"Membership Strategies: Reengineering the Synagogue"

FTA Thesis

submitted by:

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Introduction

One of the greatest problems facing the organized Jewish community is lack of participation in synagogues. Temples were once the center of Jewish life. This is no longer true. Recent surveys have shown that over 70% of all Jews nationwide and up to 80% living in the San Francisco Bay Area do not belong to a synagogue. However, as Rabbi Schindler has said, "85% of American Jews belong to the synagogue at one time in their lives." Much has been written about the growing rate of non-affiliation among Reform Jews. Task forces have been mobilized, a whole department was created within the UAHC and local communities have begun to give attention to this topic. The issue of Jewish continuity has become the battle cry of Jewish groups nationwide.

The problem of non-affiliation is not a new one. Since the 1970's, temples have been aware of the changing Jewish family. Some temples have acknowledged the changing needs of its constituency but either have not dealt with the issue or not delivered their message to the member and non-member alike. Most temples are under the impression that, to paraphrase the movie "Field of Dreams", "If they build it (the temple), Jews will come".

The reality which we must begin to face is that if we were doing the right things, offering the right programs and getting our message across, 70% of the Jews would not be unaffiliated. The underlying problem is that most temples have an inability to fill the needs of our existing members let alone fill the needs of the non-member.

Dr. Gary Tobin, Chairman of the Maurice and Marilyn Cohen Center for Modern Jewish Studies, Institute of Community and Religion at Brandeis University, has written and spoken about the drawbacks of traditional approaches to temple membership. The ideas and programs suggested by Dr. Tobin are at the leading edge of Jewish religious thought. "Marketing for Congregations" a recent book by Drs. Shawchuck, Kotler, Wrenn & Rath is a compilation of case studies on church and temple affiliation. The book suggests that applying the marketing techniques of the business world to religious institutions is the right approach to reach the "unchurched". There have been many books written about the changes in American business. Some of the books reviewed for this paper include "In Search of Excellence" and "Thriving on Chaos" by Tom Peters, "Reengineering The Corporation" by Michael Hammer and James Champy, "Growing a Business" by Paul Hawken and "Marketing Mistakes" by Robert F. Hartley. The underlying themes expressed in these books are that to survive in a changing world, we must radically alter the way we do business.

This paper will analyze how the changing dynamics of American business relate to the themes of Dr. Tobin and "Marketing for Congregations". We will examine how Temple Emanu-El began the process of implementing these ideas into its new Vision, Mission and Goals and Membership Strategic Plan. The synagogue of the 21st century must embrace the lessons of American business and the new marketing concepts if it is to once again reclaim the title of the center of Jewish life.
Reasons for Non-Affiliation

"Even though American Jewry is at its most prosperous - by measures of wealth, education and freedom - the Jewish community is facing great threats to its survival. Synagogues, once the center of Jewish life, no longer attract most Jews." There are many causes given for the current lack of affiliation by American Jews. Many say that the problem lies within the success and prosperity of the current generation of American born Jews. These are not the Jews who immigrated during the late 19th and early 20th centuries. These are not the Jews who lived on the lower East Side and survived the depression. These are not the Jews who fled Europe during the second world war. The demographics indicate that the largest group of American Jews are between thirty and sixty years of age and were born between 1935-1965. The oldest in this group grew up after World War II and attended college beginning in the 1950's. The youngest of this group are the "Yuppies" of the baby boom years who were born in the 1950's and early 1960's. They grew up in turbulent times attending college during the war in Vietnam and the post "hippie" years of the 1970's. For both of these generations of American Jews, they are the first to experience a very low degree of anti-Semitism, a tremendous amount of corporate and business success, a high level of income and wealth and are as educated as any other American demographic group.

This group is also the most assimilated American Jews in our history. They are not from the old country trying to keep practicing the Judaism of the shtetel. They do not primarily come from Orthodox backgrounds. These Jews of modernity are trying to balance very secular lives while keeping alive their Jewish faith. Judaism is not necessarily primary to their lives as it was for their parents or grandparents.

"Approaching the synagogue as consumers, these Jews buy only what they need, when they need it. Because the focus is on the self, rather than on the larger community, they expect the synagogue and its members to be available to meet their needs." Why is this so?

There are many underlying reasons for this "consumer approach" to synagogue use. Some of the reasons include: 1) the rise in interfaith marriages, 2) the growth of single parent families, 3) the number of families with two working parents, 4) a greater number of older adults living independently well into their 80's, 5) the struggle between secular life and the need to be connected to Jewish life, 6) the lack of spirituality in the temple, 7) young single Jews who put careers first and building families second, 8) a larger number of divorced Jews over 40 and 9) the high cost of temple membership.

