

The URJ Rabbinic Transition Roadmap

Module 2: The Planning and Discovery Stage



Cover photo courtesy of Matthew Healey, Temple Israel of Boston, Boston, MA.

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Welcome to the Journey of Rabbinic Transition

The journey of rabbinic transition begins before the search for a new, settled rabbi. It begins the moment when a congregation learns that their current rabbi will be departing. It is a journey that challenges everyone involved to be mindful and respectful of the broad range of individual emotions and feelings generated by the departure of one settled rabbi and the welcoming of a new settled rabbi.

The URJ has developed this four-module Rabbinic Transition Roadmap to help congregational leadership guide their congregations on this journey. It is highly recommended that you begin with Module 1—“Understanding Transition”—no matter where you are on the path. It sets the stage and builds a foundation for the successful management of the transition process. After that, each module can be used independently and can even overlap based on the congregation’s transition timetable.

Realizing that in today’s world “the only constant is change,” perhaps the most enduring value of this resource is that once you have learned and applied the key principles of transition management to your rabbinic process, you will be able to apply them to many other change processes that you undertake as a community, from that of other staff or leadership to anticipated programmatic changes. As experimentation and change processes become more crucial to the success of congregations in the 21st century, we hope that the value of this resource will expand to meet your needs well beyond this immediate journey of rabbinic transition.

May Adonai bless you and your congregation on this journey, and on your journeys yet to come.

The URJ Rabbinic Transition Roadmap

Module 2: Planning and Discovery

The *URJ Rabbinic Transition Roadmap* is a self-guided resource for congregations who are in the process of planning for the departure of their current rabbi and the welcome of their new rabbi.

This resource is divided into four modules. Module 1 focuses on understanding transition and is an important starting point no matter where the congregation is in the transition process. Modules 2–4 cover the three chronological, or task-oriented, stages of transition. It is highly recommended that you begin with Module 1 no matter where you are in your transition. It sets the stage and builds a foundation for a successful transition. After that, each module can be used independently and can even overlap based on the congregation's transition timetable.

Learning that your rabbi is going to be leaving the congregation can be an unsettling experience, and this “in-between” time can raise feelings of anxiety and uncertainty. A thoughtful approach to transition management can help shift your perspective from one of fear to one of opportunity. The months or years preceding your rabbi's departure can be a time for the congregation to dig deep to uncover the “submerged beliefs”¹ that direct much of a congregation's attention and activity. In addition, this “in-between” period, when the change of rabbis is known but isn't yet imminent, is an excellent opportunity to spend time reflecting on who the congregation is now and who it is becoming. Doing this work now is not only an important step to prepare for the search for your next settled rabbi, but it also can nourish a healthy climate of discovery and questioning that has positive benefits for the long term.

When framed as an opportunity to pause, refresh, and renew as a congregation, the planning and discovery phase of the transition provides the time and space to engage members of the community, including congregants, lay leadership, and staff and clergy. Separate from the celebrations that will serve as a farewell to your rabbi, plan a few celebratory events during the twelve to twenty-four months before the rabbinic changeover. These could be endowment campaign kickoffs, milestone celebrations for key individuals or the congregation, or simply opportunities to come together in celebration of recent achievements.

Characteristics of the Planning and Discovery Stage

While the search for your next settled rabbi may hew to a scheduled timeline that can be planned in advance and is in sync with the CCAR placement schedule, the transition process is lengthier and has less concrete start and end dates; it begins whenever it is that the congregation's leadership learns that the rabbi will be departing, whether that departure is planned and announced one to three years in advance or comes more suddenly in response to an unexpected event, and continues well into the first year of the next settled rabbi's tenure. Whatever the circumstance of the current rabbi's departure, learning that there will be a change in rabbinic leadership is often an unsettling experience for congregants and staff alike. Because of this, it can be tempting to move quickly and jump ahead to concrete tasks related to the search for a replacement. Experts in transition management, however, teach us that it's important to slow down and use this time to reflect on the past, dig deeper into present realities, and imagine the future; when congregations do this well, these “in-between times can become sacred space.”²

¹ The concept of “submerged beliefs” comes from Beverly A. Thompson and George B. Thompson, Jr., *Grace for the Journey: Practices and Possibilities for In-Between Times* (Lanham, MD: Rowman & Littlefield, 2011).

² Thompson and Thompson, *Grace for the Journey*, p. 10.

Transitional time, used well, will further a climate of discovery and questioning, enable wise and timely decision-making, examine diverse perspectives, and strengthen the congregation. It is a time that is ripe for movement toward greater health or to dysfunction and potentially opens up the congregation to a new destiny. This will require thoughtful work over time, avoiding quick fixes or reactions. While it may be tempting to drive quickly past the stages and opportunities of this transitional time to name the next settled rabbi, a well-planned and intentional congregational process avoids mishaps along the way. Traveling through each of the phases of transition will secure a healthier rabbinic match for your congregation and lay the groundwork for the next settled rabbi and the congregation to thrive.

While you as a congregational leader may be ready to dive into planning mode, you should anticipate that different individuals will be at different stages in the process. There are opportunities outlined in *Module 3: Saying Goodbye* to engage specifically with the mixed feelings people often have as the reality of the rabbi's upcoming departure sinks in.

Be sure to use Module 1 and some of its exercises to learn about the transition process itself so that you will better understand what is happening in your congregation during this period.

Note: As you begin the journey toward welcoming your next settled rabbinic leadership, consider that your outgoing rabbi is also on a journey, both personal and professional. The transition will impact the rabbi, the rabbi's family members, the other clergy and staff, the lay leadership, and the general membership. Some of these changes may be daunting and complex, and a lot is at stake. Emotions may be mixed and may include (at different times and for different individuals) excitement, sadness, stress, joy, anxiety, relief, and more. Acknowledging these emotions and naming them will be important throughout the transition.

In short, strong transition management during the planning and discovery stage means shifting from a reactive mode to a discovery mode. As a leader in your congregation, your role is to help change the conversation from "What do we do now?" to "Who are we now, and who do we want to be?" As you do so, you have the resources of the URJ to assist you, and a network of peer congregations with whom to share ideas and ask questions. The brochure [*Engage with the URJ to Strengthen Your Congregation*](#) provides an excellent overview of ongoing opportunities and resources for your congregational leadership.

