How Congregations Measure Success
In Genesis, God challenges Abraham to look to the heavens and count the stars because, “So [numerous] shall your offspring be.” Abraham, though childless at this point in his life, is faithfully reassured. Despite the reality that his offspring currently number zero, he has faith that they will eventually be numberless and “a multitude of nations.”

This instance encapsulates the challenge of measuring in congregations. We can count what we can see, we can hope and dream for the future, but while we may be able to forecast and estimate what might happen, we can’t measure it. Often, we have a hard time even defining what we want to measure, much less measuring it.

Measurement is unavoidable. From birth to death, we count and measure. Respiration and pulse, height and weight, SATs and salaries, budgets and membership, life cycle celebrations and enrollments, GDP and market share. Every time we make a choice, explicitly or implicitly, we evaluate the benefits of our options, measure and compare and choose... or not. The question is not whether we measure, but what and how.

In the pages that follow, Amy Asin and Sacha Litman share insights into measuring congregational life and results based on their work with congregations across the country. We share a perspective from Gil Rendle, a consultant with the Texas Methodist Foundation and formerly with the Alban Institute, based upon his work in the United Methodist Church. And we bring in perspectives from colleagues Howard Kaplan, Deb Mattes, and Daniel Glassman, to provide a view from within our own Reform congregations.

Abraham looks to the heavens and sees more stars than he can count. In Numbers, Moses does take a census of the Israelites. While Abraham’s descendents are many, they are hardly numberless in Moses’s time. But how do we measure Abraham’s descendents? There are Jews, of course, but what of the multitude of nations? There are three Abrahamic faiths. Do we count Christians and Muslims as “descendents” of Abraham? And what of others who have been influenced by monotheistic or Jewish thought? Might they be descendents? Should they be counted?

Last fall’s Pew study offered a range of estimates for the North American Jewish population which varied based upon who counted as “Jewish.” There were those who identified as religiously Jewish and about twice as many who consider themselves Jewish, even if they have no direct Jewish ancestry.

As institutions committed to creating Jews, exemplifying Jewish values and preserving Jewish culture and traditions – even in reformed application – how do we measure our impact to support those who identify as “religious” Jews and to expand that number? And how and should we measure our impact upon those who stand outside this circle, considering themselves Jewish for any reason?

In the pages that follow, I hope you will find good questions, new ideas and ... perhaps ... some answers.
President’s Message

Janice Rosenblatt, FTA, Executive Director
Temple Beth Ami, Rockville, MD

Dear Colleagues,

With this issue, we are pleased to introduce an exciting new vision for the NATA Journal. The articles, written by our colleagues and other experts in the subject chosen for each issue, will be in-depth, thought pieces, dealing with larger issues of importance to our profession and our synagogues. It is our hope that the articles in the NATA Journal will provide the tools for strategic thinking and lead to productive dialogues among the professionals and lay leaders in your congregations.

The subject of this issue of the Journal is measurement. It’s an old management adage that you can’t manage what you don’t measure. Without measurement, you can’t actually tell if something is getting better or worse. You can’t manage for improvement if you don’t accurately know what is improving and what is not. Sacha Littman, at a recent NATA Conference, demonstrated the danger in making decisions based solely on anecdotal information. Measurement is critical to successful decision making.

The goal of this issue to delve deeply into measurement from different perspectives. We hope you will find this information useful and thought-provoking.

Congratulations to our Journal Editor, Alan Halpern, and our VP for Communications, Ellen Franklin, for their vision and implementation. We look forward to hearing your thoughts on the “new” NATA Journal.

FEATURES:

Using New Measures to Change the Conversation About Success (and Your Congregation) ......................... 4
How Survey Data Can Drive Your Strategy ............. 10
Counting Resources and Measuring Ministry ........... 15

VIEWS FROM THE FIELD

Measuring Success: Objective Passion and the Value Proposition .......... 8
Measuring Success in Action: Connecting With the Congregation .............. 11
Measuring Success in Action: Clarifying and Communicating Mission ........ 13

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Walk into any congregation early in the week, and you’ll likely hear some form of the following conversation:

**Exec Dir:** Hey, how was your weekend?

**Rabbi:** A bit hectic, but we had a couple of hours free and got in a nice walk.

**Exec Dir:** And what about the new program? This was the first one, right? How did it go?

**Rabbi:** Well, it was terrific. We had about 15 or 20 parents show up, so the room was full.

**Exec Dir:** Awesome

**Rabbi:** I was really worried that we were going to run out of food, but there was some leftover salad from the Sunday school teacher’s lunch, so we were OK.

**Exec Dir:** Great

**Rabbi:** People seemed to like the speaker. Not too many on smart phones, and some good questions. A bunch of people stayed after to talk to him.

