

**STAR SYNAGOGUE STUDIES #1**

**STAR**

**CONSULTING  
IN AMERICAN  
SYNAGOGUES:**

**A REPORT  
ON THE STATE  
OF THE FIELD**

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**FALL 2007**

**SYNAGOGUES: TRANSFORMATION AND RENEWAL**  
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## Purpose of Project

Synagogues are the most fundamental institutions for Jewish acculturation and identity formation in North America. Contemporary North American synagogues are facing unprecedented challenges that arise from shifts in demographics, rapid social and technological changes and the changing expectations of their members and potential members. For example, intermarriage is on the rise in all synagogues<sup>1</sup>. Age demographics are changing as well, and some denominations are facing a shift from a young population to an older one or vice-a-versa. As Cohen (2006) has stated, “The Conservative congregations... are the oldest by far. A third (34%) of Conservative family units is age 65 and over, far more than among their Orthodox (20%) or Reform (21%) counterparts.”<sup>2</sup> Another demographic shift is that most Jewish populations moved to the suburbs in the 1950s and 1960s, leaving urban areas empty of significant Jewish presence (with a few exceptions such as New York City). The congregations built in these older suburbs have shrinking religious schools and compete with new outer-ring, suburban synagogues. The lives of many Jewish families do not revolve around their synagogues as they once did. For them, other activities and forms of community have taken the place of the synagogue. Many of the techniques that are used by synagogues for communication, outreach, fundraising, program design and staff organization have been shifting rapidly as well. These changes, and others, have a deep impact on the life and rhythm of a synagogue. Successfully adapting to this changing environment is critical for synagogues, and many are reaching to outsiders for assistance and direction.<sup>3</sup>

Synagogues use consultants as one of the major resources for problem solving and adapting to the growing trends and changes mentioned above. Understanding the world of consultants should be important to anyone interested in Jewish institutions, yet little is known about synagogue consultants. There is little centralized information that identifies them, locates them, or categorizes how they do what they do. The level of their impact is not widely known. As a way to better understand the scope and nature of the field of synagogue consulting, Synagogues: Transformation and Renewal (STAR) has attempted to provide an introductory snapshot to the role and function of synagogue consultation with the idea that this might be used as the basis for future work on this growing field.

The project was designed with three objectives: (1) the creation of an annotated resource list of consultants that will be available to synagogues and Jewish communal organizations; (2) the publication of an overview of the state of synagogue consulting in the United States

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<sup>1</sup> Increasing proportions of mixed-married couples (5% in the Orthodox community, 12% in Conservative congregations, and 26% in Reform congregations, respectively). [http:// www.synagogue3000.org](http://www.synagogue3000.org) s3k. Steven M. Cohen.

<sup>2</sup> <http://www.synagogue3000.org/> s3k. Steven M Cohen.

<sup>3</sup> National Jewish Population Survey 2000-2001. *Strength, Challenge and Diversity in the American Jewish Population. A United Jewish Communities Report*. In Cooperation with the Mandell L. Berman Institute. North American Jewish Data Bank, September 2003.

based on empirical data on the activities of the field; (3) an analysis of the methods used for long-range planning in American synagogues and a set of data that considers their efficacy.

In order to frame the field of long-range consulting to synagogues, it is important to understand that it has two major components. Consultants to synagogues utilize secular theories from the fields of management, leadership, organizational change and process theory and combine these theories with information about synagogues and American Jewish life more broadly. Best-practice synagogue consulting in the United States, as this report will show, is comprised of the unique combination of consulting skills, a theoretical base, and a working knowledge of synagogues and American Jewish life. While by nature this field resides within these intersections, most consultants have fully developed skills in one or two of these areas. Building the field, we have learned through engaging in this research, will necessarily entail integrating these fields and areas of knowledge and expertise.