The Five Steps of Planning and Discovery

The planning and discovery phase is one that takes your congregation on a journey of self-discovery, exploring the broader Jewish and Reform Jewish world, imagining the future, and determining strategic directions and priorities for the future.



The first step, *Learning about transition*, is really a foundational task, designed to set the stage for the rest of the transition process. This step is undertaken mostly by a small group of transition leaders and other senior lay and professional leaders. Module 1 provides many materials to use for this step.

The next three steps, *Who are we?*, *Where do we fit in?*, and *Who are we becoming?*, are about congregational self-discovery, understanding the broader context in which every congregation operates, and visioning for the future. As a group, these three steps involve the greatest number of congregants and specific stakeholder groups.

Finally, *How will we get there?* is about setting and affirming priorities and strategic directions. Like the first step, this one is generally going to be tasked to a specific group of congregational leaders.

Throughout, focusing on opportunities for **learning** and **engagement** will help the congregation gain the most benefit from the planning and discovery phase of transition. While each congregation’s journey will be different, a breakdown of the tasks commonly completed during each stage is in the table below. Resources for each stage are included at the end of this module.

Planning and Discovery, Step by Step

Planning and Discovery Steps 1–5	Tasks for Transition Leadership
1. Learning about transition (Module 1)	<ul style="list-style-type: none"> • Learn about transition. • Identify your congregation's transition leaders. • Educate other stakeholders about transition, building outward from the leadership core.
2. Who are we?	<ul style="list-style-type: none"> • Revisit any existing strategic plans, mission statements, and vision statements. • Plan opportunities to listen to stakeholders across the congregation, serving the dual purpose of collecting data and engaging individuals.
3. Where do we fit in?	<ul style="list-style-type: none"> • Contextualize any data you've collected by comparing it to other congregations of similar size and demographics. • Learn more about trends and activities in other URJ congregations.
4. Who are we becoming?	<ul style="list-style-type: none"> • Design opportunities to imagine the congregation's future. • Challenge assumptions that may limit possibilities for growth and renewal.
5. How will we get there?	<ul style="list-style-type: none"> • With board and other lay or professional leadership, affirm strategic directions for the future. • Work in tandem with search team to ensure they have the information they need for their work.

Jewish Texts on Planning and Discovery

These texts can be used to lead a discussion about transition and what some of the feelings and challenges can be when trying to navigate an important transition.

Instructions:

- Distribute the handouts on pages 11 and 12.
- Read through the texts and answer the questions together or in small groups.

For your convenience, we are listing the questions here as well, together with sample answers in brackets to some of the questions that can help you guide the conversation:

Text 1—Genesis 12:1

“To the land that I will show you...” [Genesis 12:1].

It is generally true that a person who moves from one place to another is asked: “Where is your new home? Why did you leave your old place, and what is your destination?” Generally, a person is able to answer these questions. But this was not true with Abraham, who was commanded by God, “Go for yourself from your county,” but was not told where he was to go to. When the people of his city saw that Abraham was leaving, they asked him: “Why? What is your destination?” All he could do was stammer that he did not know why he was leaving and where he was bound. The people who heard this all wondered: “Can a person travel to a place without knowing where or why?” And again Abraham was forced to repeat himself and tell them that God had ordered him to do so, and that he believed with perfect faith that he would find rest in his new place. (R’ S.A.Y. Taub of Modzhitz)³

1. According to this interpretation, what made Abraham’s journey particularly difficult? [He didn’t know where he was going or why.]
2. Does the rabbinic transition feel a bit like Abraham’s journey? If so how? If not, how?
3. What did Abraham need to do in order to survive all of the questions he couldn’t answer? What kind of advice can we take from Abraham’s example? [Have faith things will go well; be positive.]
4. There are questions that we, like Abraham, cannot answer right now (e.g., “Who will our new rabbi be?”), but what questions do we need to try to answer? [Who do we want to be as a congregation? What qualities in our next settled rabbi are important to us?]

Text 2—Exodus 2:11

“And he [Moses] looked on their burdens...” [Exodus 2:11]. What is the meaning of “And he looked...”? Rabbi Elazar, son of Rabbi Yosei the Galilean, said: He saw great burdens put upon small people and light burdens put upon big people, and a man’s burden upon a woman and a woman’s burden upon a man, and the burden which an old man could carry on a youth, and of a youth on an old man. So he left his suite and rearranged their burdens, pretending all the time to be helping Pharaoh. (*Shmot Rabbah* 1:27)⁴

1. What does Moses do that is so important? [Recognize that different people have different needs/abilities. Give each person appropriate work to do.]
2. Why is this so important to do? Why is it not just compassionate, but good leadership?
3. Within the congregation’s leadership (board, search team, transition team, etc.) how can you make sure that the appropriate people have the right tasks? How can you be sure that different people’s needs are heard and respected? What do you need to do to ensure that the job description for your new rabbi reflects different people’s voices and needs?

³ Aharon Yaakov Greenberg, *Torah Gems*, trans. Shmuel Himelstein, vol. 1 (Tel Aviv: Yavneh Publishing House; Brooklyn: Chemed Books, 1992), p. 102.

⁴ Adapted from *The Midrash Rabbah*, vol. 2 (London: Soncino Press, 1977), pp. 34–35.

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Questions for Discussion:

1. According to this interpretation what made Abraham’s journey particularly difficult?
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Exercises and Resources for Step 2: Who Are We?

What Are the Main Activities in This Step?

- Revisit any existing strategic plans, mission statements, and vision statements.
- Plan opportunities, such as facilitated focus groups, well-designed surveys, and other facilitated listening sessions, to listen to stakeholders across the congregation, serving the dual purpose of collecting data and engaging individuals. As the congregation looks inward, together you can reflect on what's been going well in addition to exploring areas for growth.

The exercises for Step 2 will be useful as you launch your discovery process. Activities like these not only provide useful data for planning purposes, they can also serve as engagement opportunities in and of themselves, as the process of engaging in meaningful conversation about the future of the congregation naturally builds excitement and increases feelings of inclusion and commitment.

