

# **ACTING STRATEGICALLY: A MANUAL FOR SYNAGOGUE PLANNING**

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**SYNAGOGUES: TRANSFORMATION AND RENEWAL**  
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## **INTRODUCTION**

This booklet models an intensive, eighteen-month, long-range planning process that is intended to produce a long-range strategic plan. Long-range planning (LRP) is an ongoing process. The first year of work for an LRP committee is very broad in scope. Subsequent years of work will be more focused on instituting and tracking changes in response to new data and/or addressing unanticipated results from LRP innovations or addressing narrower issues in greater depth. Activities that might receive attention in subsequent years are listed but not attended to in depth. Ideally a new comprehensive plan will be determined anew, every five years or more, with smaller projects done in more depth during the interim years. Monitoring the implementation of the long-range plan, making modifications based on new information and the results of implementation, and conducting small-scale, in-depth projects will occupy the LRP committee during the interim years, which is why it should be a standing committee of the congregation.

### **The Purpose of Long-Range Planning**

The purposes of long-range or strategic planning are:

- to redefine the vision and mission of the congregation;
- to consider demographic, competitive and other challenges facing the congregation;
- to reassess the structure, function, audiences and efficiency of the congregation; and
- to develop measurable objectives that move the congregation from its present state toward more complete fulfillment of its redefined mission.

If the LRP process is done well, there will be major indirect benefits for the congregation.

These include increased unity among leaders, increased understanding of the institution, and momentum to create any needed change in organizational culture.

### **Project Stages**

The long-range-planning process incorporates five stages over an eighteen-month period. Each stage is described in detail below. In stage one the chairperson and members of the long-range-planning committee are determined. In stage two the committee members are oriented to the LRP tasks, and the preliminary scope of the committee work is identified. Subcommittees are formed, and the initial list of issues to be addressed is approved. In stage three the LRP retreat is planned and held. In stage four the research and planning work of the committee is carried out. Analysis of this work generates the key recommendations for the LRP. Sections of the report are written as work is completed and presented for committee and board approval as needed. In stage five the writing of the final report is completed and presented to the board for approval. (For an outline of the planning document, see Appendix 5.)

### **BOARD CHARGE TO THE LONG-RANGE-PLANNING COMMITTEE**

The long-range-planning process begins when the board of directors after consultation with the rabbi and other senior staff charges the long-range-planning committee with the responsibility for considering most or all of the following key issues:

- Mission
- Vision
- Values
- External and Internal Challenges and Opportunities
- Program

- Governance Structure
- Staffing
- Lay-Professional Relations
- Leadership Development
- Congregational Stability and Growth
- Physical Facilities
- Finances
- Communications and Marketing
- Development Strategies.
- 

While long-range planning requires an extensive amount of work, the project can be accomplished effectively by carefully following the processes, recommendations, timelines and task assignments suggested below. The project stages are laid out in chronological order, but it is advisable to read about the entire process before implementing the first stage.

### **Resources Needed**

- **Staffing**

The long-range-planning process will require extensive staff support and links to congregational decision-making structures within the synagogue. Significant time for staff and volunteer training is necessary for the initial planning process to be successful, but much less time will be necessary in subsequent years.<sup>1</sup> In smaller congregations most of the work falls to the committee, although the office staff can usually provide significant amounts of data. In larger congregations much of the staffing falls to the executive director and the administrative and support staff. Organizational research, oversight of the planning process, administrative planning for meetings (invitations, notices, refreshments, setups, etc.) and extensive writing require staffing. It is important to ascertain whether there will be sufficient resources for the planning effort within the existing staff, whether volunteers have the time and skills needed and for which functions an outside consultant is needed.

- **Consultants**

Most congregations that successfully complete long-range plans in a timely way receive at least some help from paid consultants. A consultant can be brought in to work with the committee for its entire duration as a guide and/or as the primary staff for the project. The involvement of a consultant for the full duration of the planning process is most likely to result in a successfully implemented plan because the consultant can help with process issues, the provision of alternative approaches used in other settings, problem solving and even writing.

If it is financially impossible to engage a consultant for the entire process, it is still advisable to bring in consultants when a specific form of specialized expertise such as facilitating the retreat is needed. Whether there is a consultant for the whole process or not, specialists might also be helpful for deepening the thinking about such issues as

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<sup>1</sup> A long-range-planning process should not take place during a new rabbi's first year or while a search for a new rabbi is underway.

space planning, marketing and market research, resource development, communications, volunteer recruitment, liturgical change, or any other area where the committee does not have sufficient internal resources. Having an able consultant who plays a role from the beginning to the end of the project will enhance the quality of the work, increase its depth and enhance the likelihood of its completion.

Consultants may be important in keeping planning on schedule, providing information about best practices in synagogue management, suggesting alternative responses to issues, and obtaining access to comparative synagogue data. The consultant's involvement usually results in a more thorough examination of congregation challenges, deeper consideration of how to implement the congregation's mission and recommendations that are more likely to be implemented.

- **Committee Expenses**

It is important to insure there is a sufficient budget for the LRP committee. The single largest category of expense is often for consultants. Other expenses might include costs related to supplementing staff; those related to the retreat such as space rental, food, photocopying and supplies; and other incidental costs.

## **STAGE 1: FORMATION OF THE LONG-RANGE-PLANNING COMMITTEE**

### **APRIL**

**The president, in consultation with the rabbi, executive director<sup>2</sup> and officers, appoints a chairperson for the LRP committee.** The chairperson should be open-minded and capable of directing complex projects, and should have excellent interpersonal skills, as well as a strong, positive relationship with the president and rabbi, and credibility with the congregation. The capacities to accomplish complex projects and to think strategically are critical in order to maintain a disciplined focus on major strategic concerns and complete the planning process in a timely way. There is a major advantage to selecting the vice president who is next in line to be president to chair the committee because that person will play a central role in implementing the LRP recommendations.

**The president and chairperson jointly appoint a committee with input from the rabbi and executive director.** When committee members are asked to serve, it is critical that they understand what is expected of them and the nature of the time commitment. An LRP cycle is an intensive process of at least a year's duration. It ends when the congregational board approves the long-range plan. For the LRP committee to work effectively, committee members need to attend virtually all committee meetings and take responsibility for a variety of tasks that will need to be accomplished outside the meetings. Individuals not on the committee will also be involved in many of these tasks (as focus-group facilitators and recorders, and as specialists on subcommittees, for example).

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<sup>2</sup> If a congregation is not large enough to have an executive director (ED) but has an administrator whom it would be helpful to involve, that person can be consulted instead. Wherever an ED is referred to in this document, that will be the case.

