.

Even if Yitzhak and Zebolan had found a way to utilize effective collaboration techniques, today Zebolan would still be the last Jew of Afghanistan. For a time, though—for a special and sacred time—they would have had a community. They would have been able to pray with and learn from each other. They would have been able to celebrate.

Jewish families belong to a temple to be part of a larger community, just as synagogues belong to a movement to be part of a larger community. We all want to be part of something bigger than ourselves, connected to a network with shared interests, passions, and goals—so collaborate with your neighbors and become stronger together.

#### **Additional Resources:**

1. Rabbi Jay Moses. “Collaboration Won't Kill Us... but Failing to Collaborate Might.” [The 2015-16 URJ Scholar Series Resource](#). 45-67.
2. “[The last two Jews in Kabul fight like cat and dog.](#)” *The Telegraph*. December 4, 2001.

#### **Discussion Questions:**

1. Please read the entire [Telegraph article](#) about Zebolan and Yitzhak:
  - What are three things Zebolan and Yitzhak could have done in order to help create a sense of community between themselves?
  - What can you learn from that?
2. Refer back to Rabbi Moses' thoughts on collaboration:  
“Our institutions are not built to collaborate. [...] Rabbis and synagogue leaders 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.” ([The 2015-16 URJ Scholar Series Resource](#), 45-46)
  - Do you agree with Rabbi Moses' assertion? Why or why not?
3. What are three examples of ways in which your congregation has collaborated with other Jewish institutions in your community during the last year?
4. Think of three times during the last year in which your congregation could have collaborated with other Jewish institutions in your community, and did not:
  - Discuss what these opportunities could have been.
  - How would have both (or all) institutions benefitted from this collaboration?
  - What steps can your congregation take to seize such opportunities in the future?

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**Larry Glickman**, FTA, is the URJ's Director of Network Engagement and Collaboration.



## Becoming a Values-based Leader

by Harry Kraemer

Becoming a values-based leader isn't about emulating a role model or a historic figure. Rather, your leadership must be rooted in who you are and what matters most to you.

In my life, I have tried to stay committed to values-based leadership. No matter what position I'm in, whether father, son, spouse, corporate executive, professor, or board member—or, for that matter, soccer coach, volunteer parent, or Sunday school teacher—I have focused on never losing sight of who I am and what matters most to me.

When you truly know yourself and what you stand for, it is much easier to know what to do in any situation. I believe it comes down to two things:

1. Do the right thing, and;
2. Do the best you can.

That may sound simple, but it's hardly simplistic. Doing the right thing is a lifelong challenge for us all. Fortunately, there are four guiding principles that can help you in the lifelong journey of values-based leadership:

### 1. Self-reflection

You identify your values, what you stand for, and what matters most to you. To be a values-based leader, you must be willing to look within yourself through regular self-reflection and strive for greater self-awareness. After all, if you aren't self-reflective, how can you truly know yourself? If you don't know yourself, how can you lead yourself? If you cannot lead yourself, how can you lead others?

### 2. Balance

Balance is the ability to see situations from multiple perspectives and differing viewpoints to gain a fuller understanding. You consider all sides and opinions with an open mind before coming to a conclusion. You seek to understand before being understood.

### 3. True self-confidence

This means accepting yourself as you are at any point in time. Realizing that you are a work in process, you recognize your strengths and your weaknesses, and you strive for continuous improvement. With true self-confidence, you know there will always be people who are more gifted, accomplished, and successful, but you're OK with who you are.

### 4. Genuine humility

Humility enables you to remember who you are and where you came from, and it keeps life in perspective, particularly as you experience success in your career. In addition, it helps you value each person you encounter and treat everyone respectfully. When people ask you how you have achieved certain accomplishments, you realize that in addition to the fact that you have worked hard and have certain skill sets, your accomplishments are also a result of God-given talents.

By knowing yourself and your values, being committed to balance, and having true self-confidence and genuine humility, you can far more easily make decisions, no matter whether you're facing a crisis or an opportunity.

The real beauty of these four principles is that they can be applied by anyone, from the president of a country to the chief executive of a company, from the junior-most person on staff to the unpaid volunteer leader. You can always apply the principles of values-based leadership; you don't have to—or want to—wait until you have hundreds of people reporting to you. It is never too early or too late to become a values-based leader.

Good luck on your journey to becoming a values-based leader.

**Additional Resources and Discussion Questions:**

- A URJ Leadership Institute resource, based on the 2016-17 Scholar Series on Leadership, will be released in summer 2017

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**Harry Kraemer** is the former chairman and CEO of Baxter International and a Kellogg School of Management Clinical Professor of Strategy.



## When to Say “Yes” and When to Say “No” as a Jewish Leader

by Dr. Erica Brown

In my office is a decorative picture with the words “Become a possibilitarian.” The idea that we “dwell in possibility,” as Emily Dickinson once said, makes life and leadership exciting. Experimentation and innovation invite possibility, and one word seems to extend that invitation and respond to it best: Y-E-S.

Many professionals and volunteers in the Jewish nonprofit world suffer from leadership fatigue. One of the chief symptoms and causes of this problem is the same three-letter word: Y-E-S.

Many of us want to please. We want to be loved. We want to be the kind of people who say yes when asked. After all, we enter Jewish organizational life as professionals or volunteers in order to serve, and we serve when we say yes.

But when we say yes too many times and to too many responsibilities, we may find our energy and capacity dangerously thin. Instead of creating possibilities, we may compromise our ability to lead and influence others. Burn-out awaits.

“Yes” can open up—and “yes” can shut down.

Are you saying yes when you really want to say no? The pressure to conform, comply, or contribute often steers well-meaning but overcommitted individuals to say what they don’t really mean. It reminds me of a particularly prescient and short expression in the Talmud: “Rabbi Yohanan says, ‘There is a yes that is like a no and a no that is like a yes.’” (BT *Bava Kamma* 93a). It’s best to make sure you know what you’re saying.

If you’re a fundraiser or a recruiter, you live for a yes—and there’s a way to expedite that answer. Professors N. Gueguen and A. Pascual [conducted a study](#) of what it took to get people on the street to give a charitable donation. The average rate of success was 10%, but when subjects were told they were free to accept or refuse, a striking 47.5% complied.

Asking alone is insufficient. What helped get people to “yes” was the possibility of and personal freedom to say “no.”

Five years later, the same researchers used a similar technique to find out the increased likelihood of people completing a survey if they had an opt-out clause. Not surprisingly, it worked again. This kind of language set up an exchange dynamic where the kindness of giving someone a choice was repaid, if you will, with the participant giving a positive answer. Giving someone else a choice, in other words, feels empowering and is often rewarded with an affirmation.

Giving someone a get-out clause may be a technique we need to more readily apply in the world of Jewish organizational life. The sense of choice it creates allows people to enter into leadership roles with greater consensuality. It also gives leaders the chance to say no. There will always be guilt attached to saying no, but perhaps it’s time to reassess that guilt.

Many of the people who ask us to get involved, to give money, to come to another meeting are not doing it because it is to our advantage but to theirs. This usually doesn’t enhance our leadership sphere of influence. It diminishes it.

Here are seven questions to ask yourself when considering a leadership role:

1. Am I saying yes to satisfy myself or to satisfy someone else?
2. Is there anyone else who can do this more efficiently, more capably or more willingly?
3. Am I uniquely situated and positioned for this role?
4. Will this role grow my talent and/or give me needed experience and skills?

5. Will saying yes help me better achieve my own leadership goals?
6. Is now the right time in my life to say yes?
7. Will I eventually resent my yes?

If saying no is still hard, find a verbal narrative that helps you say it gracefully, namely by mentioning but bypassing yes. “I’d love to take this on some day. Now is not the right time for me” or “I’m really engaged in a leadership project that is important to me so I can’t say yes to you right now” or “I think so-and-so is a better fit.”

Say yes to too many people or responsibilities, and you’ll find that what you really care about is not getting enough time and space to live and grow.

My most important piece of advice to leaders: Say no to say a bigger yes. That bigger yes will better grow your passion and compassion.

#### **Additional Resources and Discussion Questions:**

- A URJ Leadership Institute resource, based on the 2016-17 Scholar Series on Leadership, will be released in summer 2017

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**Dr. Erica Brown** is an associate professor at George Washington University and the director of its new Mayberg Center for Jewish Education and Leadership. She is also the author of eleven books and a weekly Torah blog.

# Hot Topics for Congregational Leaders





## Inspiring Sacred Action Among Leaders

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### Four Concepts Every Congregational Leader Needs to Embrace

by Lisa Lieberman Barzilai, RJE

The Union for Reform Judaism's [Leadership Institute](#) seeks to inspire sacred action in our congregations by supporting and working with congregational leaders throughout their leadership journey. Whether you're new to leadership, a longtime veteran, or haven't yet entered the leadership ranks, you can have an impact on your congregation.

Through our work, we have learned that there are four key concepts that all leaders—lay or professional, emerging or experienced—need to embrace.

#### **1. Leadership is a set of behaviors, not a position.**

As part of the [URJ Scholar Series on Leadership](#), Marty Linsky, faculty member at the Harvard Kennedy School, teaches that leadership is a set of behaviors, not a position or role. In other words, leadership is a set of verbs, not a noun. Some of the behaviors in which leaders engage include listening to others, bringing people together for discussion, seeking consensus, creating shared vision and goals, and being nimble and flexible.

Change is the new constant, so leaders must continuously hone new skills to stay relevant and engaging and to meet the changing demands of their congregations. At the URJ, we strive to keep our finger on the pulse of innovation in the field of leadership development so we can help leaders strengthen the various behaviors and skills necessary for them to be effective and dynamic.

#### **2. Leadership in congregational life is unique.**

Congregational leaders are not only trying to run successful and sustainable institutions; they are also nurturing souls and building a spiritual home for their community, where people can grow. Therefore, while congregational leaders need to hone traditional skills such as planning, managing, budgeting and programming, they also need to master additional, distinctive skills.

Judaism centers our spiritual community, and so it is essential that congregational leaders learn to use Jewish texts and values in all aspects of their work. They should use these texts and values not only for learning, but also place them at the core of decision making, community-building, and mission development. Leaders must define their personal Torah of leadership—the values that guide their daily lives and express how they lead their congregation. Helping leaders understand their personal Torah of leadership is a priority in all facets of the URJ Leadership Institute.

#### **3. Sacred partnerships are imperative in building a congregational community.**

Congregational leaders are blessed to work with sacred partners who come together for the sake of the community. Just as Moses had Aaron and Miriam to help shoulder the responsibility, congregational leaders have partners on whom they can rely. A congregation's size, structure, culture, and the leader's specific role will determine the best partners from among staff members, lay leaders, and congregants who are not yet holding leadership positions. Sacred partners can even come from other congregations and organizations.