The following URJ resources, available online, will supplement your own learning and can easily be shared with other transition leaders:

- *Principles That Drive Strong Congregations*, volume 1 of *Moving to the Leading Edge: A URJ Resource and Discussion Guide to Move Your Congregation Forward* (New York: Union for Reform Judaism, 2016).
- *Leadership and Governance*, volume 2 of *Moving to the Leading Edge: A URJ Resource and Discussion Guide to Move Your Congregation Forward* (New York: Union for Reform Judaism, 2016).

How we shape, facilitate, and nurture conversations impacts what comes out of them. [Appreciative Inquiry](#), an approach to change that involves searching for and focusing on what works in an organization, rather than the organization's deficits, can be used to facilitate productive, engaging, and inspiring discussion about your congregation's future.

The following URJ projects and initiatives can support the work you are doing during Step 2 of the planning and discovery phase. Some projects are more general (such as board workshops), and others are specific to particular areas your congregation may be focused on. You can learn more about each online, using the embedded links, and by contacting URJ staff as indicated on each initiative's web page.

- [URJ board workshops](#) can assist you with reviewing and renewing mission and vision statements.
- [URJ Congregational Benchmarking and Assessment Project](#) has tools that help you collect data on a variety of congregational measures.
- [URJ Audacious Hospitality Pilot Toolkit](#) focuses on creating inclusive communities grounded in meaning, understanding, and connection.
- [Disabilities Inclusion Learning Center](#) (in partnership with the Ruderman Family Foundation) offers resources for including people with disabilities and their families into your congregation.
- URJ Youth Engagement Assessment Tool and Snapshot ([contact URJ Youth](#) for more details) provides data that helps congregations understand how engaged their youth are currently, with the goal of improving engagement.

Have more questions? Connect with these resources:

- [URJ Consulting and Transition Management Team](#)
- [URJ Knowledge Network Team](#)
- [The Senior/Solo Rabbinic Transition group](#) in The Tent, where you can ask your own questions and get advice from other congregational leaders

Exercise 1: World Café

Overview: This exercise uses a model of dialogue and small-group conversation called [World Café](#) to learn about the congregation and to question assumptions. World Café is a versatile model that can be adapted for many contexts. The following exercise was created specifically for *Step 2: Who Are We?* and *Step 4: Who Are We Becoming?*

Goals: During this session, participants will

- Share their experiences with and reflections on the congregation and/or its place in the Jewish community
- Identify common themes that arose in the conversations
- Listen to each other
- Meet new people

Materials Needed

- Microphone
- Large sheets of paper and markers for each table
- Colorful tablecloths and centerpieces on each table
- Flip chart or whiteboard for the front of the room for note-taking

Timeline: Minimum 75 minutes

00:00–00:05 Welcome

00:05–00:15 Connection

00:15–00:30 World Café Round 1

00:30–00:45 World Café Round 2

00:45–01:00 World Café Round 3

01:00–01:15 Reflection

Preparation for the Facilitator(s)

This session requires quite a bit of preparation, so please read through these instructions carefully.

1. Familiarize yourself with the World Café process at theworldcafe.com.
2. Table hosts: Identify ahead of time a number of people who are able to serve as table hosts for the evening. The role of the table host is to welcome participants as they arrive, sit at tables to help encourage conversation, summarize what had been discussed previously when new people sit down at a table, and make connections to ideas from previous discussions. Hosts could be members of the transition team or other leadership or congregants who have taken a particular interest in transition work and are able to assume a small leadership role. Ask the table hosts to arrive 15–20 minutes early so that the facilitator can orient them to their roles and so that they are prepared to welcome participants as they arrive.
3. Room setup: Use a space in which you can create a café-like setting, perhaps with bistro or smaller tables that seat four to five people each. Decorate with colorful tablecloths and small centerpieces. Consider how your environment contributes to creating a welcoming atmosphere.

- On each table, place two large sheets of paper (flip charts) along with a handful of colorful markers. This is to allow people to jot down ideas as they come up.
 - Set up a table near the entrance with pens and name tags so that participants can create a name tag as they arrive.
 - Set up the audio equipment so it is ready to go at the beginning of the session.
4. In visible spots around the room, post these guidelines for **World Café Etiquette**:
 - Focus on what matters.
 - Contribute your thinking.
 - Speak your mind and your heart.
 - Listen to understand.
 - Link and connect ideas.
 - Listen together for insights and deeper questions.
 - Doodling is encouraged!
 5. Preselect three questions that will be addressed in each of the rounds of the World Café. Sample questions are included on page 16.
 6. Identify someone who will be a timekeeper for the evening, so that rounds can begin and end on time.

Facilitation

1. Welcome

- Welcome the participants to the gathering and thank them for coming.
- Explain that this session is one of several discussions that the congregation is having as the community addresses the upcoming rabbinic transition. We are now in our discovery phase of this transition, which means that we are trying to learn more about ourselves as a congregation.
- Welcome everyone to the World Café. World Café is a place where ideas, insights, hopes, and possibilities are on the menu. Tonight, in this café, we will have conversations around questions that assist with our rabbinic transition. We invite you to “belly up” to the table with humor, insights, creativity, and deep discussion about our congregation and its future. We welcome doodling, drawing, notes, and making connections.
- Turn the participants’ attention to the World Café etiquette guidelines, which are posted on the walls where everyone can see them. Review the guidelines and ask whether there are any questions about them.
- Explain the timeline for the evening: We will run three rounds of conversation, each approximately 15 minutes. In each round, we will focus on one question. Each table has a table host sitting with you. Invite the table hosts to raise their hands. When it is time to transition, the table hosts will remain at the table, and the participants will randomly select a different table at which to sit.

2. Connection

- To get us warmed up and used to talking with each other, let’s take a moment just to get to know the people at your table. Invite the participants to select one of the markers on the table and take a moment to either draw a doodle or write a word that represents how each of them would describe the congregation.
- Invite people to share what they wrote/drew with the people at their table.
- Instruct each table to select a recorder for the first round. The recorder will capture themes and key points on the paper provided at each table.