The concept of a nuclear Jewish family, the mainstay of synagogue life in the 1960's-70's, just doesn't exist in the majority today. The list above suggests that we, in fact, are not one homogenous Jewish national group, but a group made up of much smaller segments with different needs, hopes and dreams.

In "Marketing for Congregations", the authors suggest that temples and churches should look at their members the way that American business looks at its customers. Marketing analysis shows that there are indeed a multiple number of market segments within the population. The needs of
one group do not necessarily conform with the needs of another group. The authors go on to say that "Market segmentation is the process of classifying the population into groups with different needs, characteristics, or behaviors that will affect their reaction to a religious program or ministry offered to them." 

From these insights, it is clear that the needs of single parent families may be different from interfaith families. The active, employed sixty-five year old is not the same senior citizen as we saw ten years ago. The two income young family of 1995 is far different from the nuclear family of the 1970's.

Lyle E. Schaller, a church planner, says that "the emergence of the megachurch is the most important development of modern Christian history. In today's world, big churches are more attractive in that they offer a broad range of choices in teaching, scheduling and programming. It is a part of consumer orientation, people today expect to make choices about things." 

On Yom Kippur we read from Deuteronomy, Chapter 30, "See, I set before you this day life and good or death and evil....Choose Life." Temple leadership might learn from this parasha and begin to apply the underlying concept of choice to the affiliation problem before us.

Programs and activities are, for the most part, similar to those of the past thirty years. Except for family education programs such as the "Reclaiming Shabbat" currently being implemented in Houston and the very successful "Stepping Stones" pioneered by Congregation Emanu-El in Denver, little has really changed. It seems that tradition means that we replicate programs year after year improving on them by looking at the logistics, some content, but not really examining the underlying premise of the programs. True evaluation of programming must begin with the basics: 1) why did we offer this program?: 2) who was the program for?: 3) what was to be accomplished?: 4) did we accomplish our goals?: and 5) how was the attendance?

In a recent workshop sponsored by the Koret Foundation, a rabbi of an 1 100 member congregation said that "we can not measure our success by how many congregants did not attend but rather on how the quality of the program was for those who did attend." He feels that quality programming is our goal and that quality programs will attract more unaffiliated Jews. There is no question that the quality of our programs keeps improving and that the teachers and staff are far better trained today then ever before. If this rabbi's position is correct then the number of unaffiliated should have decreased over the past decade. This clearly is not the case. Again the old philosophy of "If we build it, program it, offer it, Jews will come" if only fifty members show up to a program and walk away feeling good, yes, the program was a success for those fifty people. But what of the other 3,000 people we serve. For many of us, including Temple Emanu-El, it is the same 50 or 100 or 200 who take part in most of our programs. We are only reaching a small percentage of our own membership. Dr. Tobin believes that the participation rate of members in Jewish congregations is 20%. There are those who say you can not evaluate a program by the numbers. However, ignoring the participation rates is turning our backs on reality. At Simchat Torah, Temple Emanu-El has the same 150 people in attendance, year in and year out. What of the other 2,500+ who stay at home. Is it not our responsibility to bring them into the Simchat
Torah worship experience? If we are not successful with our own constituency, how then can we reach the unaffiliated? The reality is that a 30% affiliation rate does not equate with success. It is time to set aside the antiquated view of success. The impacts which Reform Judaism could have on American Jewry are endless. While Rabbi Schindler says that "we should open our doors to the unchurched non-Jew, others are realizing that we do an unacceptable job reaching the unaffiliated Jew. A new approach must be in the offing.

A Change in Business Theory

"The 1980's marked the beginning of a major revolution in American business. Books and articles began to document the decline of customer service and the subsequent attempts by some organizations to gain a competitive advantage by delivering improved customer service." If we take a closer look at this fundamental change in American business, we may see that many of our institutions take the product approach rather than a customer approach. We offer programs for those that show up rather then creating programs to attract a larger portion of our members.

In 1981, Scandinavian Airline Systems (SAS), posted an $8 million loss. A new president, Jan Carlzon, embarked on a major turnaround. The plan turned the entire company into a customer service organization. Each of the 20,000 employees was empowered to focus on the customer and his/her needs rather than the SAS handbook of rules and regulations. Carlzon was able to create the environment of service and communicate his expectations so that his staff could rethink their mission and look beyond their previous concepts of business. The results were that two years later the company earned over $50 million. "Carlzon says that we have 50,000 moments of truth every day. He defined a moment of truth as any episode in which the customer comes into contact with any aspect of the organization." This moment of truth is just as relevant for a church or synagogue according to "Marketing for Congregations".