However, sacred partnerships don't just happen; they must be built on a foundation of trust and shared expectations. Like a garden, these relationships must be cultivated so they don't wither and fade away. Learning about one another (both personally and professionally), understanding each other's leadership styles, and working on joint goals to create the best opportunities for success all require time and cannot be rushed.

#### 4. A network of support is critical to leadership development.

Learning is more powerful when done in a supportive network. Learning can come from an expert in the field, but also from congregations that have experimented and found success or have encountered setbacks. At the URJ, we have seen that “one-to-many” consulting and learning can be more effective than in one-on-one settings. Therefore, in our leadership development programs, congregations support one another in their work.

##### **Additional Resources:**

1. Marty Linsky. “Leading in Challenging Times.” [The 2015-16 URJ Scholar Series Resource](#). 29-44.
2. [Strong Congregational Leadership Requires Sacred Partnerships](#) by Lisa Lieberman Barzilai, RJE, *eJewish Philanthropy*

##### **Discussion Questions:**

Consider using this piece in your next board meeting with the following activity:

- Break into small groups of no more than 3 or 4 people.
- Be sure to designate a note-taker and together discuss the following questions:
  1. *Each person in the group should answer the following question:* What leadership behaviors do I exhibit?  
If you want to make this anonymous, you can give the participants index cards to write upon. The index cards should be placed in a single pile and read together.
  2. What other behaviors do we need as a board in order to lead our congregation effectively?
  3. How is being a congregational leader different from being a leader in other settings?
  4. What is Jewish about my leadership at the congregation?
  5. *Each person in the group should respond:* With whom do I have sacred partnerships in the work that I do on behalf of the congregation?
  6. What networks do we have that support the work of our congregation?
- The facilitator of this activity should place large pieces of paper around the room with the following titles:
  1. Necessary Leadership Behaviors for Our Board
  2. Jewish Leadership Is...
  3. Sacred Partnerships
  4. Our Networks of Support
- Come together as a single group. The note-takers should write the notes from their sub-group on the large pieces of paper as brief bullet points.
- Provide each participant with six dot stickers. The stickers should be placed on the large pieces of paper as follows:
  1. Three dots should be placed next the top leadership behaviors you have
  2. One dot should be placed next to the response to “Jewish Leadership Is...” that most resonates with you
  3. One dot should be placed next to the person or group with whom you would like to either build or strengthen a sacred partnership

4. One dot should be placed next to your congregation's support group that you identify as most important
- After everyone places their dots, the facilitator will discuss trends she or he notices.
  - Based on the facilitator's observations, discuss as a group:
    1. What are the two most important trends for your congregation?
    2. In order to strengthen or improve on these trends, what are some actions that the leadership and/or entire congregation can take?

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**Lisa Lieberman Barzilai**, RJE, is the director of the URJ Leadership Institute.



## Inspiring Sacred Action Among Leaders

### How to Identify and Train Emerging Leaders at Your Congregation

by Jason Fenster and Karen Sirota

In recent years, a number of studies have explored the benefits of dedicated leadership programs. In the corporate world, studies have shown that more than one-third of new hires have had little or no training, and nearly 20 percent of employees who quit within the first six months said it was because they didn't receive sufficient training.

It's a cautionary tale for the synagogue world, too.

Among the many responsibilities of lay leaders, cultivating a pipeline of vibrant, knowledgeable leaders is one of the most central—and ensures a worthy legacy. It leads to seamless leadership transitions and helps ensure the vitality of the congregation's future.

We at the URJ have spent several months working with congregations of all sizes to learn more about their leadership programs and hearing from others about their interest in creating one. Our research and congregational conversations taught us that these principles are important when training leaders:

#### **Congregational leadership is a sacred task.**

A synagogue leadership development program must continuously and intentionally emphasize what it means to be a Jewish leader, including how to fuse both the spiritual and practical, and how to connect to the sacredness of our work. Curriculum should be infused with references and thoughtful opportunities that ground the work in our historic traditions, guided by our sacred texts.

For example, “Leading with a Jewish Heart,” a program developed by [Temple Isaiah](#) in Lafayette, CA, has used a triangular model to underscore their sacred work. The base forms the Jewish values, and the core beliefs, group processes, institutional knowledge, and systems information radiate outward from that base.

Another great example is [Atidaynu](#) (Future Leaders), the leadership training and development program at [Temple Sinai](#) in Atlanta, GA. The program includes a hands-on examination of the congregation's Torah scroll to connect participants to its history and teachings, nuances of the scribe's style, and its relation.

#### **Essential skills and visionary leadership are both taught and modeled.**

Creating effective training for congregational leaders requires a delicate balance of subjects covered. Though basic skills such as bylaws, budget, finances, governance, communication, etc. are essential, it is important to include more esoteric topics such as visionary leadership, change management, direction-setting, member motivation, etc.

It is important that the teaching of both these topic areas model effective leadership. Sessions should be carefully constructed to include pre-readings, appropriate agendas with realistic time expectations, opportunities for respectful conversation both in large and small group gatherings, and time to reflect on lessons learned. Aspects of these sessions should be later discussed to reinforce how they model good leadership.

#### **Meaningful relationships deepen congregational engagement and commitment, making leadership a shared responsibility.**

It has often been said that synagogue engagement is “all about relationships.” Connections lead to commitment and dedication to leadership, as well as to the understanding that leadership is a shared experience. At every juncture, leadership development training must include opportunities for participants to share their Jewish stories and personal reflections, and engage in small group conversations.

*Atid* (Future), the leadership program and part of the robust learning experience at [Community Synagogue of Rye](#) in Rye, N.Y., works to establish a trusting environment as participants share their Jewish journeys and engage in meaningful, targeted conversations. Participants establish a growing relationship with each other throughout the time spent together and the curriculum is woven into these conversations—forming connections that often last beyond the confines of the sessions.

At [Temple Sinai of Bergen County](#) in Tenafly, N.J., their leadership program *Hineini* (“Here I Am / I Am Ready”) demonstrates the importance of relationship-building. After a casual dinner, participants share personal stories and reflections related to the topic for the evening. These interactions build important connections among participants and to the community.

### **Leadership development is an ongoing process that should engage all leaders at all levels.**

As leaders grow into new congregational positions, they need to continue learning. A robust leadership development program must not only include key curricular elements, but opportunities to support work and deepen skillsets as they move through new areas of leadership.

#### **Additional Resources:**

- A comprehensive resource on engaging emerging leaders at your congregation will be released in winter 2017

#### **Discussion Questions:**

1. Describe a recent situation at your synagogue that required the skills of a great leader, either lay or professional.
  - What was the outcome of that situation?
  - How did the leader effectively resolve the situation? What skills and essential qualities were displayed by the leader?
  - If you were called upon to be that leader, what skills and understandings do you have that you would use to arrive at a resolution? Which additional skills would you need to acquire to be even more effective in the resolution?
2. Describe a teaching of Torah that helps you better understand the challenges and/or honor of leadership.
  - How do these words inspire you?
  - How does this leadership message contribute to your personal growth?
  - How might you use this message to encourage others to become leaders and/or teach others about leadership?
3. Think about why you got involved in congregational leadership.
  - What is sacred for you about this work?
  - How do you and your leadership team make your work sacred (and, if you don't, what can you do)?
4. Think about the most important relationships you have in your synagogue community.
  - How did these relationships develop?
  - How have these relationships deepened your connection to your synagogue community and inspired you in your journey to leadership?
  - What strategies would you recommend to help others build similar, meaningful connections?

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**Jason Fenster** is a rabbinic intern with the URJ's Leadership Institute.

**Karen Sirota** is the URJ's Director of Large Congregations.



## Transition Management

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### Managing Change, the Only Constant in Today's World

by Rabbi Janet Offel

Every summer, many congregations prepare to welcome new rabbis and other senior staff members to the temple family. With this period of change comes many emotions—excitement, anxiety, curiosity, sadness at the departure of a long-time beloved rabbi or other staff member...

In our work with the URJ's Strengthening Congregations team, Rabbi David Fine and I interact with Reform congregations all around

North America that are in the midst of change. Whether it be a clergy or senior staffing change, a synagogue merger, an emerging collaboration between multiple synagogues, or any of the other myriad changes that are so much a part of today's world, the only constant seems to be change.

As congregational families, how do we manage feelings of disruption and discomfort in this world of constant change?

We are all familiar with stories from the secular world in which new corporate CEOs have failed spectacularly and of corporate mergers that were deemed to be disasters within weeks of their announcement (think AOL-Time Warner). William Bridges, who in 1991 published the first edition of his groundbreaking book *Managing Transitions: Making the Most of Change*, says that in most of these cases, the problem isn't the change itself but the way people react to it. He calls these reactions "the human side of change."

Bridges notes that a change in one's own world can lead to feelings of disrupted expectations, a threatened sense of security, and fears of looking foolish, awkward, or embarrassed. In a synagogue setting, these feelings may occur among b'nai mitzvah families who were looking forward to the soon-to-be-former rabbi officiating at their children's service. Other congregants may wonder: Will the new rabbi "get" and understand my family and me? Members often feel they are missing key information that might help them understand the implications of the change: Why have so many senior staff members left our synagogue in the last couple of years? What will that mean for our synagogue's future and my own place in it? In Bridges' lexicon, the psychological reorientation that we go through in coming to terms with a change is called "transition management."

In other words, the change is the new rabbi's arrival or the completion of the merger of two congregations. The transition is the process of letting go of old ways and getting comfortable with the new rabbi's personality and behavior, or with the congregational *minhagim* (customs) that new leaders institute.

Bridges developed a model for managing transitions in which he defined three phases of the process: *ending*, *neutral zone*, and *new beginning*.

*Endings* often include emotions that we label as negative: sadness, anger, denial, resentment, fear, anxiety, loss, betrayal, and abandonment. These are predictable, normal emotions when grappling with an ending. Even when the change is positive, there are feelings of ending and loss. Of course, there can also be feelings of excitement and anticipation in the ending zone, but they are often bittersweet and mixed with at least a tinge of sadness and loss.

*The neutral zone* is often characterized by feelings of confusion, disorientation, apathy, disconnection, and impatience. It is a time in which people complain about a loss of leadership – i.e., the outgoing rabbi seems to have "checked out" and

the new rabbi isn't here yet. Frequently, synagogue leaders ask how many members they should expect to lose when going through the rabbinic placement process. It is because of their own fears of the neutral zone that this becomes such a big worry. A wonderful video titled *The Trapeze*, based upon the poem by Danaan Parry, is worth watching for a better grasp on this phase. Indeed, the neutral zone is that moment when you have let go of the old trapeze bar but have not yet grabbed the new one, evoking a mix of emotions: fear and excitement, impatience and curiosity, disorientation and openness.