3. Activities

- World Café Round 1: Facilitator reads aloud the first discussion question.
- At the end of the round, each host stays and captures any final themes. Everyone else randomly selects a new table.
- World Café Round 2: Facilitator reads aloud the second discussion question.
- At the end of the round, each host stays and captures any final themes. Everyone else randomly selects a new table.
- World Café Round 3: Facilitator reads aloud the third discussion question.
- At the end of the round, the hosts capture the final themes. Everyone remains where currently seated.

4. Reflection

- Focusing the participants' attention back toward the whole group, invite participants to reflect on a theme that emerged for them in the conversations, an insight they may have had, or connections built across conversations.
- The facilitator can take notes on these comments on a flip chart at the front of the room.
- As a final exercise, go around the room and invite people to share one word that expresses how they are feeling about the conversation and the future of the congregation.

5. Next Steps

- Collect the notes and recorded reflections. Save this feedback for future reference.
- Thank everyone for coming. Let them know whom to contact if they have additional thoughts or questions.
- If appropriate, inform participants about the date and time of the next gathering.

World Café Discussion Questions for Step 2: Who Are We?

In advance of the session, select three questions from this list for your participants to focus on.

Each question you choose will be the topic of one of the three rounds of World Café discussion.

- How do you feel when you think about our congregation?
- What are some of the words that you use to describe our congregation?
- What is the most valuable aspect of being a member of this congregation?
- What are our strengths? How do we want to grow and develop?
- Where is there time and attention in our synagogue for thinking about what matters most to our members? Do you feel like you matter to our congregation? When and how do you feel that we connect to you?
- Share a story about when you were seen, heard, or had your dreams affirmed or when you contributed to this congregation.
- In what ways could this congregation be so compelling that it would be the center of your Jewish life?
- What appeals to you about this spiritual community? How might it be improved?
- What are the most important stories of our congregation? What beliefs and values underlie those stories? Are they stories of abundance or scarcity? How have those values and beliefs informed the congregation?
- What are the core values that will direct our daily decisions and actions as we navigate toward our future? What do we aspire to become as a congregation (beyond self-perpetuation), and why should anyone care?
- What is working well? What is still unresolved from the past? What do we now celebrate? What have we learned along the way? What is uniquely ours? How do we see our future together?
- How does our congregation measure success? What could/should those measures be?
- What are the opportunities and challenges we face now?

Exercise 2: Focus Group Options

Conversation groups are the best means of collecting data when a congregation is engaging in visioning work because

- You can get better data because of the opportunity for clarifying and follow-up questions
- They create involvement with and buy-in to the new vision
- Participants better appreciate that there are multiple visions and that their own vision is just one piece of a larger and more complicated whole
- They build community

Some congregations may seek to create focus groups from a representative sample of the overall congregational membership. Others will invite all members to participate in conversation groups.

At a time of rabbinic search, visioning is critical to selecting the best possible rabbinic match for the congregation. You need to know where you want to go before you can choose the person best suited to help you get there!

Choosing Groups When Doing Sample Focus Groups

The key to success is picking the right people. You want to hear from people who are thoughtful, who don't talk for the sake of talking, and who care about the synagogue.

Decide which sub-populations are important to reach. For example:

- New members (1–3 years)
- Long-time members (15+ years)
- Marginal members (show up only for High Holy Days)
- Active members, Shabbat service regulars
- Interfaith families
- Parents of preschool or nursery school children
- Parents of religious school students, parents of teens
- Empty nesters, seniors
- Men, women
- Generous donors or those with potential to be generous

Of course, congregations opening conversation groups to all members do not need to take the step of choosing people for the groups.

Setting Up Conversation Groups

One effective method for gathering participants is with a personal phone invitation, followed up by a letter. Three weeks' notice is usually a good amount to ensure good attendance.

Groups may be up to ten to twenty people, twelve to fifteen is ideal. Often groups are sub-population homogeneous, but not always. This is a decision to make based on your congregation's culture and the goal of the focus groups.

Conducting Groups

Groups may run from 45 to 90 minutes, depending on the number of questions that need to be discussed. Each question usually takes about 15 to 20 minutes to discuss.

Establish a friendly and relaxed atmosphere by serving food and starting with introductions.

The facilitator should

- Introduce him- or herself and explain why he or she is there
- Explain the process
- Pose the questions and listen actively to the responses
 - If the answers are unclear, restate to check if the intended meaning was understood
 - Scribe responses if the group will be asked to prioritize between them

You will need at least one person assigned to each session to take careful notes. It can be a real time-saver if notes are taken on laptop computers.

Choosing Questions

In general, open-ended questions are the best. Questions should include both broad visioning questions and questions directly related to the search. If you have groups representing sub-populations, you may choose to ask some core questions of all groups and some specific questions relevant to sub-population groups. Following are some samples of questions asked in actual groups.

Temple 1: All Questions the Same (60 Minutes)

- What is the single most important thing a rabbi needs to know about this congregation? How do we see ourselves? Where do you see our congregation going? What attributes does our congregation have?
- What do you see as the three most important issues facing the congregation in the next five years?
- Given our vision of ourselves and our issues, what qualities (that is, personality traits) in a rabbi are the most important in order for our congregation to become the best synagogue that we can become?
- Given our vision of our congregation and our issues, which rabbinic skills and experiences should the next settled rabbi possess? How would we prioritize them?