The book goes on to cite examples of both excellent and poor situations among religious institutions. Among those cited for excellence is Valley Beth Sholom in Encino, CA, where Rabbi Harold Schulwies has put together a large group of lay volunteers to continually be his eyes and ears within the congregation.

While "Marketing for Congregations" focuses on the marketing changes in American business in the 1980's, the first changes began in the 1970's. As a result of the oil embargo and long lines at gas stations, the consumer was searching for a better approach. The Japanese auto makers offered to fill the needs of the customer by providing small, four cylinder cars which maximized fuel efficiency at an economical price. While Japan was listening to the customer and making quick changes to meet their new needs, Detroit was still building six and eight cylinder gas guzzlers. The result was the rapid growth of the import car market and the decline of the big three auto makers in Detroit.

The successful American and Japanese corporations of the 1980's and 1990's all have a strong customer service orientation. This customer service hall of fame includes the likes of Wal-Mart, Nordstrom, Lexus and Honda.
The traditional management model based on Adam Smith's "The Wealth of Nations" has been replaced by this customer orientation according to Michael Hammer and James Champy in their book, "Reengineering the Corporation." The reality that organizations have to confront, is that the old ways of doing business simply does not work anymore. The old model broke down every phase of business from production to distribution into its simplest form. Centralized management was a key element with decisions residing at the top. According to Hammer and Champy, "Business Reengineering means starting all over, starting from scratch. Reengineering means putting aside two hundred years of industrial management. It means forgetting how work was done in the age of the mass market and deciding how it can best be done now." There are three major forces driving today's companies according to the authors: Customers, Competition and Change.

**Customers** want to be served and served well. Price is not the only factor in making a buying decision. Two examples of this customer focus are at Whirlpool and Nordstrom. At Whirlpool, when a customer calls for service, the call is routed to the same service representative whom the customer spoke to last time. This creates a sense of personal relationship and intimacy in a world of 800 numbers. At Nordstrom, a customer who returns merchandise is never hassled. A cash refund is offered no matter when the merchandise was purchased and whether or not the merchandise was worn. A story was recently told to me by a friend who had returned from a business trip. He had forgotten to pack a pair of tennis shoes which were needed for an outing with a client in the morning. The hour was late but he went in search of the shoes. After trying several stores, he came across a mall with a Nordstrom. It was 10:00 p.m. and the store was clearly closed but he saw workers still inside. After knocking on the door, a clerk opened the door and my friend explained his dilemma. The clerk took him over to the shoe department and within fifteen minutes, my friend had his new pair of shoes and was on his way. The store had been closed since 9:30 but the clerk took it upon herself to make a customer happy. This type of service may seem to cost some dollars in the short run but it certainly strengthens the long term customer relationship.

How many times have we told a member that we can not do something because of policy? It is sometimes easier to say no and send a member on their way than to take the extra step to accommodate them or explain the decision. This does not mean that the customer or the member is always right. It means that we communicate to our members will influence how they feel about our institutions. It is not the answer that we give as much as the way that we give it. Much has been written about the top down method of management versus the team approach to management. American businesses have traditionally made their decisions at the top, by management, and then forced the work force to accept the decision. Japanese management has stressed a team approach to decision making by empowering every worker, line or staff, to take part in the decision making process. This too, is a lesson which can be adapted in the synagogue. Process is sometimes more important to our members than the actual answer we give them. Prior to my life as a temple administrator, I spent over fifteen years in the corporate world, primarily in banking. In 1977, the senior officer I worked with, said that "the object of turning someone down for a loan is to have the customer walk away thinking that we did what was right for his business". This was the emphasis on process, how we think, why we made the decision
and that we considered all aspects of the situation. This conversation had a major impact on my thinking and has been incorporated into my approach to customer or member relationships ever since.

**Competition** may come from a variety of new markets. For American companies this means that Chase Manhattan Bank may be competing with foreign entities such as Barclays or Bank of Tokyo, or other American banks which previously could not do business in New York or even Merrill Lynch, which would not have been considered a bank fifteen years ago. Most temples have considered their competition the other temples down the street. But under the reengineering concept, we must broaden the competitive barriers. What is the competition which prevents the 70% of unaffiliated from participating? It is not the temple down the street. It might be the ballet or symphony, business commitments or time constraints which pull at working families, private schools which demand more parental support both in volunteer and financial resources. There are a multitude of entertainment and sports activities pulling at Jewish families. Much has been written about the over structured lives of our children. This is the new competition facing the temple.