**Exec Dir:** That’s terrific.

**Rabbi:** Of course, Mrs. Schwartz complained that there was too much noise from the playground, and she couldn’t hear very well, but other than that, no complaints.

**Exec Dir:** Wow. Only one complaint. That’s amazing.

**Rabbi:** Most of the babysitters were happy to take the hours as community service, so I think I can bring this in under budget.

**Exec Dir:** Sounds like a winner all around. Kol hakavod! Can’t wait to report those numbers to the board and finance committee.

Replace the titles with Lay Leader, Board President, Cantor, Educator and the conversation is still likely to be the same. And for good reason. Measuring the efficiency and delivery of programs in congregations is important. Allocating scarce professional and lay time to programs that aren’t well attended or generate lots of complaints doesn’t make sense. We typically use five measures to evaluate programs: number of people in attendance, whether there was enough food, if people were on task, how many complaints there were, and whether the program was on target for budget.

Using these measures is relatively easy. It is largely possible to capture this data just by watching the program run. There is no need for additional interaction with congregants.

The problem is that these measures are largely insufficient. When attendance starts to go down, you’ll be able to measure that you’ve got fewer people in the room, but you won’t have any idea why. When attendance is good or increasing, you don’t know what you are doing right. Sure, you can attribute it to the dynamic personality of the leader or great music, but that is usually only a guess and it probably only scratches the surface of what’s really going on. Furthermore, when you are nurturing a new community or a new program, attendance might not be overflowing in the beginning, but that doesn’t mean that you aren’t building success for the long run.

So what should we be measuring and what should we be talking about in our hallways? I believe that the outcome that we’re really trying to create is sustained engagement in Jewish life. Sustained engagement also happens to lead to more congregants and more financial resources to support the congregation. And to achieve sustained engagement we need to do three things well:

- Engage people in a way that allows them to experience that Judaism has meaning that is applicable to their lives
- Foster the development of relationships among congregants and between congregants and the congregation and its staff

Using New Measures to Change the Conversation about Success (and Your Congregation)

By Amy Asin, Consultant
Asin Associates, San Francisco Bay Area
• Create experiences that have an impact on participants’ lives in a way that either makes the world a better place or makes their lives better.

In fact, that’s the other conversation that I hear in congregations. Leaders want to create meaning, have an impact, and develop relationships. They are aware that many of our existing congregants are disconnected and that the next generation of congregants will not walk through our doors just because of an obligation to the community or because it’s “what Jews do.” Congregations have yet to prove to these potential participants, both members and not yet members, that there is something of real value inside our sanctuaries and our classrooms. We are looking for a new conversation about what we do, but we are stuck talking about old measures.

And here’s my main point. If we want to start to get better at meaning, relationships, and impact, we need to change the conversation. If we only talk about and only reward attendance, food, complaints, budget, and being on task, then one of two things will happen. Either those are the only things our program designers will focus on or when they focus on what really matters – relationships, meaning, and impact – their morale will deteriorate when we only tell stories about attendance. In order to create meaning, build relationships, and have impact, we need to start telling success stories about when these things happen. We will be well served by learning how to observe them when they happen, learning how to tell stories about them, and learning how to measure them.

A few case examples to illustrate the point.

Creating New Quantitative Measures

One congregation that I am working with was concerned about its retention rate with teens after B’nai Mitzvah. Basing their approach on some research obtained from the URJ, they believed that if they could create meaningful relationships with the teens before they were teens – starting in fifth grade – that those relationships would carry through B’nai Mitzvah and pay off with sustained engagement over time. This congregation created a relationship rubric – a 1 to 5 scale that rated the relationship that they each had with each individual fifth grader. For one school year, the Rabbis, Educators, Cantor, and Executive Director took some proactive steps to get to know the kids better. They checked in with each other occasionally and rated the kids at the end of the year. What did they find? The methods they were using to create relationships were not successful, the ratings had barely moved. They learned that they needed to rethink how the professional team at the congregation approaches the whole topic of getting to know the kids in the congregation. While the effort failed, they were able to learn from their failure and change in the way they behaved, driven by a real measure of what they cared about.