Sample Skills/Experience:

- Pastoral skills—life-cycle events, forming close relationships with congregants, counseling
- Ritual expertise—liturgical knowledge, sermon writing, preaching
- Expertise in external relations, activities in the community
- Expertise and experience in preschool and religious school education, formal (classroom) education, working with children
- Expertise and experience with teens, youth groups, NFTY (informal education)
- Scholarly skills, adult Jewish growth
- Social action experience and expertise
- Experience and expertise in dealing with interfaith families educationally, programmatically, and pastorally
- Administrative skills—fundraising, staff supervision, board-staff relations

Temple 2: Core Questions and a Few Specialized Questions (90 Minutes)

Conversation 1: Current Strengths and Weaknesses (20 minutes)

1. What are the temple community's current strengths? (10 minutes)
 - What is the single most important positive thing a rabbi needs to know about this congregation?
 - What about the temple has given you the greatest fulfillment?
2. What are the temple community's current weaknesses? What has most frustrated you about the temple? (10 minutes)

Conversation 2: Vision for the Future (25 minutes)

3. How could the temple be improved to meet your needs? (10 minutes)
4. What dreams do you have for the congregation? What could we become? (15 minutes)

Conversation 3: What We Seek in a Rabbi (40 minutes)

5. Some major **roles** of a rabbi may be spiritual leader, educator, administrator, provider of pastoral care, and/or social action activist. Which role(s) is/are most important for the rabbi to play? (10 minutes)
 - For parents of school-age children: What do you feel the rabbi's role should be in the preschool and religious school programs?
 - For temple leaders and temple benefactor group: What do you feel the rabbi's role should be in fundraising?
6. What do you want in your **relationship** with your rabbi? (15 minutes)
 - What do you want the rabbi to do to inspire you and make you feel more connected to Judaism and Jewish rituals and to the temple community?
 - How do you expect the rabbi to relate to new members and their children?
7. What personal **qualities** are most important to you in our rabbi? (15 minutes)
 - Where do you want our rabbi to be in the spectrum of Reform Jewish practice?
 - What qualities and beliefs should our next settled rabbi possess with regard to interfaith relationships?

Some Other Good Visioning Questions:

- What do you value most about our temple (or what is unique about our temple) that you want to be sure to keep during our rabbinic transition?
- If you could dream, what would our temple look like in five years?
- What is Reform about our temple? To what degree are the values of Reform Judaism important to our identity as a congregation? What relationship do we want to have with the Reform Movement?
- If with the stroke of a pen you could change one thing about the congregation, what would you change?

Exercises and Resources for Step 3: Where Do We Fit In?

What Are the Main Activities in This Step?

- Contextualize any data you have collected by comparing it with that of other congregations of similar size and demographics.
- Learn more about trends and activities in other URJ congregations, as well as the broader Jewish world.

One of the benefits of your URJ membership is that you have a ready made platform for learning more about—and connecting with—other congregations, as well as trends and activities in the broader Jewish world. After spending time looking inward, you can contextualize what you’ve learned by benchmarking your congregation alongside other congregations of your size and demographics. Or, you can look out to the broader landscape by visiting other congregations (physically or virtually in The Tent) and by reading contemporary publications such as the URJ’s *Inside Leadership* blog.

The following URJ resources and initiatives will supplement your own learning and will support the work you are doing during this step of planning and discovery.

- [URJ Congregational Benchmarking and Assessment Project](#), which has tools that help you compare and contextualize the data you have collected on a variety of congregational measures against other URJ congregations
- [URJ Inside Leadership blog](#)
- [The Tent](#), an online platform where you can connect with other URJ congregational leaders and URJ staff to ask questions, follow discussions, and find resources

These additional resources will help keep you up to date on contemporary trends and challenges in American Jewish life:

- [NATA Journal](#)
- [ARJE Achshav](#)
- [Tablet](#) magazine
- [eJewish Philanthropy](#)
- [CCAR Journal: The Reform Jewish Quarterly](#)

Have more questions? Connect with these resources:

- [URJ Consulting and Transition Management Team](#)
- [URJ Knowledge Network Team](#)
- [The Senior/Solo Rabbinic Transition group](#) in The Tent, where you can ask your own questions and get advice from other congregational leaders

Exercise 1: Synagogue Website Scan

Overview: Through an exploration of other synagogues' and institutions' websites, participants will learn about the varieties of offerings provided in their own and other Jewish communities, as well as throughout the Reform Movement. This exploration will help identify a set of future possibilities for the congregation.

Goals: During this session, participants will

- Learn about what is going on in other congregations throughout North America, as well as other Jewish institutions and in the broader Reform Movement
- Compare what they've learned from these other institutions to their congregation's current offerings and priorities
- Discuss possible future offerings or priorities for the congregation

Materials Needed

- Flip chart (or whiteboard) and markers
- LCD projector, screen, and necessary cables for connecting to laptop or tablet
- Prepared slides⁵
- Microphone
- Internet access
- A number of internet-accessible devices, such as tablets or laptops

Timeline: 90 minutes

00:00–00:05 Welcome

00:05–00:15 Connection

00:15–00:20 Instructions for Website Scan (see 3 below)

00:20–00:35 Activity Stage 1—Website Scan

00:35–00:50 Activity Stage 2—Lessons Learned

00:50–01:20 Reflection

01:20–01:30 Next Steps

⁵ Note: If necessary audiovisual equipment is not readily available, the information to be shared can be written ahead of time on flip charts and pulled out at the appropriate time in the session.

Preparation for the Facilitator(s)

1. Prepare a list of websites that the small groups could explore. The number of websites to be explored will be determined by the number of participants at the session. Put each of these web addresses on a slip of paper, and put the papers in a hat or bowl so that small groups can randomly select which website they will explore. Websites could include the following:
 - Preselected synagogues from around North America. Collect suggestions for synagogues from congregational leadership (rabbi, cantor, educator, executive director, board members). Be sure to include congregations from beyond your own local community or state.
 - Other local or well-regarded Jewish organizations: Jewish Federations, JCCs, Jewish start-ups.
 - Union for Reform Judaism organizations: [URJ](#) and [ReformJudaism.org](#), [Religious Action Center of Reform Judaism](#) (RAC), [Association of Reform Zionists of America](#) (ARZA) or [ARZA Canada](#), [Women of Reform Judaism](#) (WRJ), [Men of ReformJudaism](#) (MRJ).
2. Prepare the following slides:
 - Slide 1: Stage 1—Website Scan
 - What is the mission of the institution?
 - Whom does this institution serve?
 - What are the apparent priorities of the institution? How do you know this?
 - What surprises you about the work of this institution?
 - Slide 2: Stage 2—Lessons Learned
 - What issues or ideas do you see being addressed in this institution? How, if at all, does our congregation address these issues? How might these issues represent a need in the larger Jewish world? How might these issues or ideas affect our Jewish future?
 - Based on what you've seen, what can/should our congregation do differently to have an impact on our local community, both Jewish and otherwise?
 - Based on what you've seen, what can/should our congregation do differently to have an impact on the Jewish world?
3. Set up a table near the entrance with pens and name tags so that participants can create a name tag as they arrive.
4. Set up the audiovisual equipment and speakers so that they are ready to go at the beginning of the session.
5. Room setup: tables with chairs around them for small groups of people. Groups can have as few as three people and as many as eight. Each table should have at least one internet-accessible device, such as a tablet or laptop, a few sheets of flip-chart paper, and a few markers.