It should be emphasized that there is an extraordinary trust in the committee and opportunity for committee members. They will both learn a great deal about their community and shape its future. It will be helpful for some committee members to participate in more than one planning cycle. Following adoption of the plan, the committee will usually be charged with overseeing implementation, considering modifications based on new information, and exploring issues that could not be sufficiently researched or resolved during the initial planning period.

**Long-Range-Planning Committee Composition: The ideal size of a LRP committee is between nine and fifteen members. The committee should include:**

- a. Long-range-planning chairperson
- b. Current and future presidents: It typically takes four to six years to fully carry out a long-range plan. Including the future presidents helps ensure long-term commitment to executing the plan.
- c. People with different expertise relevant to planning in areas such as marketing, staffing, finance, group history, architecture and programming.
- d. Opinion leaders – elder statesmen or those who shape opinions within the congregation.
- e. Major financial givers and/or those who have influence with givers.
- f. Representation reflective of the congregation in terms of demographics, ideologies, observance levels, gender, age groups, geography, and family structure.
- g. Ex officio – rabbi (and executive director depending on synagogue structure).
- h. The secretary’s role for the committee is especially important. The committee chair should clarify with the committee’s secretary before the committee work begins that he or she is willing to show the chairperson the minutes and other documents for revisions and corrections before they are sent out.

It is important to define at the outset the roles and extent of involvement of the rabbi, executive director and other professionals in the planning process. They have invaluable knowledge and informed opinions, and the outcomes of the planning process will directly affect their work. They should know from the outset the expectations that will be placed on them and the access they will have. When an executive director will be the key staff person, she or he can be made the liaison to the rest of the staff, a task that should otherwise rest with the rabbi or committee chair. Ultimately, the planning decisions should be in the hands of the committee members.

## **STAGE 2: COMMITTEE ORIENTATION, CHARGE AND SUBCOMMITTEE FORMATION**

### **MAY**

**The chairperson convenes the committee and orients the members to the nature of the LRP process and the time frame for its completion.** This is best done in two meetings before the retreat. The agenda for these meetings includes the following items:

- Identify the congregational vision and what the gaps are between the vision and current reality.
- Review the existing congregational mission statement and identify if it needs to be revised or can be endorsed at the retreat.
- In an initial brainstorming session generate a list of major issues that the committee should explore over the course of the year. The preliminary list of major issues should be discussed by the officers or executive committee at a subsequent meeting and expanded as needed.
- Determine which subcommittees are needed and develop a preliminary plan for addressing issues. Some possible subcommittees include mission/vision/values, retreat, program, external research, building and architecture, finance, communications, marketing, development, governance, staffing and lay-professional relations. The membership of these subcommittees should be determined as soon as possible. Subcommittee members might include some officers, standing committee chairs and others with specialized knowledge or expertise, along with LRP committee members.

### **JUNE/JULY**

**At the second meeting of the committee, the revised list of LRP issues should be ratified, and the members of at least the first set of subcommittees should be appointed.**

**Subcommittee charges should include but not be limited to:**

- Revising or generating mission/vision statements if needed and a values statement if desired.
- Generating a list of research to be conducted. It is important to collect relevant existing data from both inside and outside the synagogue. It is essential to evaluate whom the congregation serves, how it serves and whom it can or should be serving.

Internal data can be a valuable tool for examining program, volunteer and staff structures, and finances. Previous long-range plans, financial statements, lists of programs, synagogue bulletins from recent years and other publicity materials, bylaws, tables of organization and other documents should be gathered and reviewed.

External data can be a valuable means for examining shifting communal demographics. This data should be considered early in the LRP process. Data can be gathered from federal census information, the local chamber of commerce, local publications, Jewish federation demographic studies, and neighborhood studies. It might also be important to consider competing institutions and congregations, what is happening to them and how that affects the future of the congregation.

- Organizing focus groups (see stage three below for more discussion of focus groups). The preliminary work of deciding the composition of focus groups and questions to be asked cannot be completed until data from the LRP retreat is available. However, much of the work can be done in advance of the retreat. This includes making preliminary determinations about the composition of the focus groups and the questions to be asked, recruitment of skilled facilitators and recorders, and planning for their training.
- Forming the retreat subcommittee. The retreat sub-committee should determine the retreat date in consultation with the executive director, rabbi and president, location, facilitator, agenda, food and supplies needed. (See Appendix 2A.) Retreat attendees should include: the LRP committee, board of directors, key decision makers/opinion makers and key professional staff. It is important for the retreat to be held in a room of sufficient size with comfortable chairs. Ideally the lunch area will be different from the meeting area.

A save-the-date notice should be sent out to invitees well in advance of the retreat followed by a letter of invitation signed by the president, LRP chair and rabbi (see Appendix 2B). Follow-up calls should be made to insure good attendance.

### **STAGE 3: RETREAT AND FOCUS GROUP RESEARCH**

#### **SEPTEMBER**

**Retreat goals and objectives:** The LRP retreat serves to orient all leaders of the synagogue to the planning effort and its direction. The retreat enables all key congregational leaders to have input to the LRP process regarding their concerns and the challenges facing the congregation. This information is vital to the committee, and the process increases buy-in from key people whose support will be important for ratification of the plan and its implementation. It is important at the retreat to review the mission statement, identify and focus appreciation on congregational successes and what members have to celebrate, clarify concerns and challenges, and educate leaders about the planning process.

#### **The retreat format includes the following:**

##### Saturday Evening

1. Ice-breaker – Ask each participant three questions: how long has he or she been a member, what was the person’s most important reason for joining, what does the person care most about in the congregation now? These questions will help identify patterns of leadership involvement, highlight what the congregation is doing right and build a sense of good feeling and cohesion among participants.
2. Review the Congregation’s Mission and Vision Statements. If there is not a mission statement, brainstorm about what it should contain. If there is one, brainstorm about any changes needed.

Sunday – (typically 9 am to 3 pm)

1. Consider Program Objectives (see Appendix 3A). This could begin with people making lists for themselves, then combining lists aloud, then discussing priorities.
2. List Target Audiences/Constituencies. These will reflect the diversity of family structure, ideology, age, interests, knowledge and observance. Brainstorm.
3. Review the Long-Range-Planning Objectives List prepared by the LRP committee and critique and make suggestions for additions or revisions.
4. Invite Other Concerns.
5. Introduce issues of Structure and Finance.

Snacks and drinks should be available at all times. Lunch should be served when there is a natural program break after noon. There should also be mid-morning and mid-afternoon breaks of 15 minutes each. Food should be plentiful and satisfying.