Individuals finally enter *the new beginning phase* once they become comfortable with the change. At the very least, congregants feel a sense of ease in this phase. When the transition process is carefully managed, fully embracing the new beginning leads to a sense of recommitment and reengagement, and, as a result, a congregational family that is energized, vigorous and renewed.

#### **Additional Resources:**

1. A comprehensive resource on transition management will be issued in 2017
2. The URJ's Director of Transition Management, [Rabbi Janet Offel](#) and [Rabbi David Fine](#) are available to assist congregations with inquiries about transition management
3. The [Senior/Solo Rabbinic Transition group](#) in The Tent

#### **Discussion Questions:**

1. Think of a time in your own life when you were impacted by some kind of change:
  - What was the actual change that occurred?
  - Can you identify the milestones or significant moments that signified the various phases of transition for you (ending, neutral phase, new beginning)? What were they?
  - How did you move through the emotions generated by this change?
  - What could have helped you manage the dynamics of the change better?
2. Think about a change that has taken place in the synagogue:
  - How did people react to the change?
  - Now that you have an understanding of William Bridges' model of transition management, how well did your congregational leadership manage the change process that your community was undergoing? Was there an outlet for communication of emotions for the different audiences in your congregation?
  - What were some of the ways in which there was acknowledgment and responsiveness to the concept of endings, neutral zone and new beginnings?

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**Rabbi Janet Offel** is the URJ's Director of Consulting and Transition Management.



## Transition Management

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### 8 Tips for Managing Your Congregation's Rabbinic Transition

by Rabbi Janet Offel

At some point, every congregation faces a time of rabbinic transition—and the process is inevitably an emotional one.

As author William Bridges notes in his book *Managing Transitions: Making the Most of Change*, those undergoing such a change will have to say goodbye to what used to be and then experience a neutral phase before they can embark on a new beginning.

In a synagogue, congregants are likely to progress differently through the phases of transition.

For some, the transition will bring about hopeful feelings of welcoming a new rabbi; others will face the sadness of saying goodbye to the previous rabbi; and still others will find themselves uncertain about the whole thing, lingering in a neutral phase between the two.

How can congregational leaders effectively manage these various emotions?

The following tips include insight from David Goldman, executive director of [Congregation Emanu-El](#) in San Francisco, CA, and a former lay leader who served as co-chair of the congregation's rabbi search, and Connell Saltzman, past president of [Temple Emanuel](#) in Denver, CO, and a past co-chair of its senior rabbi search committee. Together, we presented a session at the [2015 URJ Biennial](#) about important lessons we've all learned about the rabbinic transition process.

- 1. Try to plan as early as possible.** This is, of course, easier to do when the outgoing clergy member gives ample notice (more than one year is ideal), allowing congregational leaders to start planning for the transition far in advance. When talking to your rabbi about retirement, be gentle but try to set a date well in advance. Taking this emotional conversation off of the table will assist in a smooth transition in the final years.
- 2. Embrace opportunities during transition.** A rabbinic transition can provide the opportunity for new beginnings, so allow the congregation to reflect about what has been going well in addition to exploring areas for growth. Consider utilizing facilitated focus groups and well-designed surveys, and include the conclusions in your search committee's deliberations. You might find that some of the issues can be addressed immediately, while others are included in strategic planning for the future.
- 3. Involve senior staff and other clergy in the transition.** It's important to involve key congregational players in the transition, and communicating frequently about how the process is progressing will both foster buy-in and help the congregation deal with emotions related to the transition. This includes offering senior staff, other clergy, and key congregational stakeholders (such as past presidents and/or major donors and the synagogue's board) the opportunity to meet finalist candidates when they come for their onsite visits. You'll also want to provide plenty of opportunities to say goodbye to the outgoing rabbi and to meet the incoming one.
- 4. ...but don't involve senior staff and other clergy as members of the search committee.** Involving key stakeholders in the process does not mean that they should be a part of the search committee! Staff shouldn't be in a position to hire their own boss—but their insights can be helpful as the final decision is being made. Create opportunities for the finalists to meet individually with key staff members during their visits. After all, they're the ones who will be working with the new rabbi day in and day out.

5. **Find the balance between old and new.** When Temple Emanuel's beloved rabbi retired, congregational leaders wanted to maintain his institutional knowledge but also avoid making their new rabbi feel like he was in the shadows of his predecessor. Their strategy during the first year was to prioritize their new rabbi's introduction to and engagement in the congregation; during the second year, the new rabbi became more engaged with the large metropolitan community. The retiring rabbi remained available to answer questions but did so in a low-key, non-public way; he also started stepping out of most lifecycle events, aside from funerals, and including the new rabbi whenever possible so that families could establish a relationship for the future.
6. **Don't leave relationship-building to chance.** Relationship-building takes time and effort, so you can't expect congregants, staff, or leaders to feel an instant connection to the new rabbi; you'll need to invest energy into making these connections happen. Make a point to facilitate team-building exercises within the leadership and to create engagement opportunities for the entire congregation.
7. **Meet people where they are.** Not everyone will be on the same page about the change, and transition isn't about changing people's minds. The transition leaders' job is to let staff, clergy, lay leaders, and congregants know that their voices are being heard and to help them to become comfortable with the change over time.
8. **Turn to a professional.** Is your congregation undergoing a clergy transition? The Central Conference of American Rabbis and American Conference of Cantors provide free placement services to URJ member congregations, and the [URJ's transition management directors](#) are available to assist congregations through the journey of clergy transition.

#### **Additional Resources:**

1. A comprehensive resource on transition management will be issued in 2017
2. The URJ's Directors of Transition Management, [Rabbi Janet Offel](#) and [Rabbi David Fine](#) are available to assist congregations with inquiries about transition management
3. The [Senior/Solo Rabbinic Transition group](#) in The Tent

#### **Discussion Questions:**

1. If / when your rabbi retires:
  - How will it feel to you personally?
  - How do you think other members of your congregation will react to the rabbi's departure?
  - Are there some cohorts that will be more upset than others? Why? Why not?
2. In a rabbinic transition in your congregation:
  - Who has the most to lose when your rabbi leaves? Why?
  - Who will see this as an opportunity and embrace the change most quickly?
  - How do you manage the transition and bring everyone along on the journey, both those who are going to be mourning the departure of the rabbi and those who are embracing the change more quickly?

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**Rabbi Janet Offel** is the URJ's Director of Consulting and Transition Management.



## Transition Management

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### Congregational Perspective

### The Power of Having an Interim Rabbi

by Skylar Cohen

When I became president-elect of [Congregation Beth Emek](#) in Pleasanton, California, we faced an unexpected rabbinic transition. Here's how we turned our challenge into a success story.

First, the outgoing president and I consulted with Rabbi Alan Henkin, the director of the [Central Conference of American Rabbis](#) (CCAR) Rabbinic Placement Commission. The CCAR is the professional association of the Reform rabbinate and as a member of the Union for Reform Judaism, our congregation is eligible for rabbinic transition services offered by the CCAR. Rabbi Henkin gave us several options, but strongly recommended we hire an interim rabbi from among a growing group of rabbis specially trained to help congregations positively transition from one senior rabbi to the next.

The board not only approved the recommendation to engage an interim rabbi, but also decided to hire him or her for a two-year term—rather than the usual one-year timeframe. Several factors contributed to this decision:

- The timing of our rabbi's departure meant we were out of synch with the CCAR's rabbinic search cycle, and the extra year would give us some much-needed breathing room before launching the search for our permanent senior rabbi.
- We needed time as a community to prepare to welcome our next rabbi and although the interim rabbi would be with us for two years only, we understood that he or she would not be eligible to apply for our permanent position.

We quickly formed a search committee that got right down to work to find the rabbi best suited to lead us through our transition. Because our congregation had not had a rabbinic transition in many years, we learned a lot along the way: how to form a search committee that is representative of the congregation, what questions to ask candidates, what gets included in the rabbi's contract, and how best to negotiate all those details. Although [the URJ provided support](#) and the Rabbinic Placement Commission provided guidance, we needed to make these decisions ourselves, in light of our congregation's governance style (or lack thereof) and culture. Perhaps the hardest lesson we learned is that a rabbinic search is not a "one size fits all" process.

After an intense three-month search process, we welcomed Rabbi David Katz as Beth Emek's interim rabbi in the late summer. He hit the ground running, not only dealing with our transition issues, but also—and more importantly—as our rabbi, officiating at lifecycle events, teaching, and leading services. Although he would be with us only temporarily, his commitment to the congregation was complete, and any concerns that he was the "substitute teacher" while we waited for our "real" rabbi were quickly allayed. In fact, we saw an increase in engagement among members during the interim period.

It also allowed us to assess our priorities, values and identity, separate from our relationship with a specific rabbi. We could evaluate changes in ritual and programs, as well as challenge assumptions and the status quo. In some areas, we opted to maintain the status quo during the interim period. For instance, we deferred the decision about adopting the new *machzor* (High Holiday prayer book) because we felt the new rabbi should be involved in the decision. In other

cases, we used the opportunity to make some changes we knew might be controversial or unpopular. To his credit, Rabbi Katz was willing to take the heat on them.

We were concerned, of course, that congregants would get attached to the interim rabbi and, in fact, many people did—myself included. But that was a good thing. Like any “summer romance,”—which is how I think of the relationship—we knew from the start it wouldn’t last, but that we’d have an opportunity to say graceful good-byes. At the end of the two-year term, I was touched by the outpouring of affection, especially from people who, when our longtime rabbi left, swore they would never like another rabbi again. Most of all, our summer romance gave us time and space not only to conduct an effective search for our new senior rabbi, but also to create a neutral environment within the congregation in which the incoming rabbi would have an opportunity to succeed on his own merits.

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**Skylar Cohen** is the past president of [Congregation Beth Emek](#), in Pleasanton, CA. She serves on the North American board of the Union for Reform Judaism and as chair of the URJ San Francisco Bay Area Community.