Facilitation

1. Welcome
 - As participants enter the room, invite them to sit at one of the tables. Try to spread people around to the various tables so that there are as many groups as possible.
 - Welcome the participants to the gathering and thank them for coming. Thank those who have brought their laptops and tablets.

- Explain that this session is one of several discussions that the congregation is having as the community addresses the upcoming rabbinic transition. They are now in the discovery phase of this transition, which means they are trying to learn more about themselves as a congregation and who they might want to become.
- Explain that the purpose of this gathering is to learn about the varieties of offerings provided in their own and other Jewish communities, as well as throughout the Reform Movement. They will do this by exploring those institutions' websites. This exploration will help identify a set of future possibilities for their own congregation.

2. Connection

Invite participants to introduce themselves to the other people sitting at their tables and share why they came to this session.

3. Activities: Website Scan, in two stages

- Give the groups instructions for doing their website searches.
 - Display the slides with the instructions for small-group work.
 - Groups will work in two stages. The first stage will entail learning about a particular organization or institution based on what is posted on its website. The second stage will entail pulling out some learnings or ideas from what participants found.
 - Appoint someone in each group to record and later report the essence of the group's conversation and findings.
 - Appoint a timekeeper who will help move the group through as many of the questions as possible in the time allotted.
 - Try not to get too stuck on one particular issue or item on the website. Balance your time between getting a broad overview of the institution and trying to identify some of its core priorities and how those are addressed.
- Instruct the groups to begin working on Stage 1—Website Scan. Post slide 1, with the Website Scan questions:

Stage 1—Website Scan:

 - What is the mission of the institution?
 - Whom does this institution serve?
 - What are the apparent priorities of the institution? How do you know this?
 - What surprises you about the work of this institution?
- Instruct the groups to begin working on Stage 2—Lessons Learned. Post slide 2, with the Lessons Learned questions:

Stage 2—Lessons Learned:

 - What issues or ideas do you see being addressed in this institution? How, if at all, does our congregation address these issues? How might these issues represent a need in the larger Jewish world? How might these issues or ideas affect our Jewish future?
 - Based on what you've seen, what can/should our congregation do differently to have an impact on our local community, both Jewish and otherwise?
 - Based on what you've seen, what can/should our congregation do differently to have an impact on the Jewish world?

4. Reflection

- Focusing the participants' attention back to the whole group, invite the reporters to share their group's findings:
- What institution did you learn about?
- What were their priorities?
- What can/should our congregation do differently?
- Invite the participants to reflect on any themes that emerged in the various group reports or an insight they may have had or to build connections across conversations.
- The facilitator can take notes on these comments on a flip chart at the front of the room.
- As a final exercise, go around the room and invite people to share one idea that they would like to see considered in the future work of the congregation.

5. Next Steps

- Collect the notes and recorded reflections. Save this feedback for future reference.
- Thank everyone for coming. Let them know whom to contact if they have additional thoughts or questions.
- If appropriate, inform participants about the date and time of the next gathering.

Exercises and Resources for Step 4: Who Are We Becoming?

What Are the Main Activities in This Step?

- Design opportunities to imagine the congregation's future.
- Challenge assumptions that may limit possibilities for growth and renewal.

This step bookends a period of broad engagement, listening, and dreaming that began with asking “Who are we?” and concludes with “Who are we becoming?”

Here, by inviting people to imagine the congregation's future, and by facilitating experiences that focus on possibility, growth, and renewal, you can accomplish two things:

- Build a sense of excitement and engagement that can counteract any feelings of stasis that the “in between” stage has brought up.
- Provide important language and vision that the search team can use throughout their process, including marketing the position and the congregation as well as during candidate interview and selection.

The following exercises, available in this module, will support you as you invite the congregation to dream together about the future:

- World Café (see instructions starting on page 26 and questions for Step 4 on page 28)
- Uncovering and Challenging Our Assumptions

This URJ resource will supplement your own learning and may be useful to share with other transition leaders:

- Allison Fine, “[Closing the Gap Between Good Intentions and Bad Results](#)” in *Moving to the Leading Edge: A URJ Resource and Discussion Guide to Move Your Congregation Forward, vol. 1, Principles That Drive Strong Congregations* (New York: Union for Reform Judaism, 2016), pp. 17–18.

We believe that how we shape, facilitate, and nurture conversations impacts what comes out of them. These resources will introduce you to approaches to planning and discovery that can be used to facilitate productive, engaging, and inspiring discussion about your congregation's future:

- [Appreciative Inquiry](#), an approach to change that involves searching for and focusing on what works in an organization, rather than its deficits. This approach may be useful in *Step 2: Who Are We?* and *Step 4: Who Are We Becoming?*
- [SOAR⁶](#), an approach to strategic planning that, like Appreciative Inquiry, focuses on maximizing strengths and engages many constituents. This approach to planning may be especially useful in *Step 4: Who Are We Becoming?* and *Step 5: How Will We Get There?*

Finally, this additional resource provides insight into real congregations who have transformed themselves into communities of meaning, connection, and purpose:

- Isa Aron, Steven M. Cohen, Lawrence A. Hoffman, and Ari Y. Kelman, *Sacred Strategies: Transforming Synagogues from Functional to Visionary* (Lanham, MD: Rowman & Littlefield, 2010).

Have more questions? Connect with these resources:

- [URJ Consulting and Transition Management Team](#)
- [URJ Knowledge Network Team](#)
- [The Senior/Solo Rabbinic Transition group](#) in The Tent, where you can ask your own questions and get advice from other congregational leaders

⁶ Jacqueline M. Stavros and Gina Hinrichs, *The Thin Book of SOAR: Building Strengths-Based Strategy* (Bend, OR: Thin Book, 2009).