**Focus-Group Research: The focus-group subcommittee is responsible for all phases of the focus-group research (see Appendices 4A-H):**

- Completing focus-group questions (see Appendix 4H).
- Presenting lists of focus groups and focus-group questions to LRP for approval.
- Setting up the focus groups. Focus-group lists must be finalized after the retreat.
- Choosing and training facilitators and recorders. Ideally focus group leaders should be either experienced group leaders, psychological researchers who work with small groups, marketing professionals, or individuals with group social work or group therapy backgrounds. The role of the recorder is not to participate in the discussion but to encourage participation and provide a written record of the session. Comments should be recorded anonymously so that people's privacy is respected. As part of their training, recorders should review the training materials (see Appendices 4C – 4G).
- Scheduling facilitators and recorders for focus groups.
- Issuing invitations (see Appendix 4B). Follow up with phone calls, email and/or written reminders as fits the community.

## **STAGE 4: RESEARCH, ANALYSIS AND REPORTING**

### **OCTOBER/NOVEMBER**

**The research subcommittee collects data, organizes it and presents it to the LRP committee.** The focus group subcommittee conducts all of its focus groups. The minutes of the focus-group meetings are compiled, and the focus-group subcommittee chair writes a single written summary of the focus groups. It should be presented first to the LRP committee and subsequently to the congregation's board and committee chairs. The results can be presented to the community as a whole that would be useful.

**The mission statement subcommittee completes the drafts of the mission statement (see Appendix 1A for samples) and vision statement if desired, and presents them to the LRP committee for ratification.** A synagogue mission/vision statement will usually include something about ideological orientation, affiliation and location or service area. It will say something about its primary program and/or values thrust. While it is important that the

mission/vision statement be succinct, the mission statement should indicate what is unique about the synagogue. Some congregations find it helpful to charge each committee of the congregation at this point with producing its own mission statement as well as a list of measurable objectives.

Once the mission/vision statement is ratified, the LRP committee then presents the statement to the Board for its ratification. The mission/vision statement will probably be the first section of the plan to be completed. Each section of the plan should be written as soon as recommendations are finalized. In each case, recommendations should be placed in the context of data.

**The program subcommittee takes materials from the LRP retreat and any existing congregational materials about program objectives (see samples in Appendix 3A) and drafts a new list of program objectives for the congregation.** The program subcommittee also generates a program grid (see sample in Appendix 3B). Across the top of the grid are the major categories of program objectives. Down the left side of the grid, the congregational target constituencies are listed. All the programs of the congregation are listed in each resulting box where they fit. Some programs will be listed in more than one box. When materials from the focus groups become available, the program subcommittee should revise its documents to reflect this information. All of these documents should then be presented to the LRP committee, which should review them carefully. Analysis of these documents should generate recommendations regarding:

- Gaps in programming
- Over-programming
- Program design issues
- Program volunteer and staffing issues
- Issues in communications and marketing
- Issues in efficiency and effectiveness.

**The building and architecture subcommittee should gather data regarding the state of repairs of the building from the relevant standing committee(s) and from staff.** The subcommittee should inquire about deferred maintenance. It should investigate whether the building is configured in a way that supports the congregation's mission and program in light of its constituents.

## **DECEMBER**

**The focus-group subcommittee completes the focus-group and other research.**

**The program subcommittee completes the program grid and utilizes information from the focus groups to modify program objectives, outline ideal programs and make comparisons to the program grid.** This should bring the program subcommittee to the point where it can complete a list of recommendations to the LRP committee.

**The LRP committee should review its mission and values statements in light of the program objectives and research on constituencies to ensure they are harmonized, and should also review subcommittee recommendations.**

**The communications subcommittee should conduct a communications audit.** It should consider the effectiveness of communication and marketing in light of target audiences and focus group data. The subcommittee should review all of the methods used by the congregation for communications. These include public announcements, email notices, mailings, phone-squads, information meetings, newsletter, website, etc. Data from focus groups should be reviewed in this context.

Questions to be asked include: Are our communications sufficiently segmented? (Segmentation means that only people for whom a particular aspect of the program is relevant will receive information about the program.) Are we communicating with clarity and effectiveness? Are we communicating efficiently? Do our communications enhance the image of our congregation? Recommendations that emerge from the communications audit should be submitted to the LRP committee.

## **JANUARY**

**The LRP committee presents its research and recommendations to the board and to relevant congregational committees.** In some cases, committees will see immediate uses for this information. The committees should feel free to make use of it.

**The governance and staffing subcommittees define volunteer and professional staffing needed to support ideal programs and communication.** They develop appropriate staff and volunteer tables of organization and job descriptions.

**The finance subcommittee assembles a budget that includes ideal staff and facilities, and the finances and fundraising that would support them.**

**The LRP committee should obtain feedback about recommendations from the relevant committees of the congregation.** Their support will be critical for ratification and implementation of the LRP.

## **FEBRUARY-MARCH**

**The LRP committee reports to the board on its progress.**

**The Finance subcommittee considers the gap between the current staff and budget situation and the ideal.** It devises a multi-year plan to move from the present situation toward a more ideal one. This requires phasing of all the kinds of change.

The finance subcommittee calculates the fundraising needed and formulates a plan for accomplishing it. Major changes are underway in how congregations fund their expenses. The finance subcommittee should consider alternative dues systems, the role of relationship-based fundraising, the nature of planned giving and endowment programs and the kind of staffing needed to secure adequate funding.

**The LRP committee considers, modifies and finalizes the financial plan.**

## **STAGE 5: FINAL REPORT AND BOARD APPROVAL**

### **APRIL/MAY**

**The LRP committee completes the writing of the long-range plan (see Appendix 5 for LRP Report Format).** Where tasks require multi-year efforts, the plan should suggest timetables for task completion. The plan is approved by the LRP committee, which then presents the plan to the board, receives feedback and makes any necessary modifications.

### **JUNE-SEPTEMBER**

**The LRP plan is presented to the board for final ratification.** The board discusses the plan over several meetings or at a one-day retreat, concluding with the plan's ratification. A summary of the plan is communicated to the congregation. The full plan can be made available to members on the congregation's website.

The long-range planning committee convenes to discuss oversight of implementation and areas needing further research and consideration.

## **APPENDIX 1: MISSION/VISION STATEMENTS**

Mission statements encourage self-understanding and self-evaluation. A congregation's mission statement should identify what makes it unique.

The first sentence of a congregation's mission statement should describe the congregation's nature and what it wants to accomplish. Anything unique should follow.