Changing the Conversation Among Leadership

Another congregation recently made some dramatic changes in its religious school and the education team felt very good about reaching all of its goals for the year. Despite this success, the board leadership was still focused only on enrollment and budget. The Director of Education and her lay team decided to change the conversation at the board level about what was happening in the religious school. Instead of reporting each month on enrollment, fees, collections, fundraising, and budget, they decided to talk about their goals for the community. Each month they now report about their new philosophy of education, why people choose the school, and how the families and children are being served. They tell stories about the experiences that children and families are having in the programs. The first few months, they didn’t even provide the numbers even though the numbers looked very good. As the board got conditioned to a new kind of conversation, the education leadership added back the discussion about numbers. The hope is that in the future the board will have a deeper sense of the real goals of the education program and see it as a place of investment for the congregation.
Observing a New Set of Outcomes and Training Ourselves to Notice Them

At a different congregation, an educator contacted me the week after Halloween. She was very excited because attendance had been low at Tot Shabbat that week. She attributed it to the Halloween hangover. Why was she excited if attendance was low? First, she found that she was able to interact with the participants in a completely different way, getting to know them much better, and they were able to get to know each other much better as well. Second, she was excited because it wasn’t until she starting sharing the story with a colleague on Monday morning that she realized that attendance had been down. In the past, she would have obsessed about the numbers all weekend and not even noticed the other great results. The educator realized that she had trained herself to think about new measures related to a broader set of goals than just attendance. She knows that she made great strides during the light attendance week and that these will pay off in the future.

Being Persistent

One of the congregations in the URJ Community of Practice on Families with Young Children held a program on a Shabbat afternoon. The program leader was very excited at the event because there was a lot of evidence of success and stories that she would be able to share. She overheard one parent inviting another to the Tot Shabbat the next week. Children were running around and participating in the stations that she and the rabbi had set up without their parents guarding their every move. This was evidence to her that everyone felt comfortable enough to move out of their families units, to allow the kids to run around. With young children, chaos can be a sign of success. To settle the group down to prepare for havdallah, the rabbi and program leader got down on the floor with the children, the parents followed, and havdallah closed out a wonderful Shabbat afternoon. This was a real example of success and a story the program leader hoped would circulate around the congregation. She had observed several examples of relationship building and of meaningful engagement. But here’s the ironic part. On Monday morning she fielded a call from the rabbi. He had a message from a board member who wanted to know how the program went. He wanted to be able to share the number of people who had attended the event! While she had seen evidence of success and accumulated stories that she wanted to share, she had yet to change the conversation at the congregation to look at new measure of success.

This is the critical moment for most congregations. How can we change the conversation to be about more than the number of people at an event? How can we measure the things that we know really matter and tell stories about those as well? And how can we create actual measures so that people who are used to thinking in quantifiable terms can be satisfied?

There is much work to be done in this area. I am blessed to be working with the congregations in the URJ’s Communities of Practice in Successfully Engaging Young Families, Pursuing Excellence through your Early Childhood Center, Emerging Young Adult Initiatives, and Reimagining Financial Support for your 21st Century Congregation. In partnership with these congregations and the extraordinary URJ staff who support them, we are exploring this question and creating new measures. We don’t have all of the answers yet, but we are starting to make headway.

The case studies above, in fact, represent two different ways of collecting and sharing evidence of success. In the first, the congregation found a way to quantify something that many believe is unquantifiable. In the other examples, anecdotal evidence was observed in order to change the conversation about success.

Quantitative data can be collected using rubrics, and these rubrics should be tailored to your situation. And, in fact, the process of creating the rubric will help you understand your goals much better. Here is an example of a rubric focused on relationship:
1. How many people do the congregants in this community know by name or face?

2. How many people do the congregants in this community know something about that could potentially lead to a deeper relationship? (e.g. they like to go for hikes, they study Torah weekly, they are in the same profession as me)

3. How many people have the congregants in this community had a significant interaction with or shared an experience with?

4. How many people have the congregants in this community gotten to know beyond the walls of the synagogue?

5. How many people do the congregants in this community share joy or pain with?

If a rubric is too intimidating, try a quick survey that can be repeated on an annual basis. The following questions were developed in a project sponsored by the Jewish Community Federation of San Francisco.

To what extent do you agree or disagree with the following statements?

a. I feel welcomed in the congregation
b. I see and know people I can talk to
c. I feel comfortable approaching clergy
d. My relationships have extended beyond the congregation
e. I have been supported through difficult times
f. I am growing Jewishly
g. Since I joined this congregation, my interest in Judaism has increased
h. I am challenged intellectually

…and add your own.

A second way of collecting and sharing evidence of success is illustrated in the last three examples. Know what success looks like, intentionally notice it when it is happening, and share stories about it when it does happen. What would you expect to see in a community where deep relationships were formed? What would you observe if what was happening in your congregation was having an impact on people’s lives or helping them to make sense of the world around them? What are the questions that you would ask congregants and what are the responses that you would hope to get? And then, what is the story that you will tell (even if someone calls you to ask how many people showed up)?

