Leadership Development and Succession Planning – challenges and opportunities for synagogues today

Presentation to the Synagogue Council of Massachusetts
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The New Normal Project
Storyboarding:

TOPIC QUESTION: What would make synagogue leadership desirable?

- Aim of storyboarding is to do a thorough brainstorm – but then also help come up with a framework where ideas can be implemented
- Originated with Disney
- Usually multi-part, though we will just focus on the brainstorming today
- Come up with your top answers
- Will go around the zoom for everyone to share
- If something has already been said...share your next answer
- Can also put it in the chat
- No criticizing or evaluating just yet
- Throw out any idea, no matter how seemingly crazy or outlandish
- We will discuss a bit on the zoom – and will share the brainstorming and framework that emerges after
KEY TAKEAWAYS
To best navigate uncertainty and make smart strategic decisions, leaders need to identify the relevant trends and issues at play. This means asking the right questions as to how various drivers of change can impact an organization's operations, service delivery, and ability to deliver on its mission – while at the same time resisting both the pull of business as usual and the allure of fads and quick fixes.

→ How is change affecting you and your organization?

→ Are you prepared to face change head on? (Or will you kick the can down the road...?)

→ What do you need to do to grapple with change effectively?
The Usual Approach
The New Normal: UNCERTAINTY

→ But, with crisis comes opportunity. How are you and your organization taking advantage of this moment?
Key issues to address:

- Synagogues need a leadership pipeline and succession pathways
- Synagogues need meaningful roles for volunteers
- Synagogues need younger volunteers

→ This workshop will explore the key challenges synagogue leaders face in providing effective solutions to these issues.

Two questions we will keep in mind throughout:

- What’s the value proposition for the volunteers?
- Is the lack of leadership succession a root problem? Or a symptom of larger/other issues?

The outcomes of this session will consist of:

- some practical steps that can be taken to address the issues identified,
- suggestions as to longer term strategies and directions that could have an impact...
- and likely raise some broader issues that synagogue leaders need to grapple with.
Highlights of Survey Results and Synagogue Circumstances

Background questions:
• How many years have you served on the board of your synagogue?
• How many years have you served as president?
• How many people serve on your synagogue's board?
• What percentage of your board usually attends your board meetings?

Overall responses:
• Broad range of board tenures
• Most presidents...less than 4 years – but a few outliers at 10 years or more
• Good range of board sizes
• Most say 80% of more of board attend meetings (REALLY?? 😊)
• Many boards have younger folks on the board – some youth and some in 20s, 30s
• HOWEVER there’s an interesting indicator...those without younger people are more likely to be less optimistic/pessimistic about the future
Highlights of Survey Results and Synagogue Circumstances

Most pressing challenges as a synagogue leader:

• Key challenge...Succession and being able to pass on leadership role to someone else
• Also:
  • Getting people to step up and take on congregational responsibilities
  • Dealing with challenging personalities

Most pressing problems your synagogue or congregation faces:

• Key problem...Finding good, appropriate lay leadership
• Also:
  • Attracting new families/members
  • Strategic planning for our future (though few explicitly indicated sustainability issues)
KEY ISSUES:

• More than half of leaders responding to survey don’t know who your next board president will be
• Good news...many have full time administrators and rabbis
• HOWEVER, a key issue is...Who makes operational decisions?

→ Answers are all over the map

• Revealing a real confusion about roles...which can contribute to the challenges many synagogues face
• Better alignment of answers on the strategic decisions front...core synagogue leaders and Rabbi taking the lead
• Good that many are optimistic that the future will be successful and stronger, though a significant minority that have concerns

→ Importance of being thoughtful and intentional about the future and dealing with change
TAKEAWAY: Need to get ahead of the curve
"So what you’re saying is that we’ve been defunct and out of business for over two years and you’ve just been waiting for the right time to tell me?"
Synagogue Leadership And Succession Planning

• Importance of Direction, Alignment, and Commitment in effective leadership
• What Is DAC? The DAC Framework for Leadership, Explained
• Whether within a team, workgroup, task force, division, department, community, or an entire organization — for leadership to happen, the interactions and exchanges among people have to create:

  • **Direction**: Agreement on what the collective is trying to achieve together.

  • **Alignment**: Effective coordination and integration of the different aspects of the work so that it fits together in service of the shared direction.

  • **Commitment**: People who are making the success of the collective (not just their individual success) a personal priority.