Exercise 1: World Café

Overview: This session uses a model of dialogue and small-group conversation called World Café to learn about the congregation and to question assumptions. World Café is a versatile model that can be adapted for many contexts. We have created these materials specifically for *Step 2: Who Are We?* and *Step 4: Who Are We Becoming?*

Goals: During this session, participants will

- Share their experiences with, and reflections on the congregation, and/or its place in the Jewish community
- Identify common themes that arose in the conversations
- Listen to each other
- Meet new people

Materials Needed

- Microphone
- Large sheets of paper and markers for each table
- Colorful tablecloths and centerpieces on each table
- Flip chart or whiteboard for the front of the room for note-taking

Timeline: Minimum 90 minutes

00:00–00:10 Welcome

00:10–00:20 Connection

00:20–00:40 World Café Round 1

00:40–01:00 World Café Round 2

01:00–01:20 World Café Round 3

01:20–01:30 Reflection

Preparation for the Facilitator(s)

This session requires quite a bit of preparation, so please read through these instructions carefully.

1. Familiarize yourself with the World Café process at theworldcafe.com.
2. Table Hosts:

Identify ahead of time a number of people who are able to serve as table hosts for the evening. The role of the table host is to welcome participants as they arrive, sit at tables to help encourage conversation, summarize what had been discussed previously when new people sit down at a table, and make connections to ideas from previous discussions. The types of individuals you might select to serve as hosts could be members of the transition team or other leadership or congregants who have taken particular interest in this transition work and are able to assume a small leadership role. Ask the table hosts to arrive 15–20 minutes early so that the facilitator can orient them to their roles and so that they are prepared to welcome participants as they arrive.

3. Room Setup:

Use a space in which you can create a café-like setting, perhaps with bistro or smaller tables that seat four to five people each. Decorate with colorful tablecloths and small centerpieces. Consider how your environment contributes to creating a welcoming atmosphere.

- On each table, place two large sheets of paper (flip charts) along with a handful of colorful markers. This is to allow people to jot down ideas as they come up.
- Set up a table near the entrance with pens and name tags so that participants can create a name tag as they arrive.
- Set up the audio equipment and speakers so it is ready to go at the beginning of the session

4. In visible spots around the room, post these guidelines for **World Café Etiquette**:

- Focus on what matters.
- Contribute your thinking.
- Speak your mind and your heart.
- Listen to understand.
- Link and connect ideas.
- Listen together for insights and deeper questions.
- Doodling is encouraged!

5. Preselect three questions that will be addressed in each of the rounds of the World Café. Sample questions are included at the end of this exercise.

6. Identify someone who will be a timekeeper for the evening, so that rounds can begin and end on time.

Facilitation

1. Welcome

- Welcome the participants to the gathering and thank them for coming.
- Explain that this session is one of several discussions that the congregation is having as the community addresses the upcoming rabbinic transition. We are now in our discovery phase of this transition, which means that we are trying to learn more about ourselves as a congregation and who we might want to become.
- Welcome everyone to the World Café. World Café is a place where ideas, insights, hopes and possibilities are on the menu. Tonight, in this café, we will have conversations around questions that assist with our rabbinic transition. We invite you to “belly up” to the table with humor, insights, creativity, and deep discussion about our congregation and its future. We welcome doodling, drawing, notes, and making connections.
- Turn the participants’ attention to the World Café etiquette, which is posted on the walls where everyone can see it. Review the guidelines and ask whether there are any questions about them.
- Explain the timeline for the evening. We will run three rounds of conversation, each approximately 20–30 minutes. In each round, we will focus on one question. Each table has a table host sitting with you. Invite the table hosts to raise their hands. When it is time to transition, the table hosts will remain at the table, and the participants will randomly select a different table at which to sit.

2. Connection

- To get us warmed up and used to talking with each other, let's take a moment just to get to know the people at your table. Invite the participants to select one of the markers on the table and take a moment to either draw a doodle or write a word that represents how each of them would describe the congregation.
- Invite people to share what they wrote/drew with the people at their table.
- Instruct each table to select a recorder for the first round. The recorder will capture themes and key points on the paper provided at each table.

3. Activities

- World Café Round 1: Facilitator reads aloud the first discussion question.
- At the end of the round, each host stays and captures any final themes. Everyone else randomly selects a new table.
- World Café Round 2: Facilitator reads aloud the second discussion question.
- At the end of the round, each host stays and captures any final themes. Everyone else randomly selects a new table.
- World Café Round 3: Facilitator reads aloud the third discussion question.
- At the end of the round, the hosts capture the final themes. Everyone remains where currently seated.

4. Reflection

- Focusing the participants' attention back toward the whole group, invite participants to reflect on a theme that emerged for them in the conversations, an insight they may have had, or connections built across conversations.
- The facilitator can take notes on these comments on a flip chart at the front of the room.
- As a final exercise, go around the room and invite people to share one word that expresses how they are feeling about the conversation and the future of the congregation.

5. Next Steps

- Collect the notes and recorded reflections. Save this feedback for future reference.
- Thank everyone for coming. Let them know whom to contact if they have additional thoughts or questions.
- If appropriate, inform participants about the date and time of the next gathering.

World Café Discussion Questions for Step 4: Who Are We Becoming?

In advance of the session, select three questions from this list for your participants to focus on. Each question you choose will be the topic of one of the three rounds of World Café discussion.

- What is happening in the Jewish world, and how does that affect our future?
- What future possibility for Jewish life gives you energy?
- How could this congregation transform the Jewish and general community beyond our synagogue walls?
- What is exciting in the Reform Jewish world today?
- How can we connect more with the Reform Movement and the larger Jewish world?
- What is happening in the secular community and other faith communities around us, and how does that affect our future?
- What do we wish to be in the larger world?
- Why does this congregation exist, and what is the unique contribution we seek to make in this world? How will the larger world (however we define it) be better in the year 2025 if we have fully and successfully embodied our purpose and values as a congregation?

