

The Positive Effects of Long Range Planning for Temples

Thesis for Fellowship of Temple Administration

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“Failing to plan...is a plan to fail!” If planning is so good for us, then why don’t we all do it? Planning raises problems. It often drums up painful reminders of what we are doing wrong. It involves extra work for a lot of people. It calls upon planners to construct a vision of where they see their business heading, and it requires research and strategy and time to determine how to accomplish goals. The road to long range planning may include some bumps and curves, but then, you probably would not embark on an extended car trip without a road map. I contend that your temple, too, will benefit from a written-down, easy-to-read guide to steer you from year to year. No longer should temples rely entirely upon spontaneity, improvisation, and those undependable flashes of enormous insight! Rather, they should follow the lead of the “for-profit” world and strategically plan their future course.

The following is an analysis of the positive effects of “Long Range Planning for Temples.” I will site examples of planning in the “for-profit” realm, identify reasons why temples should plan, talk about the major focuses of planning and how to get the process started, describe the necessary steps to take, give concrete ideas of how to write a plan, and state what to do after the plan has been written. In addition, I will address the role of the executive director in the planning process, and include examples of successful synagogue long range plans.

Long range planning is a never-ending, often contentious task in which essential questions are asked about a business, followed by the right people attempting to answer those questions. It identifies leaders’ visions for the future and suggests ways to successfully reach goals. A long range plan is the product of a detailed planning process. “The companies that will prosper and outpace their competitors during the next two decades will be those that will be able to out-think their competitors strategically, not out-muscle them operationally,” says author Michel Robert,

of Strategy Pure & Simple II. Over the past two decades, American corporations have experienced the loss of millions of well-paying, highly skilled jobs. This has occurred during a time when an avalanche of new management concepts were introduced, such as TQM (total quality management), re-engineering, computerization, and benchmarking. These concepts were expected to propel organizations to unparalleled prosperity; however, this did not happen due mainly to a lack of strategic thinking to distinguish between operations and strategy. The new techniques were designed to make corporations more efficient at current procedures, but did nothing to assist organizations determine what they wanted to become in the future.

An example of an American business that used strategic planning successfully is Kodak. In the late 1970's and 1980's, Kodak downsized its workforce by 34,000 jobs over an 8-year period, without any improvement in profits. The issues at Kodak were not operational but strategic. Kodak had diversified into unrelated businesses such as pharmaceuticals, clinical diagnostic machines, and batteries, taking its eye off its core emphasis. New management strategically refocused the company on photography and digital imaging, and the company's profitability began to rebound.

Furthermore, when computers were in their infancy, two companies in the best position to capitalize on that emerging trend, were General Electric and Siemens. However, both companies lost their focus, and the trend was exploited by an upstart company called International Business Machines. Additionally, in the telecommunications industry, AT&T failed to make the move to cellular telephones, despite the fact that they invented the technology. Likewise, in the car industry, General Motors, the industry's giant, was never able to capitalize on the market shift to smaller, more fuel-efficient cars, brought on by the 1974 oil crisis. Even

mighty IBM initially refused to recognize the advent of personal computers and the accompanying need for software. It took a Harvard dropout, by the name of Bill Gates, to see the potential of that opportunity, and then capitalize on it so effectively that today, Microsoft has an even higher market value than IBM.

The underlying thesis here is that most companies are so operationally focused that they miss major changes and trends that could have brought them huge new opportunities. A major reason for this is their inability to think and plan strategically. The strategic thinking process can be described as the type of thinking that determines what an organization should look like in the future, coupled with the strategic plans of how to get there.

There are various reasons that do motivate people to think and act strategically: to control the organization's destiny, to realize that relying on current operational success is no guarantee for the future, to get out of current difficulties, to share common vision and a sense of teamwork, to win more resources for the business by clarifying the strategy, to explore major new opportunities, and to provide continuity for future leadership.

Strategic planning can have an immensely positive impact on temples. An initial thought is that long range planning would come naturally to synagogues. After all, temples have been running programs for years, and many of those activities required extensive planning. While this may be true, it is helpful to view synagogues from an organizational perspective. Often temples think primarily in terms of meeting their immediate religious needs, but resist discussions of matters regarding vision and planning. Synagogues must re-think this tendency and become less reactive to needs and more proactive to vision.

Current synagogue programs should be evaluated to determine whether or not they are consistent with the temple's mission. Often, boards of directors are swayed by a person or persons whose personal visions and energy influence everything they do. This influence may have either a positive or negative effect on boards; however, eventually power and vision must be shared by the majority leadership. It is human nature for new leaders to automatically think that whatever has gone on before their arrival has less value. A long range plan will allow temples to identify and document the exact goals they wish to accomplish, taking into account ideas of former leaders and building upon the strength of their merits.