**Change** becomes constant. Every organization, corporation and institution must be ready for change at every turn. While Sears and Kmart are supposedly burdened by their size and their inability to react, Wal-Mart has grown and established themselves as the predominate retailer in America. While department stores have languished in stodgy marketing and merchandising, specialty retailers, like The Gap and The Limited have grown and prospered. When the blue jeans market seemed to stall, Levi Strauss created a whole new market with Dockers. As we can see, change is not always bad or to be feared but rather change can be a catalyst to new markets and new opportunities. In 1985, Coca Cola introduced the new Coke which was the biggest marketing disaster since the Edsel. Quickly, Coke admitted the error in judgement and reintroduced the old coke by renaming it Classic Coke. The following year Coca Cola had its greatest single year in sales after reintroducing Classic Coke. Sometimes, even when we make a change and it turns out to be the wrong decision, we can still recover and move forward.

How then can the Board of Directors react to the three Cs: Customer, Competition and Change and the lessons of American business? Inaction in any of these areas will result in the continued decline of the synagogue and the increase in unaffiliated Jews. Dr. Gary Tobin has researched, spoken and written about these issues over the past ten years. In December 1988, he completed the Bay Area Jewish Community Study, a demographic analysis for the Jewish Community Federation and in 1990, the National Jewish Population Survey commissioned by the Council of Jewish Federations. These reports have been the basis of this paper along with the speeches and writings of Dr. Tobin. In addition, I met with Dr. Tobin on several occasions to discuss his theories and in conjunction with other projects Temple Emanu-El commissioned Brandeis University to complete.

According to Tobin, the synagogue exists for the purposes of providing community, preserving and developing Jewish traditions, preserving and developing the next generation of Jews and providing and developing connections with God. In order to fulfill these purposes, the synagogue must
function as: 1) a community center; 2) an educational center; 3) a human services center; 4) a community services center; and 5) a place of worship.

The synagogue as a Community Center is a gathering place where Jews can meet, socialize and celebrate life cycle events. During the past few decades the "suburbanization" of America, increased job mobility and lifestyle choices has seen the decline of Jewish neighborhoods which were very prevalent through the 1960's. The need for a gathering place is more important today then in the past. Dr. Tobin writes that we must again open the synagogue doors to all Jews and rethink how we offer products and services to members and non-members alike.

The synagogues as an Education Center provides a central place for the Jewish learning experience. This educational center is both for youth, families and adults and should be integrated with Jewish camping and weekend retreats.

The synagogue as a Human Services Center can provide day care, meals for the elderly, fulfill transportation needs and provide mental health services. Across the nation, the Jewish Vocational Services, Jewish Family Services and the Jewish Community Centers are breaking down, according to Dr. Tobin. This will be an area the synagogue can enter into which was previously the domain of the Jewish Federation and its agencies. Recently, we have the rise of synagogue/federation partnerships which are now just beginning to touch the surface of these communal service issues.

The synagogue as a Community Services Center is where Jews can express Jewish values by participating in programs that assist the poor, the hungry, the homeless and the underprivileged in both the Jewish and non-Jewish communities. There are many examples of this type of programming especially in Reform Judaism. For many Jews, this has been their main connection to Judaism. Tikun Olam, the repair of a broken world.

The synagogue as a Place of Worship, is the spiritual center of Jewish life where Jews can experience prayer in a variety of forms of worship while exploring their relationship to God. Many Jews express complaints about not feeling connected to worship and the lack of spirituality. During the past ten years we have seen the rise and growth of the Jewish Renewal Movement whose main emphasis is on spirituality, meditation and worship. Dr. Tobin's recent work with the Koret Foundation in the Synagogue Initiative Project has shown that for most Jews, the current worship services in reform and conservative synagogues are "boring." He says that Rabbis and Cantors must open their eyes to the fact that most Jews are not finding spirituality in the synagogue.

Dr. Tobin also believes that the synagogue is a Center of Administration. There is a complexity to any institution which must serve a multitude of memberships with a large array of programs. In order to serve as all the "Centers" identified by Tobin, the synagogue must be a professionally well managed organization at the forefront of modern management techniques.

Tobin also believes that fundamentally a synagogue must begin to look at itself within the whole Jewish community and not just within its own walls and boundaries. Membership numbers should not be based on how many dues paying members a temple has but on how many Jews it actually
serves or even how many Jews it could possibly serve. For Tobin, a temple must redefine who it serves and how it delivers its programs and service a much larger and new "membership base."

Tobin's "Centers of Jewish Life" align themselves well within the lessons of American business and the three C's, Customer, Competition Change. We must first begin to redefine the three C's in the context of the synagogue. 1) Customer: Who are our temple members and how do we reach those who are not? How do we program for the multitude of markets and "centers"? 2) Competition: What is the impact of competitive forces both inside and outside the Jewish community? How can we work together within our community to build affiliation? How can we program against or in conjunction with the outside forces? 3) Change: What are the appropriate changes we can make? Do we sit back and assume that it will all work out in the end? or do we aggressively make change a positive and planfull component of our synagogues?