It is important to note that there are many kinds of synagogue consulting that take place, including but not limited to: short-term emergency consulting (e.g., for boundary crossing, communicative breakdowns or personnel issues), consulting for fundraising and related development initiatives, consulting for specific areas of congregational functioning like educational infrastructure development or religious life, and consulting in areas of program development. This report focuses on consulting in the area of long-range planning because it is the outgrowth of a larger study on long-range planning and consultation that is being conducted by STAR: Synagogues: Transformation and Renewal.

### **Background of STAR: Synagogues Transformation and Renewal**

As a thought-leader, STAR (Synagogues: Transformation and Renewal) helps denominational and non-denominational synagogues respond to 21<sup>st</sup> century challenges by respecting Jewish tradition and individual autonomy. STAR connects the American Jewish Community and the synagogue through congregational innovation and leadership development.<sup>4</sup>

This project is part of a broader undertaking called the Long-range Planning Project, with the goals of evaluating the impact of Synaplex<sup>5</sup> on synagogues that have engaged in the Synaplex program, exploring best practices for synagogues engaging in long-range planning processes and considering the state of synagogue consulting in the United States.

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<sup>4</sup> [www.starsynagogue.org](http://www.starsynagogue.org).

<sup>5</sup> Synaplex synagogues strive to offer programming that is relevant, inspirational and significant so that more people will want to come to synagogue on Shabbat and beyond. The underlying goal is to strengthen Jewish identity and build community.

[http://www.synaplex.org/index.php?option=com\\_content&task=view&id=8&Itemid=57](http://www.synaplex.org/index.php?option=com_content&task=view&id=8&Itemid=57)

## Methodology

This project consisted of interviews with over 50 consultants who focus at least a portion of their time on consulting for synagogues.<sup>6</sup> All interviews were conducted via phone or in person. Interviews were in-depth and individualized. They averaged 40 minutes in length. Interviews were conducted over a five-month period beginning in late July, 2006 and ending in mid-December 2006. Interviews were transcribed by the interviewer. As a result of the individualized nature of the conversations, there was not a great deal of correlation in questions that respondents answered similarly. An occurrence of 30% agreement on an answer is considered a high degree of concurrence for the purposes of this analysis.

An early list of interviewees was developed based on individuals' involvement in synagogue consulting. The majority of interviewees were then identified through a process of snowballing. The main goal of the initiative was to interact with and learn from the consultants themselves, thereby examining the status of synagogue consulting from the perspective of a representative sample of consultants. Since there is no comprehensive national listing of synagogue consultants, this list is necessarily incomplete. Additionally, without interviewing representatives from the congregations consulted, it was not possible to fully examine the effects that consultants have on synagogues.

## Questionnaire

The interviews were based on a uniform, 27-question questionnaire. The questionnaire consisted of three sections: **Educational and Professional Background, Client Base and Areas of Consulting**, and **Professional Development**. The first section examines consultants' areas of focus including: models, theories, methods and strategies they utilize in their work as synagogue consultants. The second section examines how many synagogues each consultant has served in his/her capacity as a consultant, how much time is spent working with a synagogue on a project, the movements the consultants work with, what they consider their greatest successes and challenges in their work as synagogue consultants as well as what they consider to be best practices in the field. The final section assesses the scope of the interviewees' professional networks, the resources they use to further their understanding of the field, and whether they engage in professional development. Please see Appendix A for the full questionnaire.

## Analysis

The first stage of analysis involved a detailed reading of all interviews in an effort to identify themes that cut across the entire data set. The second phase of analysis entailed the coding of interviews using the selected themes as *a priori* units of analysis. The last stage of analysis mined the interviews for outstanding quotations and outlying ideas that exemplify major categories of analysis. An in-depth discussion of findings based on the analysis of the data can be found in the next section.

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<sup>6</sup> All interviewees' names have been kept confidential within the narrative portion of this report.