### **SAMPLE MISSION/VISION STATEMENTS:**

#### *Germantown Jewish Centre, Philadelphia PA:*

The Germantown Jewish Centre is a vibrant, pluralistic and egalitarian synagogue located in Mount Airy and committed to sustaining and strengthening Jewish life in greater Philadelphia. Affiliated with the Conservative movement and receptive to the wisdom of many sources in Judaism, we engage in life-long Jewish learning and strive to make Judaism relevant and important to our members' lives. As a welcoming community, we embrace a wide diversity of Jewish lifestyles and households. Encouraging a variety of styles and settings for religious practice, we foster multiple prayer communities. We sustain each other by celebrating holidays and life-cycle events, and by sharing in cultural and social activities, social activism, and community building. We support the State of Israel and *Klal* Israel. We work to strengthen Northwest Philadelphia through civic and interreligious activities. To these ends, we maintain a fiscally sustainable institution.

#### *B'nai Keshet, Montclair NJ:*

Bnai Keshet is a vibrant Reconstructionist congregation that values both the unique individual backgrounds and beliefs of its diverse members and our shared historical traditions. We celebrate our role as participants in the evolution of Judaism by engaging our tradition thoughtfully, so it remains meaningful and relevant to each of us. In this spirit we are committed to lifelong education, to *hesed*, to *tikkun olam*, and to sharing important life events. We are an informal and respectful community moved by prayer, fired by lively discussion, lightened by laughter and song.

#### *Agudath Israel, West Caldwell NJ:*

Each of the Five Books of Moses emphasizes dimensions of Jewish life: Genesis [Small Group Bonding], Exodus [The Blessing of Torah], Leviticus [Ritual and Spirituality], Numbers [Making A Better Society], Deuteronomy [Bonding with all types of Jews]. We at CAI are proud of our role as a leading and pro-active egalitarian Conservative congregation that embodies these five principles in a pluralistic manner for all ages and stages of Jewish living. We provide an extraordinary variety of religious, educational, cultural and recreational venues, planned jointly and pro-actively by an exemplary professional staff and an engaged lay leadership. We help our diverse and multi-generational membership to experience Judaism in ways that have personal meaning and promote Jewish values for people moving through the Jewish life cycle. We seek to enable our members to ascend "the ladder of Jewish commitment" at their own pace, feeling more and more part of our "second home" as a CAI family.

## **APPENDIX 2: PLANNING RETREAT**

### **2A: RETREAT LOGISTICS**

#### SET UP:

A meeting room and separate room or space for eating. Chairs should be set up in concentric semi-circles with two easels at the open end. The seats should be arranged in view of wall space where sheets from easel pads can be posted. In the eating area, chairs should surround tables.

#### SUPPLIES:

2 easels

2 Easel pads (preferably with self-adhesive backing)

Markers

Masking tape

Writing pads and pens for participants

Nametags: Participants will need nametags for both days of the retreat.

Current Mission Statement: Enough copies for both days in either 14 or 12 point type

#### FOOD:

Saturday Evening – Dessert and hot and cold drinks.

Sunday – Breakfast, snacks, lunch, and hot and cold drinks. It is important that congregants feel they are being fed well and that they can snack throughout the day.

## 2B: SAMPLE RETREAT INVITATION



### Germantown Jewish Centre

400 West Ellet Street  
Philadelphia, PA 19119-3097  
Tel. (215) 844-1507  
Fax (215) 844-8309  
www.GermantownJewishCentre.org

October 4, 2006

Dear GJC Lay Leader,

Shanah Tovah!

**We are writing to invite you to join our upcoming GJC long range planning retreat scheduled for October 21 and 22.** The retreat will formally launch our shul's next stage of development and set the stage for our upcoming 75<sup>th</sup> anniversary celebration and capital fund raising effort.

Most of us know how blessed we are to have our "home" here. Our professional staff is outstanding, and our lay leadership is committed, caring and competent. We offer a wonderful menu of programs. We are an open and inviting community to new members, and we have many more positive attributes.

Precisely as we count our many blessings this is the right moment for reflection and assessment: How can we take advantage of our current strengths? Are we offering what our fellow congregants want and need? What is our mission, our vision? What are our short and long range goals and how should we get there?

**On Saturday evening, October 21 from 7:30 to 10:30 PM and on Sunday, October 22 from 8:30 AM to 12:45 PM,** we will embark on a journey together to answer these questions. The Board, committee chairs, leaders of our professional staff, and the long range planning committee all have been invited to participate in this process. Using the input we gain from this session, the Long Range Planning Committee will undertake a year-long process to lay-out a plan for implementing our shared vision and goals. We will be led by Rabbi David Teutsch and Sandy Rubenstein, through STAR (the folks who brought us SYNAPLEX). They bring experience and perspective that should be invaluable to us in the coming year.

During the retreat we will be considering the mission of the congregation, our overall objectives and the key issues to be considered in the long-range plan. Since these concerns interact with each other, it is critical that you attend the entire retreat. This is an important opportunity to gain input from our congregation's leaders that will shape the long-range plan at the outset of the committee's work.

**Joshua Z. Goldblum**  
President

**Leonard D. Gordon**  
Rabbi

**Rachel Gross**  
Executive Director

**Gloria Geissler**  
Finance Director

**Felicia Rosen**  
Education Director

**Sally Shenker**  
Early Childhood Director

**Elana Shaw**  
Program Director

**Adam Zeff**  
Student Rabbi

Rabbi Leonard Gordon

Rabbi David Teutsch

Norman Newberg

Sarah Braun

Co-chairs, Long Range Planning Committee

## **APPENDIX 3: PROGRAM ANALYSIS**

### **3A: SAMPLE PROGRAM OBJECTIVES**

Program objectives set the direction of the congregation's program. These are categories of objectives the congregation wants to fulfill, rather than specific programs. The following is a sample list of program objectives for a congregation.

#### **I. Formal Jewish Education**

- A. Create opportunities to learn at every age and life stage;
- B. Teach skills necessary for full participation in Jewish life; promote increased understanding and observance;
- C. Promote understanding of Jewish life in Israel and involvement with the land and its people;
- D. Develop Jewish leaders;
- E. Promote study for its own sake.

#### **II. Informal Jewish Education**

- A. Provide relaxed forums for learning that:
  - 1. Allow for creative participation
  - 2. Attract additional subgroups of learners
  - 3. Increase membership development;
- B. Create the opportunity for experimentation and innovation;
- C. Integrate day school students into life of synagogue;
- D. Support the formation and deepening of Jewish identity;
- E. Integrate our experiences as Americans and as Jews.

#### **III. Pastoral / *Gemilut Hesed***

- A. Provide comfort and support in times of need;
- B. Strengthen the sense of community;
- C. Preserve community by strengthening individual members in need;
- D. Offer the opportunity to fulfill the mitzvah of serving others (*Gemilut Hesed*).