## Reimagining Financial Support

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### Sacred Giving: How Reform Congregations are Reimagining Financial Support

by Amy Asin

Nearly every congregation today faces the challenge of trying to increase or stabilize revenue, so it's no surprise that the Jewish is continuously publishing on this topic:

- *eJewishPhilanthropy* shared [an overview of the changing landscape](#) and what that may look like for particular synagogues. They explain the traction this issue has been gaining, calling on the expertise of researchers and advocates for change.
- In “The Case for Pay-What-You-Can Synagogue Dues” on Jewish parenting site *Kveller*, one blogger wrote [a personal reflection about the many factors that families consider](#) when weighing the cost and benefit of joining a synagogue—and why the potential upside for congregations seems worth the risk.
- The *Sun-Sentinel* reported that Temple Beth Orr of Coral Springs, FL, [became the first congregation in South Florida](#) to adopt a voluntary dues commitment model.

And that's not all. *SYNERGY*, a partnership that “seeks to strengthen synagogues as vital centers of caring, learning, and spiritual renewal,” published a report titled [“Are Voluntary Dues Right for Your Congregation?”](#). It has been downloaded by many congregational leaders, making it clear that they are in search of reliable resources to help them explore these issues within their own unique communities.

These articles are representative of the discussions happening on an organic, grassroots level, too. In fact, a search of the word “dues” in *The Tent*, the Reform Movement's online forum for congregational leaders, results in a myriad of conversations and files, as well as two dedicated groups about this subject.

It's inspiring to see so many Jewish communities engaging in conversation, experimenting, and trying new strategies. To further the conversation and provide congregations with a tangible resource, the Union for Reform Judaism published [Reimagining Financial Support for Your 21st Century Congregation: A Report from the 2013–2015 Community of Practice](#). This interactive resource provides tools for congregations to begin this work by codifying the findings of our pilot Community of Practice (CoP) on Re-Imagining Financial Support for your Congregation. This CoP engaged 17 congregations in conversation and innovation in their dues structures. Some communities tried voluntary dues structures, while others took varying approaches to revenue collection.

[Reimagining Financial Support](#) details 10 of the best principles derived from these congregations and research into alternative revenue collection. These 10 concepts, which any congregation should consider when reimagining financial support, include such tactics as focusing on engagement, recognizing distinct segments of the population, removing barriers to entry, and aligning any new financial model with the congregation's vision and values.

Though no one best principle dictates the right approach for any one congregation, thinking through the implications of each will help determine a starting point. Three very different examples illustrate this point:

1. [The Temple, Congregation B'nai Jehudah](#) in Overland Park, KS, focused on reducing as many barriers to entry to congregational engagement as possible. The proceeds from selling the congregation's urban synagogue building and instead making its suburban location the congregation's permanent home made it possible to do away with its customary upfront building fund. In addition, members who now request dues relief will no longer be required to submit their tax information (which don't give any indication of fixed expenses) or fill out a myriad of forms; instead, they have a friendly conversation with the executive director or a member of the board, who expresses how important the member is to the community and asks what they can do to make membership affordable for them.
2. [Congregation Shir Hadash](#) in Los Gatos, CA, realized that their problem was not their financial model but the way they talked about it – so they changed course. To top donors, they expressed appreciation and then, after reviewing the congregant's giving history and the impact it made on the congregation, offered the opportunity to make a single annual commitment rather than receiving multiple appeals throughout the year. The majority of top donors took advantage of the opportunity, and total commitments increased by 20% from the previous year. The congregation also targeted a middle tier by identifying their “sustaining amount,” dividing their total operating budget by the total number of members, and encouraging those whose past contributions were near that amount to increase to that level. Finally, recognizing that not everyone can give at the same level, they implemented an “every dollar counts” approach to acknowledging that, as long as a congregant makes a gift that is meaningful to themselves, it is meaningful to the congregation, as well.
3. As part of their communication strategy, Congregation Shir Hadash also revealed to congregants that the synagogue was paying \$25,000 per year in credit card fees, and then urged members to begin paying by check rather than credit card. Making financial matters of the congregation more transparent to everyone in the community helps establish a foundation of trust. When the congregational budget and major financial decisions are visible to everyone, congregants gain a better sense of how their dues or philanthropic gift makes a difference to the health and sustainability of the congregational community. It can also lend credibility both to specific requests for support and to the case that leaders make for changing the financial support system.

#### **Additional Resources and Discussion Questions:**

- [\*Reimagining Financial Support—A URJ Resource\*](#)

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**Amy Asin** is the URJ's Vice President and Director of Strengthening Congregations.



## Reimagining Financial Support

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### *Congregational Perspective*

### Relational Judaism: How Building Community Helped Us Change Our Dues Model

by Dani Robbins

My career has taken me to multiple cities in several states, and each time I've moved, I've looked for a new religious home by calling around to local synagogues. I found it off-putting, however, when the people on the other end talked to me about money before they welcomed me or invited me to visit. By the third or fourth call, I had a bit of a chip on my shoulder about the way our congregations welcome prospective members.

Imagine my delight, then, in learning that my current congregation, [Congregation Beth Tikvah](#), was considering changing its dues model—really turning it on its head. I've been reimagining the financial future of Jewish congregations for years, so I was thrilled to participate in the congregation's efforts to do so.

For years, Congregation Beth Tikvah, which was founded upon and employs egalitarian values in all its endeavors, has been moving toward a relationship-based model—one in which the congregation builds a community of enhanced relationships, both among members and with the congregation, moving away from fee-based dues and tickets. Although we didn't know it at the time, relational Judaism was the lens we used when we eliminated the committee that approved dues reductions, selected our new rabbi, and began to consider whether a new funding model was right for us.

Upon his arrival in 2011, Rabbi Rick Kellner helped us put relational thinking at the forefront of our actions and vocabulary, and encouraged us to adopt it within our community. Under his leadership, we expanded programming for young children and seniors, and finished building a new sanctuary and social hall that had begun before he arrived. Both efforts attracted new families, and our community grew.

Along the way, we found that our existing financial model no longer fit our needs. Eager to learn about alternatives, when the URJ announced its new [Community of Practice](#) (CoP), Reimagining Financial Support for Your 21st-Century Congregation, we signed on. Launched in March 2013, the CoP enabled us to learn from one another, other congregations, and experts brought in by the URJ. Ours was one of 17 congregations in the two-year guided program, which included an in-person gathering, periodic webinars, individual check-ins, and shared resources.

Our CoP committee explored various financial models. We looked at our congregation's history and culture. We discussed definitions of “dues,” “member,” and “transaction.” We challenged, argued, and debated each other, ultimately building consensus. Though we started out talking about money, we ended up talking about community. We studied congregations that implemented new models, reading their literature and interviewing their members. We talked about who we wanted to be and to what kind of community we wanted to belong. We held formal and informal gatherings to engage constituents. We wrote letters and articles. We sought and received feedback.

We learned that promoting engagement and providing connections among members are more vital than any funding discussion possibly could be. In fact, at one point, we committed to changing our language, and now are moving toward

deepening relationships and engaging with each other, our congregation, and our faith. Our goal was no longer about changing congregational dues models; it was—and is—about changing our congregational culture. Finally, we made formal recommendations to our board, and presentations to our fellow congregants, received suggestions, and revised our recommendations accordingly.

It was daunting, nonetheless, to recommend a process that potentially would allow people to participate in our congregation without supporting it financially. We knew various outcomes were possible: we could lose significant income, gain significant income, lose income but gain members, or lose members but gain income (though we all doubted that this last possibility would come to pass). We trusted that if we created a place and a space in which everyone belongs, something magical would happen, and everyone would, indeed, feel like they belong.

So we jumped, and the net appeared.

Our plan included changing our language to change our culture, evolving from the word “dues” to the term “membership commitment.” Importantly, we provided guidance about the annual costs to sustain programming, as well as how people could give below, at, or above that level.

What happened? Some people gave less, and some people gave nothing but still joined, which also was part of the goal. Some people gave more, and some gave a lot more. One thing is for sure: We’ve left the transactional model behind. No one who calls our congregation to inquire about joining is told about dues.

We’re not finished yet. Our movement toward relational Judaism laid the foundation for a culture of philanthropy that will continue to evolve. It remains to be seen whether we will need to introduce a more formal process to engage donors. For now, though, it’s safe to say that our committee is delighted with where we are and where we’re going. We are currently just one family shy of last year’s membership numbers, with almost exactly the same income. We did it!

We changed our words. We changed our culture. But we didn’t change our income.

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**Dani Robbins**, a nonprofit leadership consultant, is part of the Reimagining Financial Support Community of Practice Committee at [Congregation Beth Tikvah](#) in Columbus, OH.



## Engaging Congregants

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### How Your Congregation Can Transform Life for Its Members

by Rabbi Esther Lederman

In 2013, four visionary congregations—[Central Synagogue](#) in New York, NY, [Temple Emanu-El](#) in Dallas, TX, [The Temple](#) in Atlanta, GA, and [Congregation Emanu-El](#) in San Francisco, CA—began to work together, in partnership with the Union for Reform Judaism, on a new strategy and vision for congregational life. That vision centers around “small groups,” a concept adapted for our purposes from the world of mega-churches.

Temple Emanu-El in Dallas articulated the vision this way: “Imagine hundreds of Temple members gathering regularly in small groups to learn and laugh, to rest and rejuvenate, and to deepen connections to one another, to the congregation, to the Jewish people, and to the rhythms of Jewish time and life.”

What exactly are small groups—and how do they help us reimagine congregational life?

Small groups (fewer than 15 people) focus on the lives and significant concerns of a congregation’s members. Organized around topics of shared interest, similar life stages, and neighboring geographies, small groups feature shared Jewish experiences, learning, and celebration, and are guided by lay leaders. The groups meet regularly, and shared accountability among members is high.

In some ways, small groups are an incarnation of *chavurot* (friends, literally, who gather for Jewish worship, learning, and lifecycle events), but they have two distinct differences:

1. **Small groups are meant for every member in the congregation.** In many congregations in which *chavurot* have developed, they are seen as something in which only a small sub-section of the congregation will engage. The vision for small groups is much larger. As Rabbi Peter Berg from The Temple in Atlanta aptly said, “I want every person in this congregation to be part of a small group.”
2. **Small groups are a philosophy, not a program.** They are not meant to be another “program” the congregation adopts, but rather are designed to reshape the way we think about everything we do in the synagogue world. Congregations successfully using this model are rethinking their membership engagement strategies with an eye toward making all areas of synagogue life—from Torah study to scholar-in-residence initiatives and from worship to social action—more relational. As one leader explained, “We are trying to move synagogue membership from a business transaction to an emotional investment.”

These stories exemplify how small groups can transform congregational life.