## Findings

In order to assess the state of synagogue consulting in the United States, we must consider the broader context of consulting beyond the world of synagogues. The wide arena of consulting varies from management to marketing, fundraising, organizational planning and beyond.<sup>7</sup> Consulting occurs across all organizations, from such for-profit sectors as health-care management and human resources to a range of not-for-profit sectors, including fundraising, long-range planning and succession planning. Whereas consulting in the fields mentioned above has been well researched and has developed established educational and professional settings for research and training, synagogue consulting has no similar infrastructure. As a result, goals, methods, models and values vary greatly across the field. In this section, we explore the different focus areas of the various consultants who participated in the study.

## Reasons for Doing the Work

Before exploring consultants' practice, it is important to understand why individuals go into the field of synagogue consulting. While the reasons for engaging in this work varied considerably across consultants, many mentioned the importance of synagogue change work as a vehicle for impacting Jewish life. For example, many of the consultants spoke specifically about synagogues acting as gateways to the formation of Jewish identity. Some consultants, like the ones cited below, had deep knowledge and background in Jewish text study and ritual. One consultant stated, "[The] synagogue is a gateway. [I] deeply believe in its importance and viability." Similarly, another consultant voiced that "Synagogues are critical gateway organizations. They make Jews. [Synagogues] are the best [entryway] to make Jewish identity matter." Most consultants communicated that they believe that engaging in synagogue change work has a profound impact on Jewish life and identity in North America.

Some consultants communicated that they entered into congregational consulting simply because they saw the need while working in mainstream consulting organizations. The consultants' recognition of this need came from their personal involvement in synagogue life. They recognized that their organizational skills could contribute to the improvement of Jewish life.

## Areas of Consulting Focus

The areas in which consultants choose to focus their synagogue work varied greatly across respondents. However, there are some themes that are shared. It is clear that consultants value long-range planning and its effects on synagogue life. 31% of the consultants interviewed responded that most of their consulting focused on strategic or long-range planning. Many consultants believe that in order to affect change in a synagogue, rabbis and other leaders must buy into, and be directly involved in, the process; yet only 26% of the

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<sup>7</sup> <http://www.pwc.com/extweb/home.nsf/docidd91490a50073c84f852570130064c1b1>

consultants reported that they highly valued working with rabbis, presidents and other key board members, suggesting the challenge consultants have in constructively engaging key synagogue leadership in change processes .

Rabbis' relationships with lay leaders can be fraught with tension. Many consultants focus their work on one-on-one coaching for rabbis. This work involves helping rabbis to plan and execute important transitions and to make decisions that affect their personal identity and the identity of the congregation that they serve. When rabbis and presidents are unable to communicate and collaborate effectively, synagogues can be quite dysfunctional; therefore, many consultants focus their work on helping the two to collaborate, communicate and understand each other. At times of crisis, when boundaries are crossed and roles are confused, some consultants work on crisis intervention. This usually relates specifically to the roles of the rabbi and other leaders in the congregation.

Leadership development was a frequent topic of conversation among consultants in this study. Yet there was no common definition among them. Given that 24% of the consultants answered that they focus their expertise in this area, it is important to explore what this means. Consultants spoke of leadership development in a variety of contexts and situations including volunteer training, president-rabbi relations, structure of the board and establishment of effective governance and processes.

Given the importance of developing and sustaining effective and efficient boards of directors, it is not surprising to note that 20% of the consultants responded that they focus specifically on governance and board development. Once a board is functioning, it is important for committees to operate so that board policies and procedures are effective as well. In recognition of this, some consultants choose to focus their time and effort on helping synagogues work with committees to execute plans for capital campaigns, marketing, education and programming.