I believe that the future of our congregations in some part rests on our ability to go beyond measuring programmatic success based on food and budget and attendance figures. The transformational change that we need to create in most of our congregations requires that we look at things differently. If relationships matter, then we have to know if we are doing a good job building them. If congregants are looking for meaning and impact, then we have to be able discern when meaning and impact happen. This change will not be easy. The five old measures are still relevant, and asking about them is a habit deeply ingrained in the leadership of our congregations. But this change is necessary. We must begin to measure, observe, and tell stories about all of the things that count.

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### Discussion Guide for Your Congregation

1. What are the measures that we use to gauge success in our congregations? Which of these are formal that we track on a regular basis? Which of these are informal measures that we may not track regularly but we talk about constantly?

2. Do these measures fully capture what we are trying to achieve?

3. What else would we have to measure or observe if we want to capture more of what we know we need to do to be successful?

4. What are some indicators of success that we can begin to observe and share stories about?

5. If we want to collect quantitative data related to these areas, how could we design a small pilot to test the measures and the measurement process?

6. How can we be more conscious of what we talk about and reward as success so that we are creating the right incentives and rewarding what we really need in order to transform our congregation?
Measuring Success:
Objective Passion and the Value Proposition

We are passionate about our business, and while some of my colleagues hate it when I refer to our synagogues as businesses, we are just that. As a business, we are required to not only account for how we spend the funds entrusted to us, we have to measure the effectiveness of the use of those funds.

The difficult question is how should we measure what we do, how do we define the effectiveness of our programs? How do we balance objective and subjective evaluation? “It was a great program, too bad so few attended,” is statement I often hear about programs offered by synagogues and other non-profit organizations. Is it okay to spend funds on great programs (often a subjective evaluation) that all too often are poorly attended? Are numbers the only measurement that counts?

I use the recent re-opening dedication of our sanctuary as an example. After years of planning and almost two years of being closed for construction, we opened for services on Erev Rosh Hashanah. A few weeks later, we produced two back-to-back re-dedication programs intended to celebrate the sanctuary with not only our congregation, but the wider Los Angeles community. The morning program, aimed at families with young children, included the dedication of a new Torah, consecration for the Kindergarten children in our elementary and religious schools, and a “Jewish rock concert” with Sheldon Low. The family event was attended by about 800 people, parents and children. At the end of the program there was a reception and each family received a tzedakah box designed especially for the occasion.

That evening, our 1700-seat sanctuary was filled to capacity with members of the congregation and the public, people of different backgrounds from all over the city. The program included blessings by a variety of religious leaders, a speech by the mayor of Los Angeles, and an interfaith concert with performances by six choirs. The evening closed with Burt Bacharach leading all six choirs in “What the World Needs Now is Love, Sweet Love.” The program completely fulfilled the vision of the Temple clergy and senior staff.

All in all, the morning and evening programs were huge successes. But by what measure?

A couple of days afterwards our camp director, Doug Lynn, congratulated me on the morning’s success. For both he and his six-year-old daughter, who received her “mini-Torah” during the consecration ceremony, he said the program was meaningful and fun. Participating with their Jewish community, Doug knew that his daughter, even though only six, felt the real connection that he did himself – very positive indeed.
“So,” I asked, “would it have been successful if only 500 had attended?” “Yes” was the answer. “How about 200?” “Well,” he said, “it would have still been a great program, but we all would have been wondering why we didn’t get more people there. There would have been second guessing in regards to our marketing and the relevance of the program to our congregants and their children, and it would not have been considered a success.”

You might be wondering, for a place as big as Wilshire, why were there “only” 800 people? The answer is that the event was designed only for families with children in certain grade levels. It turned out some who were not included were upset and felt left out. I guess that is a measure of success as well.

Some programs work, some don’t. A few years back we decided to try a “learners” minyan twice a month on Saturday mornings. The goal was to involve congregants actively in Shabbat services in a way that does not work during a b’nei mitzvah service. There was a cost of course, as we needed to add staff. But when I questioned the expense, I was told that this was a “value” we wanted to pursue. We even recognized that it could take a few years to develop and grow the numbers that would make such a program “successful” – worth it, if you will. In the end, for a variety of reasons – perhaps insufficient marketing, inconsistent leadership, too small a pool of interested congregants – it did not pan out and was canceled.

Our idea of what success should look like going in, both in quality and quantity, didn’t materialize. So I ask again, how do we evaluate if an event or program was a success? How do we measure? What are the criteria? It’s rarely the number of attendees alone; it’s also the value to the numbers who attended. That’s very hard to measure objectively. It would be ideal to set the criteria for measuring success prior to any program. The truth is, we usually don’t, and even when we do, we often recalibrate those criteria after the program based on our feelings about its value.