The benefits of planning are numerous. Planning focuses vision and addresses what may ultimately be achieved. Priorities are established and timelines are identified. Opportunities are recognized, as well as correct moments to seize them. Progress may be monitored and quantified. An opportunity to inventory assets and liabilities is accomplished by looking objectively at the large financial picture. Aspirations and strategies are connected, and the best path to reach the destination is determined. Changes from within and outside the organization can be predicted and factored. The success of these initiatives depends upon the ability to focus change where it is both desirable and possible.

The planning process involves a hierarchy of results which assist in clearly delineating the relationship between why the temple exists, what is hoped to be achieved, where and when it will be done, and how the tasks will be accomplished. The first stage in the planning process is to state the temple's purpose. Purpose refers to the ultimate results desired. Usually the purpose is well beyond the reach of the group alone. For example, the temple may propose to serve every Jew in the community. This is perhaps an unrealistic, yet nevertheless grand

purpose. The next stage is to set goals to refine the aim to a level that might be conceivably reached. A goal could be to increase affiliation among young families. This goal is more specific than the purpose, yet it still lacks a dimension that is precise and quantifiable. A third category is objectives, in which the temple's immediate aims are stated in specific, quantifiable, and time-related terms. An objective might be to enroll 25 young families in the temple before the next High Holy Days. The final level is strategies, referring to the methods used to get the job done. One method might be a marketing campaign, offering free six-month memberships to young families joining the temple during a certain time period.

The executive director or administrator plays an essential role in the long range planning process. He or she may be an excellent resource in developing the plan, possibly possessing prior skills or experience in writing such plans. The executive director becomes the key player because of his or her overall knowledge of synagogue programs, direct relationships with staff, and ongoing congregational contact. He or she should meet with the vice presidents to coordinate the composition of the plan, produce and reproduce the actual document, as well as manage the ongoing utilization and updating of the plan. The executive director must understand the overall vision of the long range plan and provide continuity to the ever-changing board of directors.

The steps of planning begin with the selection of the long range plan steering committee. There are some individuals who need to be involved with the steering committee because of their perspective, expertise, or position within the temple. There are others that should be involved, because they demonstrate enthusiasm and commitment to the process. A chairperson or co-chairpersons should be identified, and a meeting with the president and rabbi of the congregation

should be arranged to secure their input and direction. It is essential that the rabbi and president accept the premise of planning out several years at a time and be receptive to change.

Equally important is the formation of congregational focus groups. Selected members from a cross section of the temple should be invited to participate in planned focus groups. In addition, an open forum is valuable, in the event that an interested person is overlooked. Questions should be pre-compiled dealing with several key areas, and input of each group should be recorded. A summary of the focus group results is critical for the board of directors to study to assess the needs and desires of the congregation. Five or six general areas of concentration should be identified before proceeding with the writing of the plan. Some suggestions for these concentrations include: programming, religion, facilities, financial, membership, and education.

An important consideration to the success of planning is to record key assumptions or ground rules, under which the plan is based. Some examples of assumptions could be: the same rabbi will most likely be employed by the synagogue for the next five years, no major building renovation or replacement is being planned, High Holy Day services will be held on-site, and the overall economy will be sufficiently healthy to support dues increases. These types of assumptions are the starting-off points for constructing a long range plan.

Because most temples never stop to analyze the reasons why they are successful, the board of directors and staff should be asked to define the temple's purpose in a single sentence. The variety of their responses may be quite surprising. For example, someone may say that the temple is there to provide spirituality for its members. Another may say that the central mission is to educate children. Still another may insist that the temple be a community gathering place. Therefore, it is critical to construct a mission statement. The mission statement of Temple Beth

Sholom of Orange County, California evolved after several attempts to read, “Dedicated to making our congregation a focal point of Jewish family and communal life for our members, through excellence in professional and lay leadership, education, programming, and spirituality.” It is only after the board reaches a consensus about this most basic issue that the real work of grappling with future planning may proceed.

When engaging in a planning process, various factors, which have effected the temple throughout the years, should be researched. In order to decide where the temple should be heading, it is imperative to figure out where it has been. That means going on a fact-finding mission. Previous annual reports and financial statements for the past five or so years should be studied. Long-term members should be interviewed about their temple experiences and memories. Investigating historical data on membership statistics, programs and old fund-raisers may be helpful. A hard look should be taken at the community and the demographic profile of the congregation. The economic stability of the synagogue, as well as other temples operating in the area should be considered. All of the pertinent data that describes the temple within its community should be collected and evaluated.