### **Professional Background and Training**

Closely linked to the foci of consultants' work with synagogues is the training they have received through formal education, experience and/or mentorship. In this section, we explore consultants' professional backgrounds as they relate to the current focus of their synagogue work. There is little uniformity within synagogue consultants' professional backgrounds. Consultants have taken many paths to reach their current status as professional consultants. Many of the consultants are ordained rabbis, some are trained in business and have earned MBAs, while others have a background in organizational development and have earned a PhD in planning. Still others hold master's degrees in social work or education. The diversity in training of synagogue consultants speaks to the range in skills and specialization of these consultants. 24% of the consultants interviewed are ordained rabbis; 18% have earned a PhD in related fields such as organizational dynamics or planning; 25% have master's degrees in Judaic studies; 7% earned master's degrees in social work, 5% have an MBA and 5% have degrees in education. Those consultants who have been ordained as rabbis have a deep knowledge of Judaism and Jewish life. However, few are trained specifically in organizational planning. Those who have received their training either through MBA programs or through business consulting firms have a deep knowledge of effective organizational models. These models however, are not specific to the nuances of

synagogue life. Furthermore, having an MBA or another secular degree does not provide an understanding of the complexity of Jewish identity and Jewish life that plays an important role in consulting for synagogue change.

### **Importance of Denominations**

In addition to receiving knowledge and support from educational institutions, some consultants receive support, training and employment from their affiliation to various movements. Several of the most important networks in the synagogue world are the formally organized denominations. A large proportion of the consultants in this study are tied to the Reform movement either through ordination or employment. 25% of the consultants in the sample are affiliated with the Reform movement whereas 12% with the Reconstructionist movement, 7% with the Conservative movement, and 2% with the Orthodox movement. 30% are unaffiliated to any movement. These percentages do not correlate with the size of the movements, the size of synagogues, or synagogue budgets. Notably, 5% of the sampled pool of consultants is linked to Jewish Federation organizations that support their work as consultants. These consultants are not tied to any one movement but maintain formal ties to the Jewish institutional world through their respective Federations. The preponderance of ties to the Reform movement may be due to the fact that the Reform movement has a long-established Department of Congregational Affairs that assists synagogues by sending out its own consultants to Reform congregations and by making resources about organizational change readily available to anyone within the Reform movement who needs them. URJ regional directors receive training to strengthen their consulting skills. Additionally, the Reform movement's seminary, Hebrew Union College-Jewish Institute of Religion, offers coursework and certification in the area of congregational planning. The Reconstructionist movement, however small, has allocated efforts towards training synagogue leaders in organizational planning. Additionally, the Reconstructionist Rabbinical College offers coursework in organizational and group dynamics. The Conservative movement does have an office of congregational affairs, but it is staffed by a single person and has few resources to allocate to the large Conservative synagogue constituency. There was only one consultant interviewed who is affiliated with the Orthodox movement. It seems that there are minimal resources in this area in most Orthodox yeshivot and at the Orthodox synagogue organizations (Union of Orthodox Jewish Congregations of America and Young Israel). Though, Yeshivat Chovevei Torah has a well-developed curriculum teaching organizational dynamics to congregational rabbis.

### **Models and Theories Fundamental to Consulting**

The consultants interviewed seemed hesitant to answer the question “What models and theories do you use in your consulting on long-range planning?” Many consultants eventually responded to this question by describing the methods they use in their consulting. There appeared to be confusion between what is meant by methods and by models. This confusion is significant because it demonstrates that there is no cohesive theory or set of concepts that guide the field of synagogue consulting. The range in training mentioned in the section above also leads to multiplicity of theories in the field.

After some clarification of the question, consultants shared a list of theorists and models that inspire them and guide their work. Models that consultants use in their work fall into the following broad categories: **Management, Leadership, Systems Theory, and Change and Transition Work**. These categories were not usually mentioned as specific categories by the interviewees. The categories were formulated in order to effectively analyze the data. The data show great range and variation. There is little cohesion in the definition of models and sources of inspiration. Still, in order to understand this field, it is important to create categories, however imprecise they may be. The most prevalent theorist cited was Peter Senge; accordingly the most prevalent model cited was Social Systems Theory. 25% of consultants cited Peter Senge or Systems Theory (some consultants did not specify Peter Senge as the leader in the systems theory movement) as their primary model for engaging synagogues in a change process. 18% of consultants interviewed expressed that Management and Leadership theorists, mainly John Kotter and John Carver, inspire and root their work as synagogue consultants. Lastly, 15% cited Peter Drucker and William Bridges, authors and theorists who write about management, change and transition, as fundamental to their work. It is important to note, as mentioned earlier, that there was some confusion regarding this question. 25% cited *no models* as essential to their work as consultants. Additionally, there were many theorists and models that did not fall into the categories listed above. Interviewees cited a total of 37 theories that they view as vital to their work. This supports the assertion made earlier that there is no uniformity in this field. Please see Appendix B for the full list of themes cited.