For me, the real question is what is the best use of our “Jewish” dollars? Each and every one is precious. Whether my synagogue or another, I often hear about how great a program or speaker was. Then when I ask about the actual cost and numbers in attendance I do the math and say “it cost $X for every tush in a seat.” Was that the best use of those “Jewish” dollars? Would those funds have been better utilized to help send a child to a Jewish day school or summer camp? Better to help a couple of teens spend the summer with NFTY in Israel? Better to help feed a needy family at our food pantry? With such great competition for so many worthy pursuits the choices are difficult, and the measure of success is our interpretation of value received for a given dollar spent.

We try to measure with clear thought and with real intention. As difficult as it is, we must do it with what I refer to as objective passion. That is our most reliable measuring tool. —Howard Kaplan
How Survey Data Can Drive Your Strategy

Sacha Litman, Founder and Managing Director
Measuring Success, Washington, DC

Do you ever feel like you are flying blind as a congregation president? As a board member, do you fear that you're not really moving the needle on Jewish identity formation of congregants? Do you wish, as finance chair, that you could be more strategic about planning next year’s budget instead of just making small tweaks to historical allocations?

Many synagogue leaders decide that the best solution to the above challenges is to write a strategic plan. But most synagogue strategic plans reflect more anecdotal process – a committee that meets for a year and generates subjective ideas based on personal experience.

Many years ago, while working at McKinsey & Co., I was part of a team that provided pro bono services to a synagogue. In crafting their strategic plan, we had them fill out a template with their anecdotal suggestions and “gut” opinions. Of course, it turned out to be a relatively ineflectual document. Because the project was pro bono, it was missing the one important piece that, along with a McKinsey price tag, would have truly helped the synagogue develop its strategic plan: data.

That’s why I created Measuring Success. As a firm, we ensure that non-profits, faith-based groups, and other mission-driven organizations (with non-corporate budgets) are equipped with and can use it effectively.

Did you know that 80% of all anecdotes that we’ve tested from synagogues have been rejected by the data? We believe that using data is a bit like Google Goggles, the tool that lets you search the web using photos you’ve taken on your phone. Why stand around guessing what monument or piece of art you’re looking at, when all you need is a picture of it for Google to provide you the name? Data are a synagogue’s snapshot; they’re fact-finding portals that eliminate guesswork. Once a data portrait is taken, it provides all the information you need to know about where you stand as an organization.

How do I become data-driven?

Data, or sets of information, can be found in many places: synagogue expense reports, attendance logs, and member giving records to name a few. To go back to Google, data can also be solicited. This is where synagogues need to take a much more proactive stance. Every year, Google does its “Googleggeist” – an intensive employee-wide survey that generates an astronomical 85% response rate. Google’s concern for employee happiness is one of the major reasons it’s considered a top place for people to work. What would happen if synagogues also undertook an annual member survey?

The data show that they would make great strides in helping members study, worship, socialize and grow spiritually.

(continued on page 12 ➤)
Measuring Success in Action: Connecting With the Congregation

As executive directors and administrators we often hear similar positive and negative feedback from our congregants. Those who speak the most often, or the loudest typically get our ears and we react to what they are telling us. This anecdotal information sometimes leads us in the right direction but outside of what we are hearing from the loud minority how do we know we are focusing our energy in the areas that need more attention? Do we really know what our congregations want or need?

During the spring of 2013, we embarked on a three year journey to help us as a congregation make informed “data-driven” decisions. To be very transparent, the senior staff and lay leadership were unsure of what we would find out about from our congregants. The results of our congregational survey helped confirm some notions but completely took us by surprise in other areas. Our congregants let us know that they would highly recommend our temple to their friends however felt as though they did not have strong social connections to others in our community and were not gaining a sense of spiritual growth. We were humbled to find out these truths but motivated to make positive changes in our congregations.

Taking into account what our congregants said, we have started developing a plan with our Measuring Success Task Force, board and staff. The leadership of the temple has begun attending seminars and reading books on the subject of relationship building like Ron Wolfson’s Relational Judaism. Over a dozen congregational leaders attended Wolfson’s workshop ahead of the URJ biennial.

We have more importantly changed our thinking and approach on how we connect with families and individuals at events as well as unstructured time in and out of the temple. Board members have not only become more visible but they have make a greater effort to connect with everyone they encounter at temple. Events have more interactions with others intentionally programmed in. Committees such as our membership committee have brought more members into the fold to allow for opportunities to connect with others. We believe this intentionality will allow us to build social connections amongst our community that will turn help individuals feel a greater sense of spiritual growth.

We have only just begun this long journey. We will not be surveying the congregation for another two years. The information we learned from the survey however has become invaluable in the way we think and plan for the future. Making data driven decisions will be key to maintaining and growing our congregation.