1. **Small groups create paths to congregational leadership and engagement.** According to Rabbi Lydia Medwin, traditionally there were three ways to becoming a leader within The Temple in Atlanta: become the rabbi, join the board, or chair a committee. Thanks to small groups, there are now 48 different ways to lead, and there will be more as the number of small groups grows.
2. **Small groups enrich relationships among congregants.** When Temple Emanu-El in Dallas’ community garden members participated in an early pilot of a small group, a longtime congregant had this reaction: “I thought I knew these people. I had been gardening next to them for years. It turns out I knew nothing about them. Today, I feel much closer to them; we have supported each other through periods of mourning with meals made from the garden’s produce, shared hilarious moments of camaraderie, and developed meaningful spiritual practices.”

**3. Belonging to a small group becomes the most meaningful aspect about synagogue membership.** At Central Synagogue in New York City, a member of the 20-somethings small group, whose members typically are in a transient stage of life, spoke volumes about the work of small groups when she said, “I’m going to miss New York City and the great things about this place. But the hardest thing is leaving my small group.”

Using a collaborative model similar to the one the first innovating congregations used to develop their small groups, including the curricula and training that helped make the groups successful, in 2016 we began working with 19 additional congregations of various sizes across North America in a [URJ Community of Practice on Engaging Congregants through Small Groups with Meaning](#). Not only is this work generating tremendous energy, but also transforming congregations into the focal point of meaning and relationships in people’s lives. It is making the impossible seem realistic for all. Indeed, I am energized when I think about what congregations may look like with a small group mindset at their core.

#### **Additional Resources:**

1. [Temple Connect Leaders Packet](#)—A resource packet courtesy of The Temple, Atlanta, GA
2. [Temple Connect Pocket Guide for Leaders](#)—A resource packet courtesy of The Temple, Atlanta, GA
3. [Sh'ma Emanu-El](#)—An online introduction to small groups by Temple Emanu-El, Dallas, TX
4. [Front Porch](#)—An online introduction to small groups by Temple Emanuel, San Francisco, CA

#### **Discussion Questions:**

1. Think of a time in your own life when being part of a small group (at work, at camp, at school, in synagogue) had an impact on you:
  - What was the impact?
  - Why was being part of the small group successful?
  - What were some of the characteristics of the group that gave it its impact?
2. Is there an example of a “small group” in your congregation that is deepening connections between members, to the community, and to Jewish wisdom and tradition?
  - What makes it successful?
  - How could you replicate the impact of this group to other areas of synagogue life?
3. Imagine for a moment, hundreds of your congregants in small groups.
  - What is the story your congregants would tell about the meaning and impact those groups are having on them, their community, and their connection to Jewish wisdom and teaching?
4. Each of these groups started small—with a particular population. Who would you start a small group experiment with?
5. *For small congregations in particular:* What resources might you want or need in order to be able to consider starting small groups in your congregation?

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**Rabbi Esther Lederman** is the URJ’s Director of Communities of Practice.



## Engaging Families with Young Children

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### 4 Ideas for Engaging Families with Young Children in Jewish Life

by Cathy Rolland, RJE

Every new parent understands the pressure and stress associated with finding the best ways to create a rich and fulfilling future for their children. Faced with societal expectations, money constraints, and more programmatic opportunities than ever for their young ones, Jewish life may not always make it to the top of the priority list.

As a part of the Union for Reform Judaism's [Communities of Practice](#) work, we're partnering with congregations (both those with and without preschools) to further and more effectively engage families with young children in congregational life. The full results of this work can be found in a URJ resource, [Engaging Families with Young Children](#). Here's a look at some of the best principles:

#### **1. Engagement is a congregation-wide activity, not an isolated program or department.**

Engagement must be a true value of the entire congregation, including those in leadership positions. To sustain any effort to build a community of parents with young children, congregational leadership needs to fully support these efforts, ensuring that holidays, programs, and services focus on the idea of family.

At [Temple Emanu-El](#) in Utica, N.Y., leaders initiated a number of changes that add up to a large impact for parents. They installed a changing table in the restroom, created a musical family service and dinner once a month before congregational services, began holding family *Havdalah* events and playgroups, and reconfigured the youth committee to include parents of kids up to age 18. They're also involved in the community PJ Library® program operated by the local JCC. The rabbi, herself a young mother, has developed relationships with the other parents in the community, and parents have come to share responsibility for congregational programming. In two years, participation rates have more than doubled. Just as parents make their homes “kid-safe” before bringing children into the world, so must congregations create spaces for families that foster the understanding that they're supported by an entire community.

#### **2. Focus on engagement, not enrollment.**

Community isn't measured by how many people attend a program but by the quality and depth of the relationships between people in attendance. Your congregation can host 100 great programs a year, but if no meaningful relationships exist between the congregation and its community members, nobody benefits from great programming. [Temple Beth El](#) in Charlotte, N.C., [has taken engagement to a new level](#) by building The Porch, a community of young adults and parents, whose name symbolizes the hospitality and neighborliness of the South. The Porch offers a variety of weekly and monthly activities, including some for adults/parents only, some for parents to enjoy with their children, and others for the whole community together. Parents appreciate the opportunity to engage with a community of peers, and regular participants now take responsibility for planning a weekly Torah study group that meets at Whole Foods. When congregations form relationships with families with young children, they create a community for today *and* for the future.

### 3. Do your research to figure out what young families need.

Rather than focusing on what families with young children can contribute to the synagogue, synagogues need to see themselves as having something to offer those starting their parenting journey. Synagogues must be intentional in their efforts to meet parents' needs, and that begins with knowing what those needs are. The last 10 years have yielded a wealth of national research into families of Jewish children, and it's equally important to know about local trends. What venues or activities are popular for these families in your community? Where do people go for information about local community life? Which organizations currently serve this cohort well? Lisa Farber Miller of the [Rose Community Foundation](#) says, "Providing services for parents with young Jewish children presents a rare opportunity for synagogues to be relevant to young families who are looking for places to spend their child-related dollars." Synagogues can provide inspirational Jewish experiences that engage families in meaningful ways from an early age—if they truly see it as their congregational mission.

### 4. Experiment and reflect—then do it all over again!

Congregations that have made significant strides in engaging families with young children are those that have created a culture of experimentation and reflection, where risk-taking is both supported and encouraged. The early childhood education director at [Temple Sinai](#) in Summit, N.J., wanted to do something new to engage families with young children: a Pajama Tot Shabbat. The congregation involved all of their stakeholders in the decision process, from teachers and early childhood families to clergy and lay leaders, and though some initially expressed concern that pajamas in the sanctuary would show a lack of proper decorum, Pajama Tot *Shabbat* was a great success representative of collaborative preparation. During the reflective conversation afterwards, the rabbi encouraged the director to schedule more such events—and even offered to wear his own pajamas! The whole community discovered the importance of staying true to the synagogue's mission while providing families with high-quality, innovative experiences and accessible, relevant Jewish content.

#### **Additional Resources and Discussion Questions:**

- [Engaging Families with Young Children—A URJ Resource](#)

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**Cathy Rolland**, RJE, is the URJ's Director of Engaging Families with Young Children.



## Engaging Families with Young Children

### Congregational Perspective

### Why We Closed Our Synagogue's Preschool and Started Over from Scratch

by Rachel Stein

As a former preschool teacher and director, I was enjoying my role as a parent and lay leader on the “other side” in our preschool at [North Shore Congregation Israel](#) in Glencoe, Illinois. As my two boys happily made their way through our small preschool, I chaired the parent committee and volunteered on our early childhood task force, which explored ways to expand the school and reach target families, many of whom were sending children to other area programs.

In the midst of this work, we were invited to join the URJ's [Community of Practice](#) (CoP) “Pursuing Excellence Through Your Early Childhood Center,” and we headed off to the kick-off retreat, where we met other professional and lay leaders working through their own programmatic challenges and successes. As we contemplated the next steps for our preschool, several points resonated with us:

- Get families in the door before their child turns 2 years old.
- Meet families where they are.
- Sometimes it's best to dive in and take a risk. Don't overthink it, just do it!

Following the retreat, we spent one more year attempting to keep our diminishing program afloat before we decided to close the school and find other ways to engage families with young children. As difficult as this decision was, it opened doors to new, innovative, and exciting programming.

Working with our director of education, we applied for and received a mini-grant from Chicago's [Jewish United Fund](#) (JUF) that enabled us to offer a free, drop-in program for children up to 2 years old—and their caregivers—at a local bookstore one Friday a month for four months. Our main goal was to create an opportunity for parents of young children to connect with one another, which we believe is at least as important as (if not more important than) connecting with the congregation.

We advertised this new offering rigorously on social media, in ads in local newspapers, and on websites geared to families with young children—and then, on that first Friday, I waited in the bookstore with Susan, our newly-hired program coordinator, and wondered whether anyone would show up. Twelve participants showed up to that first event, and by the fourth class, we had 25 toddlers. We'd outgrown our space in the bookstore!

Each session focused on an upcoming holiday or *Shabbat*, and included age-appropriate songs, sensory activities, art, stories, and more. Rabbi Lisa Greene, playing her guitar, sang with the kids before they headed home, each clutching a children's book related to the holiday that had been highlighted in the session. Holding the class beyond the walls of the synagogue helped us meet people where they were, and attracted non-members who, unfamiliar with the building, might have been intimidated about attending an event there.

An online survey told us that, after having made social connections with other participants, as well as with Susan and me, the class's adult participants were interested in additional sessions, even if the program were to be held within the synagogue walls. We've now been running this free program for more than a year, mostly at the synagogue, and we still pack the house each month, both with "regulars," who greet each other with hugs, and with drop-ins, who come when they can and often bring friends. Perhaps most telling is the chatting among the parents, who talk about going out to lunch together after the class and ask if they will see each other at our tot High Holiday services and other synagogue programs.

In fact, building on the momentum created by this class and its participants, Susan has created a series of other free-of-charge classes for this cohort, including an art class for 2- and 3-year-olds and a Sunday morning movement class for dads and tots, which is also funded by a JUF grant. We initially thought our need to charge for the art class—to cover the cost of the materials—might be a barrier, but we were pleased to learn that through our other high-quality program offerings, we had established trustworthy relationships with participants, who were happy to pay and keep attending!

In summer 2015, we hosted two family programs: a Friday night Shabbat picnic followed by a movie screening on the lawn, and a Sunday afternoon event at a local pool. Thanks to that first bookstore event, many families who never would have walked through our doors now have real roots in our synagogue. Indeed, the connections and relationships keep growing—from synagogue to family, from family to Jewish learning, and from family to family.

What more could we ask for?

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**Rachel Stein**, who holds a master's degree in child development, serves on the youth and family community committee at [North Shore Congregation Israel](#) in Glencoe, IL.