  → *Where does your congregation or board fall within this framework?*

https://www.ccl.org/articles/leading-effectively-articles/make-leadership-happen-with-dac-framework/
Identifying and Cultivating Leadership

• Developing a leadership pipeline, along with effective communication, prospect identification, and stewardship
• Who would be good? Think attitude, commitment, skills → DAC
• Not just anyBODY will do!!!
• Think: PROPENSITY, AFFINITY, CAPACITY
• Ultimate goal: Succession planning and knowing who your next 2 presidents are or could be...now

• Make a list – who do you think would be good
  o Think about diversity in age, gender, background

• What is the checklist of skills and/or roles/functions
  → Do you have a job description???

• What are good projects or programs where prospective leaders can get a taste of responsibility – and you can get a taste of them?

• What’s the vision?
  o Need a positive message
  o Have you defined purpose clearly?
  o Where’s the win for the prospect???

• Think pipeline and growth
"We need to strike the right tone between asking and desperately pleading in our alumni solicitation letters."
Role Definition and Clarifying Expectations

- Importance of role definition for leaders!!!
  - Focusing on the right issues
  - Staying in the right lane
  - As well as ensuring manageable/fun/meaningful roles for volunteers (go back to operational question on survey...)

→ Are you telling a story that someone else would want to be a part of? (Not everyone likes to be a martyr)

→ Or, alternatively, are you selling tickets to a rollercoaster? (Not everyone likes rollercoasters...and those who do may not be your best leadership prospects)

- Importance of focusing on appropriate strategic and substantive roles, issues, projects

- What are your “starter” roles?

- How to engage in effective problem solving, including getting ahead of the curve when it comes to emerging issues and charting strategic directions/possible alternatives

- Importance of leaders focusing at the right level – on more strategic issues and engaging in future planning
Keep your focus!
Alas...Most Meetings

Communication

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Why would someone want to take on this role?

- Values
- Good fit for them – skills, time/convenience
- Social – fun, way to meet people, engaging
- Offering growth opportunities
  - Leadership/Jewish training
  - Professional/volunteer development
  - Networking
- Effective board meetings
  - Good mix of reporting and discussion
  - Not too long
  - Consent agendas
  - Effective communication
- Use committees
  → Running effective meetings and organizations in the age of zoom
- Hakarat Hatov – focusing on wins, emphasizing constructive/positive approaches, saying thank you
People are prioritizing the basics...where does what YOU do fall?

MASLOW'S HIERARCHY OF NEEDS

**PHYSIOLOGICAL**
Breathing, food, water, sex, sleep, homeostasis, excretion

**SAFETY**
Security of body, of employment, of resources, of morality, of the family, of health, of property

**LOVE/BELONGING**
Friendship, family, sexual intimacy

**ESTEEM**
Self-esteem, confidence, achievement, respect of others, respect by others

**SELF-ACTUALIZATION**
Morality, creativity, spontaneity, problem solving, lack of prejudice, acceptance of facts

Abraham Harold Maslow
(April 1, 1908 - June 8, 1970)
was a psychologist who studied positive human qualities and the lives of exemplary people. In 1954, Maslow created the Hierarchy of Human Needs and expressed his theories in his book, Motivation and Personality.

Self-Actualization - A person’s motivation to reach his or her full potential. As shown in Maslow’s Hierarchy of Needs, a person’s basic needs must be met before self-actualization can be achieved.

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It’s not rocket science...but change is hard!
Danger doesn’t just come from “the Covid” → many of these trends playing out regardless
DISCUSSION QUESTIONS:

Which of the issues covered makes sense? What requires more fleshing out?

What other issues do you have that weren’t addressed?

What do you most need help with right now?

Do you have help or a good sounding board?

Other questions/ideas/challenges?
Further Resources

Links and Useful Resources:

• Jewish Community Legacy Project: https://jclproject.org/Congregation-Continuity
• A very good nonprofit resource: Home - Blue Avocado
• Great resource for Board best practices: BoardSource - Empowering Boards & Inspiring Leadership
• A great resource for online metrics: M+R Benchmarks 2021
• Good stuff from CJP: https://www.cjp.org/resources-for-partner-organizations
• OU Synagogue Consulting: https://ouservices.org/resources/
• USCJ Resources: https://uscj.org/leadership
• URJ Resources: https://urj.org/what-we-do/congregational-life

Other Directions to Consider:

• Assess your congregation – have you thought about a survey or focus groups? Or a look at your whole business model?
• Strategic planning
• Focused training or visioning sessions for your leadership
We wish you the best of luck!

If we can be helpful in your fundraising or strategy planning, let us know!

The “New Normal Project” brings together several consultants and experts who specialize in strategy, change management, and operations in the non-profit space. We have been engaging in interviews, roundtables, surveys, and other research on trends, drivers of change, and implications for nonprofits and philanthropy (especially in the Jewish community).

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