—Daniel Glassman
Once a synagogue decides to survey its members, it must consider what kind of information it wants to know. The creation of surveys themselves can be done in-house or by outside experts with experience asking the right questions to drive insights. Over the past ten years, we have surveyed approximately 100,000 participants in Jewish life from over 50 communities. To help empower synagogues to become data champions, we have distilled down the most important data types for synagogues to three core areas. We recommend creating a hypothesis for each of these categories and then testing the hypothesis through carefully crafted survey questions.

1. Perceived Quality

Perceived quality is the extent to which your members value you. It assesses the emotional connection between you and your congregants and whether or not your congregants would recommend you to others.

2. Financial Analysis

Financial analysis reflects your member’s financial priorities as well as giving attitudes. It also reflects how well they believe the synagogue stewards its financial resources.

3. Congregational Behavior

Congregational behavior helps you understand what activities, habits, and hobbies your congregation is involved in.

Data from these three categories provide a holistic picture of your synagogue. Are your congregants proud to be part of your synagogue and do they believe it adds value to their lives? If not, your retention rates will decline and negative word of mouth will spread. Is your synagogue setting the right budget priorities? If not, people will lose confidence in the synagogue’s leadership. Are congregants involved in programs, worship services, and other extra-curricular activities? If not, you may not be helping engender powerful social connections among your congregants, leading to a weak relationships and transient members.

One Synagogue’s Story

We worked with one particularly large synagogue from the Chicago area to address all three of these areas. To begin, we focused on Financial Analysis. The synagogue had noticed a big decrease in annual membership giving. A survey revealed that only 26% of congregants strongly believed that the synagogue was effectively managing its budget. Synagogue leadership was taken aback that the congregation lacked confidence, or maintained low Perceived Quality, in its financial managers. Furthermore, only 20% of members strongly agreed that they would continue to contribute at the same amount they were currently giving or above. The leaders knew that they could not financially sustain themselves if this attitude continued. They decided to implement activity-based costing to show where the funds were really going (it’s not “overhead” just because it’s the rabbi’s salary) and became more transparent; congregants were then more willing to contribute when they saw where funds were allocated.

The hard data also led the synagogue to regularly communicate about budgets, dues, fees, fundraising, and financial stewardship. They created a “Members Only” area on the website, where congregants could review annual budgets and monthly board presentations. They started a monthly Bulletin on budget and finances as well as two Sunday morning breakfast forums, including an open Q&A. Immediately, the synagogue’s financial climate changed and members expressed appreciation at the steps the synagogue was taking to achieve openness and transparency. The synagogue plans to re-survey its members next year to assess continued improvement in financial confidence.

Through an in-depth Congregational Behavior analysis, this same synagogue also wanted to find out how to improve member engagement. They were surprised to learn that nearly 40% of respondents “wanted more social interaction.” The synagogue had long invested in social activities and so was caught unawares when this statistic surfaced. They added more “retreats” and special activities, but got very poor turnout.

[continued on page 14 ➤]
Measuring Success in Action: Clarifying and Communicating Mission

While we initially embarked on the Measuring Success survey as a means to measure where we stood with our congregants and how we compared to our peers in the community, we have gained a lot of insight into how we operate.

One of our key findings was that our members cannot clearly articulate our mission – who we are, or our vision – where we are going as a synagogue; in other words, if trapped in an elevator, not one could give the one minute “speech” to tell someone about Temple Chai.

When analyzing the survey results and our action plan to improve our “shortcomings,” we discovered that we that we have not updated our mission statement in twenty years, the same length of time that our Senior Rabbi has sat on our bimah. In common practice, a mission statement should be revisited every few years, if not more frequently. We have obviously put it on a shelf and let too much dust settle.

When we brushed it off, we realized that who we are today is not who we were twenty years ago. In our post-denominational world, including the “principles of Reform Judaism” as part of our mission statement doesn’t hold the same meaning as it did back then.

This led our senior and executive staff and our clergy to start the process of formulating a mission statement task force. But before we could embark on the journey, we needed to align internally in order to provide the framework for the mission statement. During a recent staff retreat held offsite in my home, we worked with a consultant on asking us to identify what we like in our current mission statement and what we dislike. We discussed what we do well, what we would like to do better, and what critical ideas or components we want to include in our mission.

But this one-day retreat is only an example of the “cultural” changes we’ve made in our team. In selecting our task force, we had a very deliberate conversation about who needed to be included, ensuring the same “regime” wasn’t controlling the process and to reverse the “top-down” perception under which we operate. We have put together a marketing committee to structure branding guidelines to create more consistent communications. We have now added strategic planning to our agenda, something that was not done before.