#### **IV. Worship / Spirituality**

- A. Provide opportunities to worship in a variety of styles and settings that promote spiritual depth, the teaching of Torah and a greater awareness of God;
- B. Ensure communal observance of mitzvot and encourage individual observance;
- C. Maximize opportunities for communal Shabbat and holiday celebrations, for community gatherings and fellowship in a Jewish context;
- D. Provide for communal observance of members' life-cycle events.

#### **V. Tikkun Olam / Social Action / *Tzedeka***

- A. Repair the world;
- B. Connect Jewish learning and Jewish study with positive change in the world;
- C. Encourage active, individual participation in the Jewish community and the community at large;

- D. Increase understanding of Jewish, community, local, national and world issues;
- E. Share with the broader community the resources of the congregational community.

**VI. Social and Cultural Opportunities / Community Building**

- A. Create opportunities to engage in Jewish cultural programming;
- B. Create a sense of community;
- C. Bring people of all ages together.

**3B: SAMPLE PROGRAM GRID**

| <b>Constituencies</b>              | <b>Worship/Ritual/Spiritual</b>        | <b>Education</b>                                 | <b>Hesed</b>                 | <b>Tikum Olam</b>                             | <b>Social</b>                        | <b>Cultural</b>                                  |
|------------------------------------|--|--|------------------------------|---|--------------------------------------|--|
| Programming for all constituencies | Funeral/unveiling                      | Values in Action<br>Israel Education             | Bereavement<br>Counseling    | Darfur  | Hazon Bike Ride                      | BK Book Fair                                     |
|                                    | Havdalah Services                      |  | Divorce Counseling           | Food Drive/Mazon                              | Holiday Services and<br>Celebrations | Holiday Services and<br>Celebrations             |
|                                    | High Holy Days Services                |  | Family Counseling            | Greening Our<br>Synagogue                     | Kiddush                              |  |
|                                    | Holiday Services and<br>Celebrations   |  | Grief Counseling             | Hazon Bike Ride                               |                                      |  |
|                                    | Kabbalat Keshet Services               |  | MetroWest Mitzvah<br>Day     | HOME Corp                                     |                                      |  |
|                                    | Kiddush                                |  | Outreach to those in<br>need | Interfaith Hospitality<br>Network             |                                      |  |
|                                    | Shabbat Morning Services               |  | Pastoral Counseling          | Marriage Equality<br>MetroWest Mitzvah<br>Day |                                      |  |
|                                    | Shiva Minyan                           |  | Shiva Minyan                 |   |                                      |  |
|                                    | Conversion Counseling                  | 9:00 Torah study                                 | Blood Drive                  | Blood Drive                                   | Adult Bnai Mitzvah<br>Class          | BK Reads   |
|                                    | Friday Morning Minyan                  | Adult Bnai Mitzvah<br>Class                      | Conversion<br>Counseling     | Conversion<br>Counseling                      | Clothing Drive                       | Cultural & Arts<br>(films, books, art,<br>music) |
|                                    | Interfaith Services                    | BK Reads   | Friday Morning<br>Minyan     | Friday Morning<br>Minyan                      | CROPWalk                             | BK Reads   |
|                                    | Intrafaith Services (e.g.<br>Tashlich) | Cultural & Arts<br>(films, books, art,<br>music) | JRF Convention               | JRF Convention                                | Dress for Success                    | BK Softball                                      |
|                                    | Women's Rosh Hodesh<br>Group           | Hebrew for Adults                                | manual of resources          | Interfaith Services                           | JRF Convention                       | Cultural & Arts<br>(films, books, art,<br>music) |

| <b>Constituencies</b>                      | <b>Worship/Ritual/Spiritual</b>     | <b>Education</b>           | <b>Hesed</b>                | <b>Tikun Olam</b>               | <b>Social</b>                                | <b>Cultural</b>    |
|--|-------------------------------------|----------------------------|-----------------------------|---------------------------------|--|--------------------|
|  |                                     | Intro to Judaism           | referral to social agencies | Jubilee Interfaith Organization | Men Who Cook                                 |                    |
|  |                                     | Intro to Reconstructionism | Retirement Counseling       | Rachel Coalition                | New Member Coffees (Get to know you w/Rabbi) |                    |
|  |                                     | Jewish History Study Group | visiting the homebound      |                                 | Roast  |                    |
|  |                                     | JRF Convention             | Visiting the Sick           |                                 | Social Fundraising events                    |                    |
|  |                                     | JRF Regional Seminars      |                             |                                 | Women's Rosh Hodesh Group                    |                    |
| Families                                   | Brit Milah                          |                            | Behavior-related Counseling | CROPWalk                        | BK Kids Club                                 |                    |
|  | Ess & Schmooze Potluck Dinners      |                            | BK Kids Club                | Interfaith Services             | BK Softball                                  |                    |
|  | Interfaith Services                 |                            | Brit Counseling             |                                 | Ess & Schmooze Potluck Dinners               |                    |
|  | Intrafaith Services (e.g. Tashlich) |                            |                             |                                 | Pride Havurah                                |                    |
|  | Kabalat Keshet Family Services      |                            |                             |                                 |  |                    |
| Families of preschoolers (under age 5)     | Baby Naming                         | Family Beit Midrash        | Baby Naming                 |                                 | BK Kids Club                                 |                    |
|  | Kabalat Keshet Family Services      | PJ at BK                   | BK Kids Club                |                                 | Bnai Bnai Keshet (PreK-2nd grade w/parents)  |                    |
|  | PJ at BK                            |                            |                             |                                 | PJ at BK                                     |                    |
|  | Tot Shabbat                         |                            |                             |                                 | Play Group (infants and toddlers)            |                    |
| Families of Pre K to 2 <sup>nd</sup> grade | Bet Class Havdalah                  | Bet Class Havdalah         | BK Kids Club                |                                 | Bet Class Havdalah                           | Bet Class Havdalah |