**Temple Emanu-El: A Study Of Analysis and Change**

**The Strategic Planning Process**

The purpose of a strategic plan is analyze where you are today and look forward to what might be in the future. It is a blueprint, a road map to guide the congregation. It is not meant to be etched in stone but is, like the Torah, a living document which can take on new meaning with changing circumstances and situations. American business of today is committed to the strategic planning process. Most synagogues have not consistently gone through the planning process and when they do, they fail to look back several years later to see how the plan worked.

Temple Emanu-El had not historically prepared strategic plans on a regular basis. The only major strategic assessment of the congregation took place in 1947 when the congregation commissioned an outside consultant. Gene K. Walker, a business management consultant, reviewed the programs, activities and management of the congregation; interviewed staff and members and prepared a report for the Board of Directors. The report, known as "The Walker Report", is very insightful in that many of the problems which were prevalent in 1947 are once again as relevant in the 1990's.

While the Walker Report was a catalyst for a rabbinic transition in 1948, the strategic planning process of 1993-95 came about because of a rabbinic transition resulting from a congregational crisis.

**Rabbinic Transition**

In February 1992, Temple Emanu-El began the search for a new Senior Rabbi after the previous Senior Rabbi resigned under allegations of sexual harassment. The crisis which Board of Directors faced eventually resulted in an overall evaluation of the congregation, its members and their needs and the development of a new mission, vision and goals statement. The year 1991 ended in
disaster but by the High Holy Days of 1993, the congregation was on the road to becoming the strongest it has been since the early 1960's.

In February 1992 the process of searching for a senior rabbi was beginning. Several congregational meetings were held and members were asked what their key issues and concerns were and how this effected the search for a new senior rabbi. It was clear from the discussions that Temple Emanu-El was not one congregation with one group of needs and desires but many smaller diverse groups of individuals which when combined became the "Emanu-El Jewish Community." The staff had spoken about the diverse needs of the congregation prior to 1992 but it was not until these groups came forward to discuss their wishes concerning a new senior rabbi that the Board and staff really took a serious look at how the demographics of the congregation had evolved and how these needs would be served in the future.

The year 1992 continued with discussions both large and small as the search committee and the Board of Directors continued their work. In March 1993, the Board of Directors elected Stephen S. Pearce as its new Senior Rabbi effective in July 1993. Rabbi Pearce joined Temple Emanu-El after serving some fifteen years at a smaller but equally diverse congregation in Stamford, CT, which served the metropolitan New York area. Rabbi Pearce was well suited for the "reengineered" Temple Emanu-El which had begun to take form.

Membership Survey

A membership survey was prepared for the congregation by staff with assistance from Professional Audits, Inc. The purpose of the survey was to explore a number of issues as well as obtain updated demographic information. Much attention was given to the kinds of questions asked and how they were phrased. The survey included 26 questions. Some questions asked for the response on a rating scale of 1-5 to seek analysis of how well we were doing. Other questions explored priority of needs and asked members to choose 3-5 choices from among 10 or 20 possibilities. The survey was mailed to all congregants in September 1993, with spouses and partners receiving separate surveys. The total number of surveys mailed was 2,365. The number of responses received was 549 or 23%.

Survey Results

The largest response, 53%, came from members who have been at the temple for over 20 years. This group makes up only 35% of the current membership base, so they tended to respond at a higher rate than other members. The 5-20 year members made up 24% of the responding group and the balance of responses came from those members with less than five years of membership. We should note that 77% of the congregation did not respond. According to our consultants, a 23% overall response rate is considered good. The open question still exists as to whether a 23% sampling, with a larger portion, 53%, of the respondents from one segment of the population, can be representative. In any event, the Board of Directors did in fact rely on the survey and made decisions based on these results.
Some of the survey results:

Aside from providing a place of worship, 59% said that the temple's primary purpose is to be a center of Jewish life and life cycle events. 25% said that the temple's purpose is to provide for Jewish continuity while only 9% felt the purpose was primarily education.

On a scale of 1 to 5 (with 5 as the highest), the quality of the temples programs, activities and worship experience were all between 4 and 4.25. The top four most valued programs and activities were religious worship, 74%, life cycle events, 48%, youth education and activities, 35% and adult education, 29%.

As discussed earlier, the strain on members is greater today then at any time in American Jewish history. The question about personal involvement in the temple received ratings under 20%.

As for outreach to the non-affiliated, 83% said that the temple should provide services to our memebrs and to the community at large. Only 8% responding that the temple should only serve its members.