### **Methods Essential to Consultants' Work**

While consultants struggled to offer names of models that are fundamental to the work of synagogue consulting, they spoke with ease and precision when asked what methods they use in their work with synagogues. What is clear in this section is that in spite of the lack of uniformity among consultants' descriptions of their theories and training, their practice shows great cohesion and commonality.

An essential aspect of a consultant's method is the way that consultants define their roles. Most consultants believe that the role of a synagogue consultant, as one participant noted, "is to facilitate and bring in the voice of the congregation." Others said that a "consultant's role is behind the scenes [as] a coach and enabler." The role of a consultant, as quite a few interviewees mentioned, is "not to do, but to support congregations to be reflective and self-renewing."

Consultants often spoke about the importance of constituent "buy-in." Buy-in is a three-tiered process as most consultants describe it. First, a consultant must develop a working understanding with the rabbi. Second, the consultant must work with the board to arrive at an agreement about process. Finally, a consultant must work with other key lay leaders and opinion leaders to ensure their participation and acceptance of that process. A great number of consultants believe that when they enter the synagogue planning process, there has "to be significant buy-in and ownership from lay people." According to some interviewees, if buy-in is not established early on in the process, then it can become extremely difficult for an "organization to implement [significant] change." Interviewees maintained that it is especially important to engage the rabbi in the process. "If a rabbi isn't committed," commented one consultant about a rabbi's engagement with a planning process, "[then] you

can forget it.” Many consultants said that after achieving significant, initial buy-in it is crucial to “involve people in the process.” This process, as one consultant stated, must “begin with diagnosis.” Diagnosis must occur, according to this participant, so that the consultant and community can come to “understand [the] sources of the issue.” Furthermore, a great number of interviewees agreed that this system “allow[s] people to determine what [it] is they need to succeed within the system they already have.” Consultants help synagogues understand what resources already exist in their governance, membership, physical structure and culture so that they can better assess how to proceed with plans for change.

Once a consultant has received sufficient buy-in from the rabbi, board and other leaders, the consultant must begin to assess the congregations internal narrative and compare it to the congregation’s functioning and external realities. This process has proved to be extremely useful and important to most of the consultants interviewed. Gathering data about the synagogue is not only useful as a planning tool, but also helps build community and gain support from the varied constituencies. Specifically, many consultants spoke of the need to “help [the congregants] look at the underlying unconscious assumptions in the culture” in the synagogue. A tool that most consultants cite as valuable in assessing the current state of the synagogue is called a SWOT analysis (Strengths, Weaknesses, Opportunities and Threats Analysis). This process is essential for synagogues according to one interviewee, because it helps them get to “know [their] past and know where [they] are.” Once a synagogue’s leaders are aware of the organization’s past and present, effective planning can occur. The planning that grows out of a SWOT analysis is considered useful by both consultants and the synagogues’ leaders because, as one states, the SWOT analysis is based on “a perspective that mirrors the model of the organization.” Using the synagogue leaders’ understanding of its situation as a planning tool is a method, according to some consultants, that “explicates the implicit.”

Another important element in the planning process, as one consultant stated, is to “develop a vision or plan together to work towards.” In developing this vision, one consultant’s process is to explore the response to the expression: “what [are] [your] dreams and associated values with those dreams?” If congregations are able to clearly express these dreams, consultants can assist congregations to find a path toward fulfilling them.