In the spring of 2013, two years after the initial Measuring Success survey, they will administer another survey and measure how these results compare to the original. If there is an identified statistically significant increase in our results on mission and vision, Temple Chai will receive a grant from the Measuring Success organization. While there is a monetary incentive to perform well, it is imperative to our longevity as a community that we improve these results. In this spirit, we have also begun a monthly feature in our newsletter about Measuring Success results and what we are working on based on these results. Unlike our old mission statement, the Measuring Success survey results are not collecting dust. — Deb Mattes
Continuing to believe in the data, they probed further and learned that while congregants did value social interaction with other families, they didn’t have time for extra activities – being busy with careers and children. So the synagogue added more activities that fostered social interaction at times when congregants were already at the synagogue, such as during Sunday School when parents were coming to the synagogue for drop-off and pick-up. By sticking with the data and changing their strategy, the synagogue was able to increase its perceived value.

The Data Cycle

As illustrated through the previous examples, there is a powerful framework for undertaking data-driven analysis of your congregation.

1. **Form a Hypothesis**: Every action must start with a question that needs to be answered.

2. **Survey Audience**: Compose questions to elicit information about the thoughts, beliefs, and opinions of your members, staff, and leadership.

3. **Analyze Results**: Assess what trends and information is revealed in the data.

4. **Modify Strategy**: Change or develop strategy to reflect the needs and desires of your congregation.

5. **Execute Strategy**: Make changes to your spending, programming, education, leadership, etc. as a result of your strategy.

6. **Assess Improvement**: Has there been improvement? What works better now that you have developed new strategy?

Going through the data cycle allows your congregants to be heard and become stakeholders in your synagogue’s success. On top of that, data save your congregation money, by reducing impulse spending and allowing for expenditures on only vetted initiatives.

Want to know the secret to a great strategic plan? Starting with and allowing the data to drive strategy instead of opinion and sentiment. The best way to gather that data is with a survey, the results of which will enable you to deploy resources to the issues that really matter to your members. Whether it leads to adding more youth programs, changing the time you hold services, or creating a new dues structure, data are the key to making your synagogue relevant and responsive in a truly strategic way.

The Data Cycle
Above All, the Necessity of Counting

Let’s begin with the simple recognition of the necessity of counting as a responsibility of leadership. One definition of leadership is the ability to draw an accurate and honest picture of the current reality. In most contexts this cannot be done without counting.

Ministry is about more than describing present reality. Ministry is, more importantly, about some change in a person, a congregation, or a community. Such change is the why of ministry and the why does not lend itself so easily to numbers. Having established the need to count those things that can be counted, we need to go deeper.

At its heart, ministry is not about membership and organizations. Christianity is an alternative narrative to live – a different way of understanding one’s world and living in that world that is based not on the power of the culture but on the alternative story from God that makes forgiveness more important than winning, that makes giving up control more meaningful than seeking to control others.

At the heart of ministry is the changed self that comes from an encounter with the Divine. Such change is enabled and supported by a pastor who provides the “cure of souls.” The cure of souls is a shepherding of people in which those who need encouragement are encouraged, while those who need to be challenged are challenged. Those who need support are supported, while others who need correction are corrected. The cure of souls and the formation of the individual in faith is an individual process that needs both the support of community and the accountability of covenantal relationships. None of which is easily countable. In other words, the purpose of ministry is much more difficult to measure than is the way we do ministry and the resources we use to do ministry.

Attention to Vital Congregations

Formation of people in faith happens in community. While much that happens in the ministry of the local church is not easily countable, the health and vitality of the congregation itself is an issue of great concern because the congregation is where formation takes place for many of us. And, the health and vitality of the congregation can, to some extent, be measured.

If the goal is only about making vital congregations, however, then it can be appropriately critiqued as a new institutionalism. In a new institutionalism, the metrics of membership, attendance, baptisms and other countables are merely institutional measures. Vital congregations are not an end result. They are tools
needed by the denomination by which mission – the making of disciples – can be accomplished. If Christians are formed in communities that practice and share the disciplines of Christian formation, and if the mission of the United Methodist Church is to make such disciples, then the United Methodist Church needs vital congregations to fulfill our purpose.

The fact remains that it matters whether a congregation is growing or not because growth is a primary indication of whether the congregation is or is not connected to its mission field. It matters how many people are actively engaged in the ministry of the congregation because it is an indication of whether it is a place of emotional and spiritual health that can help people grow in Christ. It matters whether a congregation has "out-aged" its surrounding mission field because it is an indication of whether it has the capacity to negotiate generational changes to be able to speak the alternative story of Christ to the new people. It matters.

The bottom line in all of this is that the purpose of a pastor and the purpose of a congregation is to make a difference. Because of the presence of that pastor or that congregation, over time something is to have changed – and how can we have any indication of this change if we do not, in some way, measure?