| <b>Constituencies</b>   | <b>Worship/Ritual/Spiritual</b>             | <b>Education</b>                            | <b>Hesed</b> | <b>Tikun Olam</b>            | <b>Social</b>                               | <b>Cultural</b>                   |
|---|---|---|--------------|------------------------------|---|-----------------------------------|
|   | Bnai Bnai Keshet (PreK-2nd grade w/parents) | Bnai Bnai Keshet (PreK-2nd grade w/parents) |              |                              | BK Kids Club                                | Family Dinners (PreK - 7th grade) |
|   | Family Dinners (PreK - 7th grade)           | Family Beit Midrash                         |              |                              | Family Education                            |                                   |
|   | Kabbalat Keshet Family Services             | Family Education                            |              |                              | PJ at BK                                    |                                   |
|   | PJ at BK                                    | PJ at BK                                    |              |                              |   |                                   |
|   | Tot Shabbat                                 |   |              |                              |   |                                   |
| Families of Children 3 <sup>rd</sup> grade thru 7 <sup>th</sup> grade | 3rd Grade Consecration                      | 3rd Grade Consecration                      | BK Kids Club | 6th grade Tikun Olam Project | 7th Grade Graduation                        | Family Dinners (PreK - 7th grade) |
|   | Family Dinners (PreK - 7th grade)           | 7th Grade Graduation                        |              |                              | BK Kids Club                                |                                   |
|   | Junior Congregation                         | Family Education                            |              |                              | Family Education                            |                                   |
|   | Kabbalat Keshet Family Services             |   |              |                              |   |                                   |
| Families Teens 8 <sup>th</sup> grade thru 12 <sup>th</sup> grade      |   |   |              |                              |   |                                   |
| Preschoolers (under age 5)  | PJ at BK                                    | Family Beit Midrash                         | BK Kids Club |                              | BK Kids Club                                |                                   |
|   | Tot Shabbat                                 | Family Education                            |              |                              | Family Education                            |                                   |
|   |   | PJ at BK                                    |              |                              | PJ at BK                                    |                                   |
|   |   | PreK-3 Holiday Workshop                     |              |                              | Play Group (infants and toddlers)           |                                   |
|   |   | Religious School                            |              |                              |   |                                   |
| Children - Pre K to 2 <sup>nd</sup> grade                             | Bet Class Havdalah                          | Bet Class Havdalah                          | BK Kids Club |                              | Bet Class Havdalah                          | Bet Class Havdalah                |
|   | Bnai Bnai Keshet (PreK-2nd grade w/parents) | Bnai Bnai Keshet (PreK-2nd grade w/parents) |              |                              | BK Kids Club                                | Family Dinners (PreK - 7th grade) |
|   | Family Dinners (PreK - 7th grade)           | Family Beit Midrash                         |              |                              | Bnai Bnai Keshet (PreK-2nd grade w/parents) |                                   |

| Constituencies   | Worship/Ritual/Spiritual          | Education                     | Hesed                        | Tikun Olam                          | Social                        | Cultural                          |
|--|-----------------------------------|-------------------------------|------------------------------|-------------------------------------|-------------------------------|-----------------------------------|
| Children - 3 <sup>rd</sup> grade thru 7 <sup>th</sup> grade      | PJ at BK                          | Family Education              |                              |                                     | Family Education              |                                   |
|  | Tot Shabbat                       | PJ at BK                      |                              |                                     | PJ at BK                      |                                   |
|  |                                   | Religious School              |                              |                                     |                               |                                   |
|  | 3rd Grade Consecration            | 3rd Grade Consecration        | BK Kids Club                 | 6th grade Tikkun Olam Project       | 7th Grade Graduation          | Camp JRF                          |
|  | Bnai Mitzvah Coaching             | 7th Grade Graduation          | Bnai Mitzvah Parent Meetings | 7th grade Community Service Project | BK Kids Club                  | Family Dinners (PreK - 7th grade) |
|  | Bnai Mitzvah Parent Meetings      | Bnai Mitzvah Coaching         |                              |                                     | BK Softball                   |                                   |
|  | Camp JRF                          | Camp JRF                      |                              |                                     | Camp JRF                      |                                   |
|  | Family Dinners (PreK - 7th grade) | Keshet Kinder (3rd-5th grade) |                              |                                     | Keshet Kinder (3rd-5th grade) |                                   |
|  |                                   | Noar Keshet (6th-8th grade)   |                              |                                     | Noar Keshet (6th-8th grade)   |                                   |
|  |                                   | Religious School              |                              |                                     |                               |                                   |
| Children Teens 8 <sup>th</sup> grade thru 12 <sup>th</sup> grade |                                   |                               |                              |                                     |                               |                                   |
|  | Camp JRF                          | Camp JRF                      | Girls' Rosh Hodesh           | Moe Goldberger Award                | BK Softball                   | Camp JRF                          |
|  | Girls' Rosh Hodesh                | Girls' Rosh Hodesh            |                              |                                     | Camp JRF                      | Girls' Rosh Hodesh                |
|  |                                   | Hebrew High                   |                              |                                     | Girls' Rosh Hodesh            |                                   |
|  |                                   | JRF Teen Kallah               |                              |                                     | Hebrew High                   |                                   |
| Special needs kids   |                                   |                               |                              |                                     | JRF Teen Kallah               |                                   |
|  | Camp JRF                          | Camp JRF                      |                              |                                     | Camp JRF                      | Camp JRF                          |
|  |                                   | Learning Consultant           | Learning Consultant          |                                     |                               |                                   |
| Day school kids/non-religious school attendees                   |                                   | Religious School              |                              |                                     |                               |                                   |
|  | Camp JRF                          | Camp JRF                      | BK Kids Club                 |                                     | BK Kids Club                  | Camp JRF                          |
|  | Family Dinners (PreK - 7th grade) |                               |                              |                                     |                               | Family Dinners (PreK - 7th grade) |
|  | Kabalat Keshet Family Services    |                               |                              |                                     | Camp JRF                      |                                   |

| <b>Constituencies</b>               | <b>Worship/Ritual/Spiritual</b> | <b>Education</b>           | <b>Hesed</b>          | <b>Tikun Olam</b> | <b>Social</b>     | <b>Cultural</b> |
|-------------------------------------|---------------------------------|----------------------------|-----------------------|-------------------|-------------------|-----------------|
| College kids/Young Adults           | Camp JRF                        | Camp JRF                   | Conversion Counseling |                   | BK Softball       | Camp JRF        |
| Single adults                       | Conversion Counseling           |                            | Wedding Planning      |                   | Camp JRF          |                 |
| Single parents                      |                                 |                            | BK Kids Club          |                   | BK Kids Club      |                 |
| Couples without children            |                                 |                            |                       |                   |                   |                 |
| Empty nesters                       |                                 | Jewish History Study Group |                       |                   | Renaissance Group |                 |
|                                     |                                 | Renaissance Group          |                       |                   |                   |                 |
| Retirees/seniors                    |                                 | Jewish History Study Group |                       |                   | Renaissance Group |                 |
|                                     |                                 | Renaissance Group          |                       |                   |                   |                 |
| GLBTI                               |                                 |                            |                       |                   | Pride Havurah     |                 |
| Interfaith (mixed marrieds/couples) | Conversion Counseling           |                            | Conversion Counseling |                   |                   |                 |
| Prospective members                 | Conversion Counseling           | 9:00 Torah study           | Conversion Counseling |                   |                   |                 |
|                                     |                                 | Family Beit Midrash        |                       |                   |                   |                 |
|                                     |                                 | Intro to Judaism           |                       |                   |                   |                 |
|                                     |                                 | Intro to Reconstructionism |                       |                   |                   |                 |
|                                     |                                 | Jewish History Study Group |                       |                   |                   |                 |
| Ritually engaged/tradition          |                                 | Prospective Member Coffees |                       |                   |                   |                 |
|                                     |                                 | 9:00 Torah study           |                       |                   |                   |                 |