Many consultants believe that it is crucial to engage the community they are serving in all aspects of the process, such as working on a SWOT analysis or developing a synagogue’s vision. One consultant spoke of using a “participant action model, which involved joint collaboration,” as a crucial component of the planning process. The participant action model helps congregants “get excited about change when they are involved in the change process.” Another means to engage congregants or congregational leaders in the change process is, according to another consultant, to “emphasize peer-to-peer outreach” thus engaging larger numbers of participants in the long-range planning process. A large portion of the consultants believe that engaging congregational leaders and congregants in the planning process requires that “every person [engaged in the process] has to do something.” When all parties are engaged in the planning process, they can voice their goals, expectations and concerns, necessary steps in seeking common ground.

Another approach cited is to infuse Jewish texts and values into the planning process. One consultant spoke passionately about the importance of “infusing everything within a Jewish context” when working with a congregation through their change process. Engaging

congregants in Jewish text study, according to one consultant, “builds Jewish leadership.” Finally, one consultant claimed that in order for the plan to be effective within the context of a synagogue, it is crucial to “take what we understand as planning concepts and infuse them with Jewish concepts.” Consultants who use Jewish texts within their consulting practice spoke about it with great enthusiasm. For example, one consultant averred “using Jewish texts for values is very useful and wonderful!” Some of the consultants however, noted that they do not have extensive knowledge of pertinent Jewish texts and therefore find it very difficult to infuse Jewish texts into their work. As one interviewee stated, there is “a lack of synthesis between consultants and Jewish text.” This speaks to the potential need in the congregational consulting field to educate consultants about Jewish texts and values relevant to change processes and long-range planning. According to one consultant, “studying Jewish texts is an opportunity for Jewish growth and education” and synagogue change processes are potentially a path to Jewish growth and education.

### **Consulting Cycle**

Long-range planning is intended to help synagogues examine and assess their practices systematically, thoughtfully and thoroughly. Many synagogues, perhaps not realizing the potential benefit of a long-range planning process or because of lack of exposure to resources, do not include a consultant in their budgeting process. Often, once a synagogue decides to make the commitment to hiring a consultant, there are disagreements about the amount of time that this process should take. One consultant suggested that “synagogues really need to commit two years to the process. They can make program[matic] changes in a shorter period, but they will not transform in a way that will help them meet the challenges of the future.” According to another consultant, many synagogues, “only want you for [a] finite amount of time to deal with a particular problem.” Some consultants concur with that approach. A large percentage of consultants argued that synagogues’ issues can be dealt with over a weekend. Regarding the time spent working with synagogues on long-range planning, one consultant reported that it took no more time than “facilitating a board retreat.”

It is clear that some consultants focus all of their work on weekend retreats while others spend two to three years with each congregation and develop a fully fleshed out long-range plan. The majority of consultants interviewed responded that the amount of time they spend with a congregation depends on the goal of the process; for some projects they simply need a day or a weekend, while for others they need six months to a year or more. The unavailability of funding is a major determinant of the nature of the consultant’s commitment. Few consultants defined their work according to the time they are willing to spend with a synagogue. Again, depending on the synagogue’s goals, needs and resources, consultants created time parameters that worked for the synagogues’ budgets while ensuring that there would be enough time to effectively complete the process. Appendix C contains a sample long-range-planning process.

## Finances

When asked “What is your fee schedule?” many consultants were reluctant to share this information. Understandably, there seemed to be hesitation across the interviewees to share their fee ranges for a report that was going to be published and accessible to the public. Only 5% of the interviewees answered the question. The data set is not large enough to be representative.

## Best Practices

Few consultants were able to identify with the phrase “best practices” within the context of synagogue consulting. Many were unable to identify organizations or individuals in the field that can be seen as models for effective synagogue change work.