## Engaging Families with Young Children

### Congregational Perspective

### How Tots Helped Our Small Congregation Grow

by Harriet Skelly

In 2013, [Congregation Shir Ami](#) in Castro Valley, CA, was at its lowest membership in 15 years. Several years earlier, we had implemented a new, low-cost dues structure in the hopes that it would help increase the membership. At about the same time, Rabbi Rick Jacobs, president of the Union for Reform Judaism, visited the Bay Area and spoke with local congregational presidents

about audacious hospitality, relational Judaism, and “going outside the walls.” I was intrigued by his language, but still didn’t really get it. I was just stuck on how to find unaffiliated Jews in our area to bring into our congregation.

A few months after the meeting with Rabbi Jacobs, I was manning Shir Ami’s booth at the Castro Valley Pride Festival when an interfaith lesbian couple with a nine-month old son approached me. As we chatted, I learned that they were looking for a place to bring their son to learn about being Jewish—but sadly, I had to tell them we didn’t have programs for children under age 5.

I encouraged them to come check us out anyway and gave them our schedule of activities, but right there and then—as they walked away from the booth—I decided that our congregation had to create something for families like theirs.

That encounter led me to understand that, as an aging community with very few students in our religious and Hebrew school, our congregation needed to attract families with young children. In September 2013, I learned that the URJ was forming [Communities of Practice](#) (CoP), bringing together members of various congregations for 18-24 months of guided learning around congregational change on a topic of shared interest. Shir Ami was accepted into the Community of Practice that focused on engaging families with young children. At the time, we had 49 member families with nine school-aged children, and we wanted to learn how to attract unaffiliated and diverse families with young children.

After meeting that young family at the Pride Festival, I’d been tossing around the idea of offering a free, monthly program for children under 5 and their parents or guardians. In addition to being fun and educational, it would provide a peer group for young families and – perhaps most significantly—get them in our doors. I invited one of the membership co-chairs to join me in this experiment, and after attending the CoP kickoff in Chicago, she presented what she’d learned to Shir Ami’s board of directors.

Although the board was hesitant to offer anything for free—that was *really* thinking outside the box!—they gave us their blessing to implement the program I’d envisioned. For starters, we asked a few members who are parents of young children to brainstorm with us. As a result of those sessions, Tot Talk was born.

Held once a month, Tot Talk is scheduled for a Sunday when religious school is in session and a rabbinic intern is present (we don’t have full-time clergy at Shir Ami). The one-hour session starts at 11:30 a.m., the time the school breaks for oneg, which lets the tots interact with the big kids, and lets their parents check out the environment and mingle with each other before the session officially starts at about 11:45 a.m. Parents and guardians are required to participate with their children in the session, which usually includes a welcoming song, a read-aloud story tied to the theme of the day,

and a hands-on project—usually making something edible! At the end of the session, every family leaves with their project and a handout that includes information about the session’s topic and links to related topics (we get a lot of our ideas from [ReformJudaism.org](http://ReformJudaism.org)).

The first family to attend Tot Talk in January 2014 was the interfaith family I’d met a few months earlier at the Pride Festival! Since then, tot participants have ranged in age from nine-months to 4 years in any given session, and six of the participating families have joined our congregation. This effort has boosted our membership to 65 households, with 17 students (excluding the Tot Talk children) enrolled in our religious school.

I attribute some of this growth to the Tot Talk program itself. The rest I attribute to the CoP, which is where we learned to market the congregation (using the URJ’s free marketing materials), advertise our programs on our website’s home page, and go “outside the walls” to meet people where they are. Although we know that potential congregants are not just going to show up on our doorstep, when they do, we’ll greet them with audacious hospitality!

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**Harriet Skelly** is president of [Congregation Shir Ami](#) in Castro Valley, CA.



## Engaging Youth

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### 9 Principles to Help You Engage Jewish Youth

by Michelle Shapiro Abraham and Miriam Chilton

In 1924, educator Joseph L. Baron shared with the Chicago Rabbinical Association his plans for creating “clubs” to engage youth in Reform Jewish life and supplement the existing education-focused programs:

*“Jewish Youth...want adventure, want romance, want the heroic... To enthuse the young with the idea of helping in the creation of a new people, to invest them with immediate duties toward that end, to show them where Judaism is not academic but vital and urgent and immediate, that is a means of arousing souls and installing new fervor in dry bones... And perhaps because of this, [these clubs] will strive with force into the sensitive heart and thirsty souls of our youth.”*

Our journey to engage young people in compelling Jewish life is not new. As Dr. Gary Zola notes in [The Founding of NFTY and the Perennial Campaign for Youth Engagement](#), since the establishment of liberal Judaism there has been “a persistent concern that the American synagogue might become irrelevant to the rising generation of Jewish youth.” And yet, it is this very concern that keeps Judaism relevant, urging us to continue reimagining it.

In 2011, the Union for Reform Judaism launched the [Campaign for Youth Engagement](#), designed to inspire more young Jews to embrace Jewish life as a path to meaning, purpose, and joy. These nine guiding principles were developed by professionals in numerous congregations—[Congregation Beth Or](#), Maple Glen, PA, [Congregation Beth Israel](#), West Hartford, CT, and [Temple Emanuel](#), Greensboro, NC, among others—in our collaborative work with them. We share them with congregations and use them to inform our own ongoing efforts to develop new camps and year-round programming.

- 1. Talk to kids before they become teenagers.** It is much easier to engage teens who already have had positive Jewish learning experiences. Building relationships prior to b’nai mitzvah can be the key to continuing them. Reinvent religious school curriculum, create social opportunities, or engage families together. Consider having an “aspirational arc,” where younger teens can see what older teens are doing, as is the case with campers who look forward to being camp counselors someday.
- 2. Cultivate a safe environment.** Programs are not enough. Successful organizations focus on relationships and creating a space for teens to explore identity, make friends, and feel valued as individuals.
- 3. Make it age-appropriate.** We often lump 9th to 12th graders together, but they are in very different places both psychologically and emotionally. Keep these differences in mind when building programming strategies.
- 4. It takes a team.** Yes, it’s vital to have a committed, charismatic rabbi who can relate to our youth, but a successful strategy depends on more than one person. More adults in youth engagement, including professionals, lay leaders, camp staff, college students, and parents, means more youth participants.
- 5. Listen to your teens.** Too often we discount what teens themselves ask for, but many organizations are exploring new avenues for inviting them to be co-creators. Bringing audacious hospitality to their level not only mean welcoming them, but also allowing them to mold the experience to fit their needs.
- 6. Offer varied options.** We need to recognize that one size does not fit all and broaden programmatic menus to include deep engagement opportunities such as confirmation classes and years at camp and lighter opportunities such as social outings and afternoon activities. Some offerings will attract a wide audience; others will appeal to smaller groups.

7. **Consider partnerships.** Offering many engagement options can be daunting. Collaboration (and reimagining “competitors” as allies) can allow us to do more, in smart and financially sustainable ways. Alternately, simply recognizing the myriad offerings available can help expand your options. Congregations are experimenting by being “connectors,” helping teens find the right program and then helping them reflect on what they learned.
8. **Engage parents.** Even as teens try to differentiate themselves from their parents, they also continue to be influenced by them. In a recent study, [Generation Now: Understanding and Engaging Jewish Teens Today](#), the majority of teens spoke about their families’ positive influence in enabling them to make life choices, including those related to being Jewish. Such studies highlight the importance of engaging and supporting teens—early and frequently.
9. **Keep content relevant and “real.”** We must ensure our offerings meet young people where they are and fulfill their need to help make the world a better place—one of our core values as Reform Jews. Our teens are seeking leadership opportunities that will be relevant in other aspects of their lives. Some congregations connect teens to roles as madrichim (classroom assistants), b’nai mitzvah and confirmation tutoring opportunities, youth group mentorships, and leadership positions in summer programs.

#### **Additional Resources:**

1. [Finding Youth Engagement Under the Table](#) by Rabbi Dena Shaffer
2. [The Values of Our Teens’ Time](#) by Becky DePalma

#### **Discussion Questions:**

Consider using this piece in your next board meeting with the following activity:

1. Think of a time in your life (ideally as a child or teen) when you were part of a moment or experience that was adventurous, romantic, and heroic, which showed “Judaism as not academic but vital, urgent and immediate.” A moment that “aroused your soul.”
  - Where were you and what happened?
  - What made the experience so powerful?
2. Reflect on the experiences that your group shared in relation to this article.
  - Do any of the stories illustrate one of the principles in the article? How?
  - Which of these principles do you find most compelling?
  - Which of these principles do you find most challenging?
  - How do these principles add to your understanding of how to engage youth?
3. Read together the two articles in the additional resources section. As you read each article, consider:
  - What is compelling about these models of youth engagement?
  - What is challenging about these models of youth engagement?
  - Which of the nine principles are at play in these models?
4. Think about the programs your congregation currently offers to engage youth.
  - Which of the nine principles are already at play in your programs?
  - Which principles are not at play, but are compelling to you?
  - What would be some opportunities to use these additional principles in the work that you do?  
What would it look like to use these additional principles in each of these opportunities?

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**Miriam Chilton** is the URJ’s Vice President of Youth.



## Engaging Youth

### Six Areas of Incredible B'nai Mitzvah Innovation

by Lisa Langer, RJE, and Rabbi Laura Novak Winer, RJE

What do we want students to say and do as they prepare for and mark *b'nai mitzvah*? How do we want them to experience this part of their Jewish journey? For the last three years, the [URJ B'nai Mitzvah Revolution](#) has supported more than 150 congregations in asking and answering these questions, spurring congregations to experiment in areas that inspire *b'nai mitzvah* students to express what matters to them in the experience.

Here are six areas of innovation:

#### 1. Repairing the World

At this age, students have a growing awareness of the world around them and want to play meaningful roles in making it just and whole. [Congregation Solel](#) in Highland Park, IL, engages *b'nai mitzvah* students in projects that reflect their interests and questions and that relate to the values reflected in the Torah portion they will read. The *Mitzvotainu* program at [Reform Congregation Keneseth Israel](#) in Elkins Park, PA, introduces fifth-grade students to the congregation's existing social action activities, then asks sixth-grade students to volunteer with one of the projects multiple times as preparation for planning a project of their own.

#### 2. Innovative Rituals

The typical *b'nai mitzvah* service is filled with ritual and meaning, serving as a peak Jewish experience for many families. In fact, though, there are many other moments throughout a young person's Jewish journey that are ripe for ritual. By recognizing and ritualizing them, we can contextualize *b'nai mitzvah* as one special time among many within a lifetime. [Temple Beth Elohim](#) in Wellesley, MA, has done this with *Milestones*, which celebrates key moments in the learning process, beginning with consecration. Students receive a *siddur* at the end of third grade, a *Tanach* at the end of fourth grade, and a yad at the end of fifth grade; each milestone is marked with ritual and celebration.