**Board Retreat 1993**

The survey and results were being reviewed by staff and our consultants as the Board of Directors Retreat was being planned for November 1993. The President, Senior Rabbi, Executive Director and Development Director, working with an outside facilitator, planned the agenda for the retreat. The areas covered at the retreat included:

1. Membership Market Segmentation  Who are our members?, Why do they join? Why do they leave? Why people don't join?

2. What is Temple Emanu-El's role in the Jewish Community, the Reform Movement and the secular community and where will the congregation be in the year 2000?

3. How do we handle governance and management?

4. How do we balance the temple's activities and programs for members with the need to provide services to the non-member and the secular community

5. A report and discussion of the membership survey and results

6. Where to we go from here? An action plan for the future.

The results of the retreat were promising. For the first time in many years the Board took a look inside the congregation and realized the future will be built on how the temple fills the needs of our members and the unaffiliated Jewish community.

An action plan was developed by the end of the day calling for three Ad-Hoc Committees to be
established. One committee was charged with the task of developing a new Mission Statement along with a broader Vision Statement and a list of Goals. A second committee evaluated our entire membership process with a new emphasis on Recruitment, Integration and Retention. The third committee reviewed the Leadership Development process and made recommendations that aimed at being a more inclusive organization.

The three committees were formed from within the whole congregation. Committee members included long time members and newer members. Singles, families, seniors, single parent families and interfaith families were all well represented. The committees were gender and age inclusive to reach as many segments of our community as was possible.

Vision, Mission and Goals

The Vision, Mission and Goals Committee ("VMG") worked on developing a new Mission Statement which better reflected who we are as a congregation. The facilitator who worked with the Board of Directors was engaged again for the VMG committee. It was felt that having a facilitator would allow the committee members more time to focus on the task at hand. The committee was staffed by the Development Director in concert with the Senior Rabbi and the facilitator. The VMG committee met four times over a six month period.

The Senior Rabbi prepared a general statement of vision as a basis for the initial discussion. This assisted the committee by outlining some of the key goals of Reform Judaism and the congregation's historical perspective on programming while at the same time including new ideas from the new Senior Rabbi. The VMG committee wrote a new Mission Statement and Vision Statement. This was completed during the summer of 1994. The presentation to the Board of Directors was made in September, but approval was delayed until after the two other Ad-Hoc Committees completed more of their work and the entire process could be discussed at the November 1994 Board Retreat.

In September 1994, the Senior Staff took the completed Mission and Vision Statements and began to outline goals for the next three to five years. Each bullet point of the Mission Statement was examined. Emphasis was placed on looking at existing programs and how they should be expanded, changed, or in some cases terminated. New programs were discussed which might be added to fulfill the new Mission Statement. The short and long term goals developed by the Senior Staff became the framework for the 1994 Board of Directors Retreat.

The work of the Leadership Development Ad-Hoc Committee is not directly related to this paper on membership strategies. However, it must be noted that a new stronger commitment to developing future leadership, in a planned organized manner, is an important component in the overall strategic plan. As future leadership is identified, cultivated and trained, these future leaders will also be a critical catalyst to affiliation by strengthening our existing membership base and identifying new members to fill the needs in the area of leadership and management. As Tobin writes, the temple is also a center of administration. This is a slightly different interpretation of Tobin's thoughts but one which can be utilized to the synagogue's advantage.
Membership

The Membership Ad-Hoc Committee was led by three Board Members who participated in the 1993 Retreat and wanted to make an impact in the area of membership. The Board of Directors, at its retreat, identified the three main components of membership which are: 1) recruitment, 2) integration and 3) retention; the charge of the ad-hoc committee was to examine how we deliver our services to our membership and recommend a new direction for the congregation. Each co-chair was asked to read "Marketing for Congregations" and the "The Life Cycle of Synagogue Membership" as research material to apply to the task ahead. The Membership Director of the temple served as staff to the ad-hoc committee.

The ad-hoc committee developed a three fold approach to membership based on recruitment, integration and retention. Every part of synagogue membership was explored and examined. The committee reviewed how the first phone call is handled and every step on the path to affiliation. They discussed how members become involved once they join as well as what brings someone to the point of resignation. It became clear from the discussions that personal contact, understanding members needs and how we serve our members were critical at each step of the membership cycle.

The report to the Board of Directors was developed with the idea that to be really effective, we must recognize that recruitment, integration and retention were three very different aspects of membership. The key recommendation of the ad-hoc committee was to eliminate the existing membership committee and create three new committees based on the three rubrics of membership; recruitment, Integration and retention. The report also recommended creating a marketing strategic growth plan, redefining how a member is handled during their first 18 months of membership and personally contacting every member who is at a critical point where resignation tends to occur. The three co-chairs agreed to become the chairs of the three new committees.