| <b>Constituencies</b>   | <b>Worship/Ritual/Spiritual</b> | <b>Education</b>           | <b>Hesed</b> | <b>Tikun Olam</b> | <b>Social</b> | <b>Cultural</b> |
|---|---------------------------------|----------------------------|--------------|-------------------|---------------|-----------------|
| Jews who identify strongly with Israel<br>People returning to Judaism |                                 |                            |              |                   |               |                 |
|   |                                 | Adult Bnai Mitzvah Class   |              |                   |               |                 |
|   |                                 | Hebrew for Adults          |              |                   |               |                 |
|   |                                 | Intro to Judaism           |              |                   |               |                 |
| People looking for creative approaches to Judaism                     |                                 | Intro to Reconstructionism |              |                   |               |                 |
|   |                                 | Adult Bnai Mitzvah Class   |              |                   |               |                 |
|   |                                 | Intro to Judaism           |              |                   |               |                 |
|   |                                 | Intro to Reconstructionism |              |                   |               |                 |

## **APPENDIX 4: FOCUS GROUP MATERIALS**

### **4A: FOCUS GROUP SUBCOMMITTEE TASK OUTLINE**

- Define which populations will be the targets for focus groups.
- Select participants appropriate to each focus group.
- Decide a date and location for each group.
- Select a facilitator for each group. Facilitators might play that role for several focus groups.
- Issue invitations and follow up with phone calls.
- Develop script for each focus group.
- Train facilitators. You might have local resources for this. Hold session; tape it; have person record comments.
- Produce a one to three page summary of each focus group to be studied by the long-range planning committee. Quotations are often useful as part of the summary.

### **4B: SAMPLE FOCUS GROUP INVITATION**

Dear [CONGREGANT],

Germantown Jewish Centre is undertaking a Long Range Planning Process. As part of that process, we are arranging Focus Groups to enable us to gather feedback from congregants about their experiences, ideas and visions for the Centre.

We would be most grateful if you would **participate in a Focus Group for [INSERT CONSTITUENCY GROUP HERE]**. This group is being held on [DATE] at [LOCATION] from [START TIME to END TIME].

Please email back to me as soon as possible to let me know if you are able to participate. **Your input is very important to us.**

Thank you!

Rachel

### **4C: FOCUS GROUP STRUCTURE AND SETTING**

- Focus Group Setting: It should be comfortable, friendly, inviting and there should be refreshments.
- Size: there should be 8-12 group members, so invite more so that enough people attend. Avoid including people who have authority over each other or are very good friends (if possible).
- Timing: Discussions should be framed to last between 1.5 and 2 hours. It is important to stay within time limits. Watch the time, and move things along. Note too what is being covered. If the responses are covering question 3 when responding to 1, you can spend less time on 3.
- Room Set-Up: Use a circular seating arrangement if possible.

#### **4D: FOCUS GROUP GROUND RULES**

- Everyone gets his or her chance in turn with each question.
- After everyone gets a turn, there will be a brief open conversation.
- There are no “right” or “wrong” answers.
- Speakers should use “I” statements: speak for yourself and not for others.
- The recorder(s) will not interact during the session. Their job is to capture faithfully what is said.
- Confidentiality: you may tell anyone what you said or what the facilitator said; you may report generally on the thrust of the meeting; you **must not** attribute what anyone else said to them.
- Anonymity: reporting will be in terms of general themes, quotations will be used to reinforce themes, but no attributions will be made, and identities will be masked.

#### **4E: INSTRUCTIONS FOR FACILITATORS**

##### **Facilitator Objectives:**

- Create a warm, open, non-threatening environment.
- Keep conversation on track.
- Elicit honest, deep responses from the group.

##### **Facilitator Tasks:**

- State the objectives of the meeting at the outset.
- Have everyone introduce themselves (and have a sign-up sheet). Encourage all to talk but, of course, allow someone to pass if she or he wants to.
- Gently but firmly control self-appointed experts and hostile members by listening and then telling them something like: “In the interest of time, we must move on to hear from the next person.” You can also interrupt and ask what others think or just ignore someone who is too pressing.
- Do not ***give your own opinions or ask leading questions.***
- Ask “**how**” and “**what**” questions not “**why**” questions
- Encourage story telling if you think it will provide richer material.
- Encourage people to give examples.
- Ask what others think.
- Ask people to expand on what they have said to get a more complete picture.
- Probe for clarity. Ask direct questions such as “Can you say more about that?”
- Pay attention to non-verbal cues and pick up on them. Say: “You seem puzzled about that. Can you say more?”

## **4F: INSTRUCTIONS FOR RECORDERS**

Recorders should not speak during the session. Their objective is to record faithful all information communicated in each group.

### **Recorder Tasks:**

- Bring a good tape-recorder that you have tried in advance (check the batteries).
- Bring a notebook and a couple of pens and/or a laptop computer.

### **Note Taking:**

- Take careful notes on what everyone says, trying to capture the essence.
- Do not editorialize.

### **Note Structure:**

- Record responses in order, with key statements under each question.
- Include significant quotations.

### **Qualitative:**

- Was there a decisive trend in the discussion?
- Were several different opinions represented?
- Whose opinions may NOT have been represented?
- Was there something unresolved or conflicting?
- Did anything else arise that calls for follow-up?
- **Tone** of the group—were participants forthcoming?
  - Was conversation halting, or animated, or engaged?
  - Did people seem to feel free to say what they felt?
- What **values**, if any, could you identify that emerged in the group?

### **Note Write-Up:**

- Right after the session, fill in your notes so that you clarify what doesn't make sense immediately.
- Immediately after you have 'fixed' your notes, draw up a list of any themes you seem to have heard and any other observations you made, including any surprises you experienced and why they struck you.
- If you are working in a team, go over your notes with your partner to make sure you have clarified your understandings and share themes, creating a single list but not eliminating anything at that point.
- In the next day or two, go over the tape recording, rectify any mistakes in your notes and while you listen, modify your initial list of themes.
- Get together with the facilitator and agree on themes. Flesh them out with quotations, and write up your report.
- Your duty is to capture the essence of the session you experienced but not to lose counter-themes or arguments or outliers (e.g. "Everyone in the focus group felt the early childhood program taught their children about the holidays in an engaging way

except for one person, who was worried that teaching about Hanukah glorified religious fanatics without any qualifications.”).