Exercise 2: Uncovering and Challenging Our Assumptions

Overview: In this session, participants first clarify the assumptions and beliefs that, while usually unstated, shape the norms and daily activities of the congregation. Next, participants question those underlying assumptions and choose to either affirm or transform them.⁷

Goals: During this session, participants will

- Identify the submerged beliefs and assumptions that shape the congregation's present reality.
- Query whether those assumptions will serve the congregation in the future, and challenge those that may limit the congregation's possibilities for growth and renewal.
- Consciously choose to either affirm or transform those assumptions and beliefs.

Materials Needed

- A flip chart and a few markers for every 3–5 participants
- Chairs for participants that can be arranged to allow for small-group work

Timeline: 60 minutes

00:00–00:05 Welcome and Connection

00:05–00:20 Part 1: Brainstorming Assumptions

00:20–00:35 Part 2: Challenging and Rewriting Assumptions

00:35–00:50 Part 3: Reporting and Reflection

00:50–01:00 Reflection and Next Steps

Preparation for Facilitator(s)

- Beyond familiarizing yourself with the exercise and setting up the room to accommodate both full-group and small-group discussions, no special preparation is required.
- The first part of this exercise can be done with the entire group of participants; the second part should be done in small groups of three to five.

Facilitation

1. Welcome

- Welcome the participants to the gathering and thank them for coming.
- Explain that this session is one of several discussions that the congregation is having as the community addresses the upcoming rabbinic transition. We are now in our discovery phase of this transition, which means that we are trying to learn more about ourselves as a congregation and who we might want to become.
- Explain the timeline for the evening. We will begin in the full group and then break into smaller groups of three to five participants.

2. Connection

Invite the participants to introduce themselves and share how long they have been part of your congregation and one thing they appreciate about the congregation.

⁷ This exercise is adapted from an exercise that can be found in [THE TOOLBOX: Resources to Experiment in Congregational Education](#), which is a project of the ECE and the HUC-JIR Rhea Hirsch School of Education.

3. Activities

Part 1: Brainstorming Assumptions

- Participants sit in a semicircle (with two or three rows, if necessary). Two flip charts are at the front of the room, with a recorder at each one. The facilitator asks, “What assumptions do we—or our fellow congregants—hold about our congregation? These should be assumptions that—whether we are really comfortable affirming them or not—our behavior seems to reflect that we accept them.”
- Assumptions are uncovered by observation. Imagine a day at our congregation. What do you see? What do you see adult members doing? What do you see children doing? What do you see clergy and staff doing? What do you see visitors doing? Based on your observations, what might you assume to be true? For example, imagine for this exercise that you can see people struggling to follow along at a Shabbat service. What assumptions does this imply? What other assumptions could be at play?
- Since part 1 is a brainstorming exercise, there are no wrong answers. The recorders take turns writing down people’s statements. If participants get stuck, the facilitator can prompt them by asking some more-specific questions, such as: “What assumptions do we have about Shabbat? Holiday celebrations? Hebrew language? Our building?”

Part 2: Challenging and Rewriting Assumptions

- In groups of three to four, participants make a note of the assumptions they would like people to continue holding and acting upon.
- They next choose three to five assumptions they believe limit the congregation’s ability to achieve its highest vision of itself and rewrite them so they become assumptions they would like the congregation to affirm.
- They can post their work on flip-chart paper on the wall.

Part 3: Reporting and Reflection

- The facilitator gives each group a chance to share the assumptions they chose to affirm as well as those they chose to rewrite.
- A discussion follows focusing on the similarities and differences among the choices.

4. Reflection

- Focusing the participants’ attention back toward the whole group, invite participants to reflect on a theme that emerged for them in the conversations, an insight they may have had, or connections built across conversations.
- The facilitator can take notes on these comments on a flip chart at the front of the room.
- As a final exercise, go around the room and invite people to share one word that expresses how they are feeling about the conversation and the future of the congregation.

5. Next Steps

- Collect the notes and recorded reflections. Save this feedback for future reference.
- Thank everyone for coming. Let them know whom to contact if they have additional thoughts or questions.
- If appropriate, inform participants about the date and time of the next gathering.

Resources for Step 5: How Will We Get There?

What Are the Main Activities in This Step?

- With board and other lay leadership, affirm strategic directions for the future. In congregations with a larger senior staff structure, professional leadership will also be included in this process.
- Work in tandem with the search team to ensure they have the information they need for their work.

While the time may or may not be right to execute a full strategic planning process (and this decision will vary from congregation to congregation), you will want the planning and discovery phase of the transition process to culminate in a clearer sense of the congregation's strategic directions for the future. This is not a job for the transition leaders alone, but one to be shared with the other hubs of congregational leadership, including the remaining professionals and the board and executive committee. Some overlap with the search team will ensure that they are able to make use of what's been learned in the discovery phase.

These URJ resources and initiatives may be useful as you embark on this final step in planning and discovery:

- [URJ Emerging Leaders Resource](#)
- *Moving to the Leading Edge: A URJ Resource and Discussion Guide to Move Your Congregation Forward* (New York: Union for Reform Judaism, 2016), vol. 1: *Principles That Drive Strong Congregations* and vol. 2: *Leadership and Governance*.

We believe that how we shape, facilitate, and nurture conversations impacts what comes out of them. This resource will introduce you to an approach to planning that is productive, engaging, and inspiring:

- [SOAR](#), an approach to strategic planning that, like Appreciative Inquiry, focuses on maximizing strengths and engages many constituents. This approach to planning may be especially useful in *Step 4: Who Are We Becoming?* and *Step 5: How Will We Get There?*

Finally, the [CCAR Placement Office](#) will be your first and most important point of contact when you are ready to begin work related to the rabbinic search itself.

Other helpful resources:

- Harold L. Sirkin, Perry Keenan, and Alan Jackson, "[The Hard Side of Change Management](#)," *Harvard Business Review*, October, 2005.
- [Ask Big Questions](#)

Have more questions? Connect with these resources:

- [URJ Consulting and Transition Management Team](#)
- [URJ Knowledge Network Team](#)
- [The Senior/Solo Rabbinic Transition group](#) in The Tent, where you can ask your own questions and get advice from other congregational leaders

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