Once the data has been sorted for relevance, it should be reconstructed into a useful format. Strengths, weaknesses, opportunities and threats should be identified. Current programs should be evaluated to determine whether they support the temple’s mission statement. The needs of the community should connect to the goals of the synagogue, taking into consideration the temple population and the community’s state of economic development. Finally, area synagogue programs which compete with efforts of the temple should be evaluated.

After these questions are answered, conclusions should be drawn. Perhaps the new temple preschool opened last year is not thriving because of excessive competition in the area. Or, maybe the community remembers the congregation for a lecture series held five years ago but discontinued. A great exercise for the planning group is to project exactly what the temple will look like three years from now - if nothing changes. Programs currently offered and numbers of congregants served should be recorded. Projected dues and fundraising income is essential to evaluate. The temple facility and equipment should be assessed for repair and replacement.

The actual writing of the long range plan is ready to commence. There is no magic to speeding this task along. It is the most time-consuming, frustrating, yet exciting part of the process. For every goal, a set of reasonable objectives must be established. For each objective, specific strategies or action steps should be laid out. A realistic timeline should be constructed, followed by a close examination of the opportunities and risks in each area. Planning is the art of “dreaming with your eyes wide open,” and together those dreams should be refined into a precise, quantifiable, and time-related organizational plan.

Figuring out what the plan is going to cost the temple is especially significant. The budget will undoubtedly provide a reality check on the plan. Good ideas usually cost money, and the challenge is to determine how much, when needed, for how long, and whether new actions will spur fresh sources of income. Most likely, budget projections will send the committee back to the early planning stages to decide what is essential and what can't be afforded at the present time. Remember that planning is as valuable when it reveals what can't be done, as when it identifies what might be attempted. At the end of this paper, I will include the current long range

plans of Temple Beth Sholom of Orange County, California and Temple Beth El of Great Neck, New York, to illustrate different formats used for plans.

The plan has now been written. What will be done with it? The synagogue won't be helped much by an elegantly bound, expensively printed assortment of fancy charts and diagrams that simply sit on the shelf and collect dust. The key to the ongoing success of the plan is to keep it updated. At Temple Beth Sholom, we revise and evaluate the plan every six months. Before the start of each fiscal year, the vice presidents and other officers responsible for a portion of the plan, call meetings with their respective committees. There, they review the year just ended, carrying over unfinished tasks, dropping off completed items, and adding another year of goals and objectives to the end. Adjustments are made to the timing of projects or to the cost of producing a program, if factors have changed. All of the research associated with that particular section of the long range plan is done at this level. When the drafts of the sections are completed, vice presidents present their areas of the plan to the general board. Following board approval, the sections are compiled into the master long range plan, copied, and distributed to the board for insertion into their board notebooks for referral during the term. Then, after a six month period, the vice presidents again come before the general board with mid-year evaluations of their corresponding sections. These reports are generally short in nature and serve as the quantifiable measure as to whether the plan is being followed.

A critical area to consider is the regular communication of the long range plan to the congregation. Synagogues attempting to bring about change must offer their congregants experiences that will lead them to reconsider their deep-seated attitudes and beliefs. Initially, when Temple Beth Sholom's plan was first conceived, our president introduced it at the annual

congregational meeting. A few months later, the long range plan was the focus of his High Holy Day address. Semi-annually, the long range plan is highlighted in our temple bulletin, allowing congregants an opportunity to follow the progress of the plan.

Finally, the draft of the long range plan has been shaped and shared, and the parts that collide with fiscal reality have been revised. It is time to begin implementation of the changes, but the full job is not over yet. These important questions should be asked: How clearly are the implications of the changes understood by your membership? How prepared are the board and staff to educate the congregation in understanding why these changes are both positive and necessary? By asking these questions and projecting the perspective of the diverse constituencies within the synagogue, the move from merely legislating change to successfully enacting change is accomplished.

A well-constructed plan will have a gratifying impact upon congregants. They will be pleased to see the board of directors thinking ahead. Long-range planning shows initiative, and initiative has its own set of rewards. The plan will be an excellent public relations tool; unaffiliated people may begin to take notice of the new happenings at the temple. Congregants will be watching the long range plan to see what is coming next. The plan will assist in the internal evaluation of how the synagogue is doing.

In conclusion, it is important to remember that it is not the plan that is being reviewed, but the temple's progress toward fulfilling its long range purpose and goals. Once the plan has been successfully written and diligently monitored, the plan will enable the synagogue to evaluate their objectives with far greater detail than would likely be remembered. Long range planning is

critical for temples in forging successful paths, because “if you don’t know what direction you’re heading...any path will take you there!”

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