At [Congregation Beth Ahabah](#) in Richmond, VA, each *b'nai mitzvah* family is invited to meet the rabbi on the *bimah* one year before the child's service for a special ritual that marks the beginning of the formal preparation process. Parents bless their child, and the child blesses his or her parents, a ritual that reframes preparation from a set of mundane tasks into the realm of the sacred. Such innovative rituals enrich families' lives by giving pause to mark sacred moments and acts with meaningful ceremonies.

#### 3. Participating in Community

Emerging adolescents are working to develop their identities and find their unique place in the world. Some innovations encourage students to share themselves with the community, weaving their interests and questions into every aspect of the *b'nai mitzvah* experience. Some clergy encourage creative interpretations of Torah through painting, dance, sculpture, drama, game shows, or comics, designing and exploring individual learning plans tailored to each child.

At [Congregation Bet Ha'am](#) in Portland, ME, *b'nai mitzvah* students bring questions about a Torah portion to their individual meetings with the rabbi, who uses these questions to determine which verses the student will read. The rabbi also responds to one of these questions during the *b'nai mitzvah* service, personalizing the teaching to the individual student while also offering learning with depth and meaning for the general congregation.

#### 4. Becoming an Adolescent

The process of becoming an adolescent impacts both the child and his or her family, and as such, Jewish communities seek ways to support teens and adults as they move through this phase of life. *B'Naiture* at [Wilderness Torah](#) uses nature as a vehicle for exploring transition from childhood to adolescence, linking it all to Judaism. [Oak Park Temple B'nai Abraham Zion](#) in Oak Park, IL, offers a 15-week class for sixth graders and their parents to learn about Judaism and Jewish life.

#### 5. Mentoring

*B'nai mitzvah* preparation offers a unique opportunity for young teens to build relationships with older teens and adults, incorporating mentoring as an important feature in the *b'nai mitzvah* experience.

At [Temple Adat Elohim](#) in Thousand Oaks, CA, post-*b'nai mitzvah* teens tutor and guide younger students throughout the *b'nai mitzvah* process. At [Har HaShem](#) in Boulder, CO, research revealed that the tutor/student relationship is one of the most powerful experiences for *b'nai mitzvah* families. Through intense training and careful matches, tutors build meaningful relationships with students as they nurture skills, beliefs and a sense of belonging, responsibility and agency.

#### 6. Family Engagement

Parents are the most powerful role models, and family engagement in Jewish life—including the *b'nai mitzvah* process—makes a strong impression on children and adults alike. Many congregations include family retreats as part of *b'nai mitzvah* preparation as a way to build community and share experiences among a cohort. [Central Synagogue](#) in New York City provides families with a special journal for tracking their Jewish journey. They also share a *B'nai Mitzvah Brit* that specifies the values and responsibilities of all parties involved in the *b'nai mitzvah* process.

##### Additional Resources:

1. [The URJ \*B'nai Mitzvah\* Revolution Innovators Map](#)—An online gallery of *b'nai mitzvah* innovations
2. [Innovative \*B'nai Mitzvah\* Rituals](#)—A URJ *B'nai Mitzvah* Revolution webinar
3. [B'nai Mitzvah that Respond to Individual Needs and Interests](#)—A URJ *B'nai Mitzvah* Revolution webinar
4. [Taking the Torah Home at Kol Tikvah](#), *eJewish Philanthropy*
5. [Students Connect with Growing \*B'nai Mitzvah\* Revolution](#), *Jewish Journal*

##### Discussion Questions:

The six areas of innovation outlined in this article can also be seen as six purposes. Discuss the six areas of innovation:

1. Which areas of innovation, or purposes, make the most sense to you in connection with your vision for *b'nai mitzvah*?
2. Which areas of innovation, or purposes, does your congregation focus on?
  - How well are these purposes being met?
  - What's working and what's not working toward meeting each purpose?
3. Which of the areas of innovation, or purposes, are not a focus in your current *b'nai mitzvah* process?
  - Does this seem like a gap you want to address?
  - Why or why not?

4. Which of the following would you want to explore?
  - Enhancing what you are already doing towards furthering one of the areas of innovation.
  - Focusing on an area of innovation that is not currently being addressed.
5. Determine the 1-2 areas of innovation that you want to explore.
  - What are they?
  - Discuss how they align with your vision.

If you would like to delve into this even more, the URJ *B'nai Mitzvah* Innovators Map provides a [full discussion guide](#).

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**Rabbi Laura Novak Winer**, RJE, is the Los Angeles cohort senior project manager of the B'nai Mitzvah Revolution.



## Engaging Youth

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### Congregational Perspective

### Finding Youth Engagement Under the Table

by Rabbi Dena Shaffer

There's an old Hassidic story about a prince who is convinced that he is a rooster, and therefore takes off all his clothes and refuses to eat unless he may do so from underneath the king's table. After inviting many experts in child rearing (whose advice fails to make an impression on the prince), the king finally calls upon the local rabbi. Much to everyone's surprise, the rabbi too crawls under the table and eats a meal there with the prince. After some time he says to the prince, "hey, did you know that roosters can wear clothes if they want?"

"Oh good," replies the prince and pulls his sweater over his head, "I was getting cold under here." After a few more minutes the rabbi continues, "Did you know that roosters, too, can eat at the table if they want?"

"Oh good," replies the prince, crawling out and climbing into a chair. "My back was starting to hurt sitting under there." And thus the rabbi succeeds in bringing the prince back to the king's table.

The story is an allegory, and one that has profound implications for those of us who work with teens. It hits upon the lesson we have been learning and repeating for years. As a Jewish professional, the rabbi knows that he may never convince the prince that he is not a rooster, but he also understands that this is not his job. Instead, his job is to crawl under the table and simply be with the prince wherever he happens to be.

This idea of "meeting them where they are" is one that drives us in youth engagement and has become our mantra in recent years. We know that when we do this, we are successful, even when it is difficult and accompanied by a sense of sacrifice and loss. When we don't, we are typically less successful. We are left wondering why, though we lead the proverbial horse to water time and time again, he never takes a drink. We *talk* about this adaptability in youth leadership all the time, but it is so much harder to follow in action. I suspect there are a few reasons for this gap from theory to practice.

First, we get stuck in the rut of trying to replicate what worked for us when we were young. We know that those methods are tried and true; clearly they were powerful strategies of engagement, or else we wouldn't be doing the work we are doing today. And yet, we forget that a teenager's world today is so vastly different than our own was. Even aspects that remain unchanged, such as the *value* of youth group programming, have to be re-interpreted for this new generation.

Secondly, we get caught between competing values in our profession: The first, to act like that rabbi in the story who is unafraid to go out on limb and try something completely crazy in order to prove the relevancy of Judaism to our youth. And the second, to protect and safeguard the authenticity and sanctity of Jewish life. This conflict often makes it easy to talk about revolutionary change—but much, much harder to implement it.

The youth culture in my community—[Congregation Beth Israel](#) in West Hartford, Connecticut – found itself in the midst of these competing values. We had watched as our traditional youth group, WHTY, dwindled to a mere fraction of what it once was. Our participation in regional events had, over time, become nearly non-existent, and our young leadership was nowhere to be found. By May of 2014, we were at a point of no return. Only one teen, a rising high school senior, expressed an interest in "running" for a position on what was an effectively defunct youth group board.

So what were we to do? As you might imagine, in the months leading up to this demise, my youth programmer and I spent many hours re-hashing what went wrong and what we could have done better. These conversations were largely unproductive. There was a feeling of “what was done was done.” We then spent time with that rising senior, teaching him about engagement and strategic conversations, role-playing with him so he could replicate these experiences with his friends and try to subtly prompt them into becoming active members of the youth group. But it was to no avail—he simply, as teenagers often do, did not follow though.

We were at an impasse, and plagued with the challenge that our youth group would not look like it was “supposed to.” In my mind, we had two choices: fold up the entire operation, shift our efforts to our 6th, 7th, and 8th graders, and hope that in a few years’ time we would create the culture we envisioned (and hope also, that suddenly the secular high school experience in our community would be different). Or, we could run our youth group ourselves with no student board, using a model traditionally reserved for much younger cohorts, and thus disenfranchising the very population we were hired to empower.

But perhaps there was a third option. Instead of following either of these paths, we did something that was, for us, revolutionary. We listened to the kids themselves. Over a few weeks, we had dozens of impromptu, completely informal conversations with teens. These were not forums. They were not organized by the synagogue. They were off-the-cuff dialogues that took place in hallways, in the car, over the phone, and through texting.

We simply asked kids, with no judgment—“*Where are you?*” We asked them questions like, “How come we never see you? Do you know that this programming is going on? Why don’t you ever want to come?” And what we got were honest answers that confirmed none of our worst fears. It wasn’t that teens thought youth group was lame or that they weren’t receiving communication about it. Instead, their answers clustered around one central theme: college.

What our students cared about more than anything else was getting into a good college. They were thoughtful and careful about their activity choices with this end in mind. They weren’t stepping up as leaders in WHTY programming because they did not see it as serving this goal. We were not meeting them where they were; we had failed to get under the table! We knew how youth group was “supposed” to be run, so instead of listening—we were trying to fit a square peg into a round hole.

So, we abandoned the sacred structure. We no longer have programming vice presidents (PVPs) or membership vice presidents (MVPs). We painstakingly threw all of that away in an effort to get under the table. In 2015, for the first time, three incredible Youth Engagement Interns ran our youth group. They spent the year building their resumes and learning skills that will benefit them in the college and professional worlds. We paid them a stipend, they were *supervised* rather than advised, and they built partnerships with both professional staff, and key lay leaders in our community. Our interns have portfolios, not positions; an office, not a lounge.

We cut the programming calendar down to just three events that they planned and executed for their peers; and the rest of the time they managed projects in the fields of development, member relations, and communications—projects that impact the entire congregational landscape, not just their own WHTY corner of the map. We know that it may be harder for them to relate to their peers in NFTY-North East (regional events are now “professional development opportunities,” by the way) and only time will tell whether this change will be as successful as it predicts to be. But for now, the view from under the table looks pretty good!

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## Engaging Youth

### *Congregational Perspective*

### The Value of Our Teens' Time

by **Becky DePalma**

This is the paradox of youth professionals everywhere:

We want to help our teens de-stress from their very busy lives by participating in enriching and restoring activities at their synagogue. How do we get them here without making their lives busier or adding more to their already over-programmed schedules? Is that even possible?