- In particular:
  - Note what themes or patterns emerge regarding each topic or question and how these illuminate the study’s broader questions.
  - Look for counter-themes as well as patterns and factors that might illuminate or explain them.
  - Note whether any of these patterns suggest the need for additional inquiry or refining the broader study questions.
  - Capture any stories that illustrate the themes or broader study questions.

#### **4G: FOCUS GROUP PRACTICE SESSION**

- Get two people to record and one to play facilitator first.
- Make sure you have a tape recorder.
- Have the facilitator ask one question.
- Stop and get the non-recorders into a group to discuss what they learned while the recorders do a mini-example of checking their data and conferring.
- Go over what the recorders experienced, and what the facilitator experienced.
- If time allows, do another round.

#### **Practice Questions:**

- What are your current impressions of our congregation?
- What kinds of congregational activities do you participate in?
- What other social, cultural or educational activities would you like to see our congregation provide for empty nesters?
- How can our congregation be more helpful to you and your family?

#### **4H: SAMPLE FOCUS GROUP QUESTIONS**

##### **Parents of Preschool-Aged Children**

*Note: If the answers run long, make sure to get to questions 1, 5 and 6.*

1. Please state your name, neighborhood, and the length of time you’ve been associated with our congregation.
2. Why did you pick your child’s preschool?
3. What are your current impressions of the congregation? [Facilitators: Be aware of exploring a range of opinions, positive and negative.]
4. How have you connected with other members of our congregation with preschoolers?
5. What kinds of activities would you like to have offered for families of preschool children?

6. Would you like to be doing adult Jewish learning that is parallel to the learning of your children?
7. How else can our congregation be of help to you or your family?

### **Parents of School-Aged Children**

*Note: If the answers run long, make sure to get to questions 1, 2, 4 and 7.*

1. Please state your name, neighborhood, the length of time you've been associated with our congregation, and where your child(ren) is (are) receiving their secular and Jewish educations.
2. What are your current impressions of our congregation? [Facilitators: Be aware of exploring a range of opinions, positive and negative.]
3. How have you connected with other members of our congregation with school-aged children?
4. In what ways has our congregation bridged the different needs of religious school and day school families?
5. What activities for school-aged children and their families would you like to have offered?
6. What, if any, Jewish learning would you like to be doing that is parallel to the learning of your children?
7. How else can our congregation be of help to you or your family?

### **Young Couples and Singles without Children**

*Note: If the answers run long, make sure to get to questions 1, 2, 4, and 5.*

1. Please state your name, neighborhood, the length of time you've been associated with our congregation, and what brought you to our congregation.
2. What are your current impressions of our congregation? [Facilitators: Be aware of exploring a range of opinions, positive and negative.]
3. How have you connected with other members of our congregation like yourselves?
4. What activities for people in your age group would you like our congregation to offer? [Facilitators: Explore social action, cultural and educational domains.]
5. How else can our congregation be of help to you or your family?

### **Adults without Live-at-Home Children**

1. Please state your name, neighborhood, the length of time you've been associated with our congregation, and what brought you to our congregation.
2. What are your current impressions of our congregation? [Facilitators: Be aware of exploring a range of opinions, positive and negative.]
3. How have you connected with other members of our congregation like yourselves?
4. Are there particular activities for people in your age group that you would like our congregation to offer? [Facilitators: Consider exploring social action, cultural and educational domains.]
5. How has your relationship with our congregation changed over time?
6. How else can our congregation be of help to you or your family?

### **Seniors**

1. Please state your name, neighborhood, the length of time you've been associated with our congregation, and what brought you to our congregation.
2. What are your current impressions of our congregation? [Facilitators: Be aware of exploring a range of opinions, positive and negative.]
3. How are you connected with other members of our congregation with like yourselves?
4. Are there particular activities for people in your age group that you would like our congregation to offer? [Facilitators: Consider exploring social action, cultural and educational domains.]
5. How has your relationship with our congregation changed over time?
6. How else can our congregation be of help to you or your family?

### **Jews & Non-Jews who are Partnered to Each Other**

1. Please state your name, neighborhood, the length of time you've been associated with our congregation, and what brought you to our congregation.
2. What are your current impressions of our congregation? [Facilitators: Be aware of exploring a range of opinions, positive and negative.]
3. In what ways have you felt welcomed?
4. In what ways have you connected with other members of our congregation?
5. Are there other social, cultural or educational activities that you would like to have our congregation offer?
6. How else can our congregation be of help to you or your family?

## **Gay Men and Lesbians**

1. Please state your name, neighborhood, the length of time you've been associated with our congregation, and what brought you to our congregation.
2. What are your current impressions of our congregation? [Facilitators: Be aware of exploring a range of opinions, positive and negative.]
3. In what ways have you felt welcomed?
4. In what ways have you felt connected to members of our congregation?
5. Are there social, cultural or educational activities that you would like our congregation to offer?
6. How else can our congregation be of help to you or your family?

## **APPENDIX 5: SAMPLE LONG-RANGE-PLANNING REPORT OUTLINE**

1. Executive Summary
2. Table of Contents
3. Introduction (where the method of preparing the plan is summarized)
4. Mission Statement
5. Demography, Congregational Sub-Groups and Marketing
6. Program
  - A. Program Objectives
  - B. Program Grid
  - C. Program Recommendations
7. Staffing Analysis and Recommendations
8. Volunteer Recruitment and Leadership Development
9. Financial implications of program and staff recommendations
10. Fundraising Implications
11. Changes Needed in Organizational Design
12. Building Usage or Construction
13. Areas of concern needing further study.
14. Summary of recommendations and five-year timeline for implementation

## **APPENDIX 6: SUGGESTED READING ON SYNAGOGUE MISSION AND PLANNING**

Bookman, Terry and William Kahn. *This House We Build: Lessons for Healthy Synagogues and the People Who Dwell There*. Herndon, VA: The Alban Institute: 2006

EnergizeInc! Susan Ellis, President. *Volunteer Resource Management Library*.  
<http://www.energizeinc.com/art.html>. Updated monthly.

*Cultivating the Future: Long Range Planning for Congregations*. New York, NY: URJ Press, 2006.

Glasser, Dale ed., *Temple Management Manual: To Learn and To Do*. New York, NY: URJ Press, 2005.

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