Implementation of Marketing Plan

At end of 1994, the new Vision, Mission and Goals marketing piece, approved by the Board of Directors at the November retreat, was mailed to the congregation. It included the new Mission Statement, Vision Statement, Leadership Development Report and the Membership Report. By January 1995, the three membership committees had begun to implement the recommendations of the ad-hoc committee.

Integration

The Integration Committee was the first new committee to begin its program. In the fall of 1994, we instituted a new member orientation following the October Board meeting. All new members were invited to meet the Board and staff. A history and overview of the temple was given and the Board of Directors and temple staff members were introduced. The presentation was short and to the point with a social hour following. Each member was given a welcome to Emanu-El packet which included summaries of programs and activities. There was a list of important phone
numbers and related staff members. An explanation of the process for scheduling a life cycle event was discussed. The goal of calling every new member after they join the temple was successful. The idea of matching every new member with a "buddy" family for the first eighteen months, was not successful. The reason for its failure, the inability to come up with 85 buddies the first year. The old method of dropping off a Shabbat welcome basket (which was delivered to more doorsteps then people) was scrapped. It is believed that one's first contact will influence their long term relationship with the temple. The first 18 months are the most critical to a life long membership. The Integration Committee is developing additional contact programs for the newly affiliated. Since the "buddy" system was not successful, regular phone contact with each new member during the first eighteen months is now being implemented. Special Shabbat services and informal meetings in member's homes with the rabbis and cantor are also being instituted. It is too soon to tell what the long term impact of this new integration approach will be. However, it is clear that the initial impression of a new member is most times the long term impression of the congregation.

Retention

The Retention Committee first started with a small Ad-Hoc group of twelve marketing and sales professionals within the congregation. Their focus was on how to shut the revolving door of membership. They examined all the resignations from the past few years in broad categories. They looked for similar groupings or reasons for the resignation. Patterns soon became apparent. Some of these included families whose children just completed B'nai Mitzvah or Confirmation, Young Married who join for two or three years and then resign to rejoin when they have children of school age; the empty nest family and seniors with 25-35 years of membership who move to retirement homes or can no longer make it to the temple from their homes. It was the conclusion of the ad-hoc group that some members are more susceptible to resignation at certain times in their lives. A solution would be to increase their positive contact with the temple in the years just preceding these critical moments.

The next step was to prepare an action plan to increase the exposure of these potential lost members to the temple through direct member to member contact. A retention committee was then staffed with about twenty members. The roll out of the action plan was not up for discussion but rather the ad-hoc committee explained the issue and the proposed solution. Each retention committee member was given ten to fifteen members to personally contact. A questionnaire was created to promote dialogue between the retention committee member and the temple member. The calls began and the "high touch" contact and dialogue began. It is still too early to quantify the results of the new Retention Committee. The initial response has been gratifying in that over and over again the member being contacted was thrilled with the phone call. The membership survey of 1993 has now evolved into an ongoing retention program with direct phone contact. The answers to the questionnaire will be distributed to senior staff for review and analysis and in the future the results will also be discussed with the Board of Directors.
Recruitment

The recruitment committee chair and the Executive Director formed a small ad-hoc marketing group to prepare a membership recruitment growth plan. The plan, once drafted, was to be rolled out to the new permanent Membership Recruitment Committee. The ad-hoc group consisted of members from the marketing, public relations and advertising industries. Each committee member reviewed the 1988 Jewish Community Federation demographic study prepared by Dr. Tobin, the book, Marketing for Congregations, as well as the Winter 1995 NATA Journal on Membership.

The group presented the Membership Recruitment Marketing Plan to the Board of Directors for approval at the June 1995 meeting. As this paper is being written, plans to communicate the membership growth plan to the entire congregation are in process for printing in the September 1995 temple bulletin.

The essence of the plan is to call upon our existing membership to assist the Board of Directors in a five year growth plan. In business, you always work your existing customer base for referrals. This concept is the fundamental basis for the growth plan. The goals of the recruitment plan are two fold: 1) lower the non-affiliated rate in the San Francisco Bay Area and 2) increase the membership from 1,450 to 2,000 members by the year 2000, which is the 150th anniversary of the congregation.

The recruitment committee, supported by staff, will be implementing a reward and recognition program for the new member referral program. A name has not yet been chosen for the membership referral program but the rewards will include 1) a special recognition Shabbat, 2) reduced dues for a specific time period, 3) special tickets and seating at events of the congregation, 4) special recognition pins, art and/or paperweights and 5) honors by the Rabbis and Cantor.