We are all grappling with this question. We work with a high achieving population who start building their resumes from a young age. How can we be a supportive force in the lives of our teens as they navigate the pressure to achieve? And, how can we build relationships at the synagogue when teens aren't physically here?

In 2010, the leadership of [Congregation Beth Am](#) realized that the once-strong community high school program was no longer a draw for teens, which precipitated concern about declining engagement overall. Since then, we have been reimagining our teen programming with a guiding purpose. We formed a Teen Task Force—with actual teens, parents, clergy and educators—to craft a vision for youth programming at Congregation Beth Am. The vision they came up with has four pillars:

1. Teens have a voice.
2. Teens build relationships with peers and staff members and feel a part of the Beth Am community.
3. Teens build their Jewish identity.
4. Teens have a sanctuary away from the pressures of Silicon Valley.

In my role as Director of Teen Engagement, I inherited this vision as a guide in trying to answer the question: How do we ensure that we are not part of the problem but rather that we are creating solutions for and with our teens?

When I arrived at this new position in the summer of 2014, I had the awesome and foreboding task of executing the four pillars of the Task Force's vision. I started by meeting with as many teens one-on-one or in small groups as I could. If our teens are supposed to have a voice, then I figure it is my job to be the ears that listen to it. I asked them:

- What do you love about your Jewish experience at Beth Am?
- What do you love about your life?
- What are you hoping to do next at Beth Am?

I received a variety of answers, but to my great surprise the answer that came up the most consistently was that our teens wanted a serious Torah study class just for them. I would have never thought of that on my own. When our senior rabbi, Rabbi Janet Marder, heard that our teens were thirsting for this, she stepped up to teach the class. Thirty students registered and we were off and running. This success was a powerful first example for us in understanding how to design programming for our teens.

Have I solved the paradox? Of course not. But we have, perhaps, taken a first step. At Beth Am, we've hit upon a key

element that works for us: Respect our teens, and honor their busy schedules by offering the highest quality possible. We can't expect them to have time for everything we offer or ask of them, but we can offer the highest quality, every time. We are uniquely positioned in synagogues to offer something they can't get on their own, and we have to design with that in mind.

As the youth professional, I work to be a cheerleader for every young person, both in what they are doing at the synagogue and also beyond it whenever I can. I listen closely to them and try my best to understand their whole identity, not just the Jewish pieces of it. I firmly believe they will have a positive relationship with Judaism if they have a positive relationship with us.

My biggest advice as a youth professional is this: We work for valuable, amazing teens exactly as they are today, not who they are going to be in ten years. We can invite and offer, rather than expect. Sometimes, too, it's not the getting them here, but the knowing where they are that can be the most valuable. By incorporating teens into our visioning, we know that their voices are always at the center of what we do, regardless of where our teens may physically be.

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**Becky DePalma** is the Director of Teen Engagement at [Congregation Beth Am](#) in Los Altos Hills, CA.



## Engaging Young Adults

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### 5 Innovative Ways to Engage Young Adults in Jewish Life

by Lisa Lieberman Barzilai

It's no secret that engaging millennials in congregational life requires innovative and creative thinking. While former generations of American Jews engaged in congregational life in traditional ways, today's Jewish young adults in their 20s and 30s want to craft their own Jewish journeys.

The Union for Reform Judaism has been partnering with congregations across North America to innovate young adult engagement as a part of its [Communities of Practice work](#). The full results of this work can be found in a URJ resource, [Paving the](#)

[Road to Meaningful Young Adult Engagement](#). Here, we highlight five of the best principles of young adult engagement:

#### 1. Make sure your online presence is compelling.

When today's young adults seek information or want to find new opportunities—including ways to get involved in their local Jewish community—their first stop is the Internet. Consider your congregation's presence on your website, Facebook, Twitter, LinkedIn, YouTube, Instagram, Pinterest, etc. Lisa Colton of See3 Communications reminds congregations to be responsive and personal, and to share engaging content. More than calendar listings, the content your congregation shares online should be inviting and newsworthy, helping to connect individuals to others within the congregation. Don't be afraid to let your congregation's personality shine online, demonstrating the warm environment you truly seek to build.

#### 2. Lower young adults' barriers to entry.

It's vital that congregational leaders recognize the real and perceived barriers to young adults' engagement in Jewish life, says Rabbi Oren Hayon, a congregational rabbi who previously served as director of the Hillel Foundation for Jewish Life at the University of Washington. For example, he says people in this age group typically have less discretionary income at this point in their lives than older members might. Of course, congregations can't necessarily just lower or eliminate dues, but they must demonstrate to young adults the value in paying for a Jewish congregational experience. Cultural barriers may also stand in the way of young adults' engagement: If your building is not easily accessible or is very formal, consider moving programming outside your walls to a coffee shop, restaurant, or someplace else with a more casual vibe.

#### 3. Embrace do-it-yourself Judaism.

Organizations that successfully engage young adults in their 20s and 30s have learned how to involve them in planning programming, creating experiences that reflect the organization's mission and the unique interests of this age group. Jamie Berman Schiffman, Director of Professional Development at Hillel International, explains that this tactic creates programming that appeals to the target audience while also empowering young adults in the community to step forward and take on a leadership role. One successful example of such programming is [Congregation Beth Elohim's Shabbat in the Hood](#), which “help[s] young, unaffiliated Jews build robust Jewish experiences based on what *they* want. Evenings can be structured around dinner, learning, singing, prayer, wine and cheese, or anything else you can imagine! You provide the space, we together invite the guests, CBE will send you a rabbinic student with a guitar, a prayer book, or whatever else you think might add to your evening.”

#### 4. Value quality over quantity.

Often, we evaluate success by counting the number of attendees—and more equals better. But don't lose sight of the bigger picture: Large attendance numbers don't always translate into long-term engagement. But when young adults take part in more intimate programming—small groups coming together to talk, learn, eat, and *kibbitz*—they are more likely to become engaged and even assume leadership roles. At [Temple Shalom](#) in Newton, MA, for example, leaders realized that rather than competing with the large-scale programming being done in the Boston area, they wanted their young adult engagement program—called [Shalom Y'all](#)—to focus on forming deep relationships. Their young adult leaders decided that instead of hosting large gatherings at bars, they'd instead focus on smaller cohorts. This realization and ownership of their collective identity opened the door to strategic partnerships within the community.

#### 5. Give young adults a seat at the table.

To sustain a successful young adult community, it's imperative that the congregational leadership supports their work. [University Synagogue](#) in Los Angeles is home to a young adult community called [Brentwood Havurah](#), which hosts nearly all of its programming “off campus” and doesn't require traditional congregational membership. Though synagogue leadership had always had a *theoretical* understanding of the need to invest and support young adults in their 20s and 30s, that understanding didn't always translate into practice. To address this issue, Brentwood Havurah's leadership wanted a seat on the congregation's board. This request seemed questionable to some board members, but following a campaign to educate the board about the value of this position, University Synagogue's board not only welcomed a young adult at the table, but rewrote its bylaws to reflect the inclusion of this new position.

Jewish young adults seek meaningful connections to Judaism. Taking these ideas into account, your congregation or community can develop creative ways to successfully engage millennials as they continue their Jewish journeys.

#### **Additional Resources and Discussion Questions:**

- [Paving the Road to Meaningful Young Adult Engagement—A URJ Resource](#)

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**Lisa Lieberman Barzilai**, RJE is the director of the URJ Leadership Institute.



## Engaging Baby Boomers

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### *Congregational Perspective*

## Boomers in Transition: How Our Synagogue Meets the Needs of New Empty Nesters

by Fran Martin

It had the makings of a perfect storm.

In 2008, I joined [Congregation Rodeph Shalom](#) in Philadelphia.

That same summer, at a synagogue get-together of BoomeRS—members who gather for social, spiritual, and educational opportunities at Rodeph Shalom and beyond—many in the group realized they all had children who were about to leave for college.

The BoomeRS came up with the idea that Rodeph Shalom ought to offer a discussion series about becoming empty nesters. Although I was a brand new member of the synagogue, the director of community engagement asked me—knowing about my training as a psychologist and my experience working with families—if I would lead a discussion series on “Becoming Empty Nesters.” I loved the idea and before long, we were off and running.

That fall, we scheduled four sessions of the new series, and I created a syllabus to guide the discussions. More than 20 men and women, most of whom did not previously know each other, attended our first session. Throughout the series, we addressed such topics as separation and individuation, effective communication, resilience, and understanding emotions—both our own and others’. Over time, our meetings provided a forum in which members could tell their own stories, not only sharing thoughts, feelings, and experiences related to having a newly empty nest, but also creating unique bonds and connections with each other.

As we approached the end of the series, we heard positive feedback from our participants: Everyone wanted more. We added a fifth session and invited recent graduates and young adults to tell us about their challenges and ways parents could be helpful. As with the earlier meetings, it was the personal stories that connected participants to each other, and ultimately, we agreed to meet monthly for the rest of the year.

We have been meeting ever since.

In 2011, we changed the group’s name to “BoomeRS in Transition,” which more accurately reflected the issues that concerned us. We also conceded that we were part of an inescapable trend: Despite efforts to include *everyone* from the congregation who wished to join us, we seemed to attract *only* women. Although we never intended an all-female membership, ultimately, we accepted that we were, in fact, a group of boomer women.

Today, we meet approximately every six weeks from September through May, with one summer gathering at a member’s pool club or shore home. Our membership includes a handful of women who were participants in the original “Becoming Empty Nesters” discussion group, and they are the foundation of our group, but we continue to grow and evolve in myriad ways. Numerous members of our group have taken on leadership roles within the congregation, and we have generated at least one spin-off group, which meets specifically to discuss issues around dealing with aging parents.

In our group, though, the meetings are, as they have always been, a place for people to be heard, to tell their own stories, and to create unique bonds and connections. We have new members who come, meet others, and develop relationships that form the foundation of *their* membership at Rodeph Shalom. More seasoned synagogue members come to see old friends, and to let us know what is going on in their lives. Although every session is different, we *always* take time to report on how we're doing, and no one—whether a first-time attendee or a longtime member—ever leaves feeling alone.

Although initially we set out to create a group for empty nesters, it evolved into a place where both new and seasoned members can make and maintain *real* and *profound* connections that allow us to be our truest and best selves. As our group continues to grow and change, we are confident that the wisdom we have gleaned from our past experiences will guide us in creating new opportunities to engage, both with each other and within the larger Rodeph Shalom community.

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**Fran Martin** is a psychologist who has facilitated the Boomers in Transition group at [Congregation Rodeph Shalom](#) in Philadelphia, PA, since 2008. She also is a co-chair of community engagement at the congregation.

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