The time is ripe for us to mount a new conversation about metrics as a tool of ministry.

**Counting and Measuring as Separate Tasks**

Let us distinguish between counting and measuring. These are highly related, to be sure, and the distinction I will offer is, to some extent, arbitrary. Nonetheless, I offer the distinction to make the point that we have been stuck primarily in counting and feeling the limits of our stuck-ness. We now need to move on to measuring. Let’s make the distinction this way:

Counting is giving attention to numbers. When counting, the question to be answered is “how many?” Conversations about “how many” are most frequently conversations about resources. Conversations about resources, in a time of limited resources, are commonly conversations about sufficiency – “do we have enough?” or, “how can we get more?”

Measuring is giving attention to change. When measuring, the question is not about “how many?” but rather about “how far?” Conversations about “how far” are frequently about the change that can be measured over time as in, “how far have we come, over the past year, toward our goal?”

There is, of course, room for, and a need for, both counting and measuring. In all complex tasks multiple tools are needed. However, like all tools, the right tool must be chosen for the job at hand. To that end, it is worth taking a deeper look at the two tools of counting and measuring as separate tools available in our consideration of metrics.

Let me begin with Edwards Deming’s idea that systems are constructed of three parts: the input (that which goes into the system); the throughput (that which the system does to, or the way the system uses, the inputs); and the output (or outcome - that difference which the system is trying to make.)

*A simple diagram of such a system is illustrated below in Figure A.*

At the heart of the church’s struggle to be fruitful is the common non-profit dilemma: that non-profits routinely do not know what difference they are trying to make. In other words, non-profits, including churches, do not know what outcome they are trying to produce.

Non-profit organizations’ outcomes are commonly difficult to quantify. For example, increased civility within a congregation, as necessary as it is for healthy community, is not easily quantifiable. Not being easily
Counting – Six Propositions to Consider:

1. We need to count.

2. While we need to know many things about our churches that can be counted, we are limited when we over-focus on things simply because we know how to count them.

3. Many of the things that we currently count in the church turn out to be insensitive ways to quantify what we think to be important. We are counting membership in an age when people do not join organizations. We are counting attendance at a time when worship is seen as a “program option” by people deeply committed to a search for faith. We are counting baptisms at a time when parents are reluctant to make pro forma decisions that they believe should be made by their child at an age appropriate to understanding.

4. Counting is more often about resources and activities than about outcomes.

5. Counting alone often leads us to conversations about scarcity. When simply counting how many, how often and how much, the conversation naturally goes to what we don’t have – our scarcity of resources and activities in comparison to what we wish we had. What is not considered is what we might actually need if we were clear about the local and specific outcome of our ministry.

6. Did you remember #1? Despite the limits of counting, it actually is necessary to count. One cannot reasonably plan and lead if there is no awareness of resources and activities that can be used for the intended purpose. Leaders need to know their current baseline numbers.
Measuring – Four Propositions to Consider:

1. Measuring focuses not on resources and activities but on outcomes - change. Measuring relates not so much to what is but rather what could be. It is more about call, purpose and possibility.

2. Change is a fundamental bottom line of faith, and therefore about faith communities. People who have encountered Christ should have behavior that has been changed from those who have not encountered Christ. Christian congregations should be seeking to change the corner of the kingdom of God they have been given (their mission field) because of their faith.

3. The best questions of measure ask both about change and about time. “Over the last six months or a year, how far have we progressed toward the difference that we believe God intends us to make?”

4. Measuring is now at the leading edge of wilderness skills that church leaders need to learn in our journey into a changed mission field.

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The National Association for Temple Administration (NATA) is an active professional network of Reform Jewish Synagogue Executive Directors committed to Judaic principles of ethics and integrity.

NATA’s mission is to support its members by:

- providing educational and training activities and standards,
- providing its individual members and their URJ congregations with access to NATA resources,
- advocating for and promoting the profession of Temple Administration,
- serving as the professional partner with the Union for Reform Judaism.

NATA Placement

NATA Placement posts job listings on the NATA website and alerts the membership whenever there is a new posting. While we do not match congregations with job candidates, we can offer sample job descriptions, give general advice to congregations regarding salary, benefit packages, and how a congregation may benefit from having a top level professional on staff. The how-to-manual, “A Guide for Congregations Going into Placement for a New Executive Director” is available for download.

Congregations looking to hire and individuals seeking jobs are encouraged to check the NATA website often, as new positions are posted from time to time. Please visit www.natanet.org and click on “For Congregations” on the left for more information.

Beth Silver
NATA Placement Chair

National Association for Temple Administration

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