In addition, some new membership marketing strategies are also being considered. These include: 1) voluntary membership dues for all new members 30 and under (implemented July 1, 1995); 2) new post-confirmation and college memberships; 3) special college mailings and increased involvement from the Senior Staff; 4) going on-line with Emanuelnet@aol.com to reach out to members, non-members and our college membership; 5) new first year free membership policy for weddings officiated by our clergy; and 6) voluntary first year dues for all new members with a special part time staff person dedicated to new members through the 18 month integration period (subject to funding currently under consideration). Some of these ideas are new, such as voluntary dues programs, others, like the wedding program, have been tried before but failed in the past due to poor execution on the temple's part.

Lastly, a drastic change in advertising programs is also under review. In 1990, the temple spent $52,000 for a weekly full page in the Jewish Bulletin of Northern California. During 1991-1994, the budget was slowly reduced to $12,000 per year. The reason: non-affiliated Jews primarily are not connected to the organized Jewish community. Since the Jewish Bulletin's primary mailing list is Federation donors, the advertising in the Jewish Bulletin, is on the whole useless for reaching the
market we intend to reach. If the purpose of the advertising budget is to keep up our image in the Jewish community, the Jewish Bulletin, is the place to be. However, if the purpose of our advertising is to reach the non-affiliated, then a new approach must be undertaken.

The temple tested two ads in the San Francisco Chronicle, (morning) and San Francisco Examiner, (evening) in 1993 and 1994. A free Hanukkah Home Celebration Booklet and a Passover Haggadah were offered in the ads. The ads ran twice in each paper. The Hanukkah ad had over 350 responses. The Passover ad had over 600 responses. We also tested the San Francisco Business Times to reach the emerging business and professional market. These publications represent the main stream media which the non-affiliated Jews are reading. After these tests and discussions with Dr. Tobin, this writer believes that a multi-faceted media campaign should be developed. The campaign should include newspaper, magazine, direct mail, radio and cable television advertising and public service announcements (PSA's). It is clear that reaching the over 200,000 Jews who are non-affiliated, will mean finding innovative ways to communicate with them. The authors of "Marketing for Congregations" have dedicated a chapter and several appendices to advertising and public relations. If there is one thing we can learn from the evangelical movements, it is that positioning ones institution and clearly articulating the mission and vision to the non-affiliated and assuring the message is received, does indeed bring results.

**Conclusion**

There have been many instances throughout our history when the survival of Judaism has been at a crossroads. Each time, someone or some group stepped forward to help our people back from the brink of disaster. In the Torah, we read of Joseph, who saved his brothers and of Moses and Aaron leading the Exodus. We retell the story of Purim and Queen Esther and the story of Hanukkah with the bravery of the Maccabees. In modern times, we have the diaspora from Eastern Europe in the late 19th and early 20th century to America; the devastation of the Holocaust which some believe ultimately led to the creation of the State of Israel. At each moment of history, a grave situation has in time turned towards the promise of freedom.

Now, American Jewry is at its own crossroads. We are facing an even greater crisis; an internal one; one not easily seen as a threat but a grave threat nonetheless. There are Jews who feel disenfranchised, even alienated or worse yet assimilated to the point where Judaism has lost its meaning. The choice between life and good or death and evil may just be redefined as the choice between choosing to live a Jewish life or choosing to give up our Jewish heritage.

The lessons of American business should not be lost as we face the challenges ahead. The task of redefining who we are and what we stand for. The task of reestablishing our position in the marketplace. Ford, faced with lost market share and lost confidence to Honda Accord and Toyota Camry, took stock and developed the Taurus as a new and better product. Nordstrom has taken its place as the preeminent provider of customer service and has not given up ground. Levi Strauss, when faced with a stagnant jean market, redefined itself with the Dockers product line and has gone so far as to teach seminars in upscale casual dressing to corporations as a way to increase the demand for more Dockers products.
Reform Judaism should look forward to the opportunity to recapture the "Jewish marketplace". The member or non-member as a Customer, a realization that Competition does indeed exist and finally that Change is necessary to preserve our position and once again move forward. The three C's are not just the buzz words of the reengineered corporation, but should be the buzz words of the reengineered synagogue. We must be a vibrant exciting place. We must be religious and community institutions which serve a multitude of memberships and offer a variety of worship opportunities, programs and activities. The "centers of the synagogue" as defined by Dr. Tobin, are the target markets which are there for the taking. We must begin to create membership strategies that are aimed at retaining our existing members and reaching the non-affiliated. We must eliminate the complacency which has caused our synagogues to lose their place as the center of Jewish life. When we make the decision to reengineer our synagogues, we will guarantee a strong Jewish community well into the 21st century.
1. "Being a Part-time Jew Isn't What God Had in Mind", Gary S. Cohn, Jewish Bulletin of Northern California, August 26, 1994

2. Ibid.


4. Ibid, pp. 165-166

5. Ibid, pp. 313-314

6. Ibid, pp. 323-324