Those who did identify best practices in the field identified the following organizations: **Experiment in Congregational Education (ECE), Synagogue 3000 and the Alban Institute.** ECE is an initiative of the Education School at Hebrew Union College-Jewish Institute of Religion in Los Angeles. The goal of ECE is to guide “congregations to revitalize themselves by bringing Jewish learning to every aspect of congregational life.”<sup>8</sup> Synagogue 3000 is, “a catalyst for excellence, empowering congregations and communities to create synagogues that are sacred and vital centers of Jewish life. We seek to make synagogues compelling moral and spiritual centers – sacred communities – for the twenty-first century.”<sup>9</sup> The Alban Institute is an “ecumenical, interfaith organization founded in 1974, which supports congregations through book publishing, educational seminars, consulting services, and research.”<sup>10</sup> STAR, while committed to congregational innovation and leadership development, offers consultant services, but its resources model best practices in several areas of concern to consultants.

The small number of organizations cited and the fact that they were only mentioned by a few of the consultants indicates a lack of role models for this work. This dearth limits the ability of consultants to improve their practice and reflects the difficulty that synagogue consultants have in sharing their work with others. Having a venue within which to share practice within a field can be immensely useful for practitioners. Many fields have professional associations that opt to hold professional development seminars and conferences so that their professionals can continually develop new skills. If a professional network that reflected on best practices for synagogue consulting were in place, consultants would also be able to network with colleagues, learn from their techniques, and reflect on their current practice. This will be discussed further in the last section of this report.

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<sup>8</sup> See [www.eceonline.org](http://www.eceonline.org) for a fuller description of this program.

<sup>9</sup> See [www.synagogue3000.org](http://www.synagogue3000.org) for a fuller description of this program.

<sup>10</sup> See [www.alban.org](http://www.alban.org) for a fuller description of this program.

There is a clear need for the synagogue consulting field to broaden and include more organizations whose theories and processes can act as best practices for the field. Utilizing “best practices” offers consultants an opportunity to reflect on their theory and practice as it relates to others in the field. Additionally, publicizing “best practices” can offer synagogues an opportunity to understand what practices are considered most effective and reliable in the field. Synagogue leaders rarely have strong backgrounds regarding congregational long-range planning and change processes. Making synagogue transformation processes accessible to synagogues will also help create a common language between synagogue leaders and consultants.

### **Successful Practices**

Given the diversity of thought and theories in this field, it is not surprising that the consultants surveyed in this project voiced a wide range of perspectives on what successful implementation of a change process looks like. Defining success is a subjective matter, dependent on the consultants’ relationships with congregations, self-evaluation processes and, ultimately, ability to listen to their congregants’ feedback regarding their performance. Additionally, when evaluating the success of a long-range-planning process it is difficult to ascertain the effectiveness of the consultants’ presence and work with the synagogue without returning to that same synagogue several years later to note any significant changes stemming from the consultant’s activity. In light of that, many consultants found it difficult to answer the question, “What do you consider the areas in which you have had your greatest successes as a consultant to synagogues?”

One consultant responded that if there is a “strong commitment and buy-in from the board” for a change process, that such commitment alone should be considered a success. This speaks to the fact that many synagogues’ leaders do not see the value in planning processes or face significant challenges to their leadership so that they are unable to reach agreement as a team about whether they should engage in a long-range-planning process.

Other consultants looked beyond generating board commitment to define the success of their work. A significant number of consultants said that the planning process must spiral throughout the synagogue and not be confined to one particular area or committee. For example, one consultant responded that success can be found in “structural change in...leadership style and culture of synagogue.” Several consultants look at the whole synagogue system to understand whether success has been attained. One consultant noted that when they (the consultants) “have impacted the way they (the synagogue) operate, [and] understand their role in congregants’ lives,” success has been achieved.

A significant number of consultants define their success as the ability of a synagogue to build a vision based on its values and culture and to implement a plan to fulfill that vision. According to another consultant, when a planning process is successful, synagogue leaders are able to view the institution and the problem they are solving “with fresh eyes. [They come] away with renewed vision and a strategy for fulfilling that vision.” One consultant noted that the “greatest success [occurs when a synagogue] shifts from being lost to fighting, conflict, and tension,” to creating a “consensus on vision,” after “they’ve examined [their] goals.” This is significant because it illustrates part of the importance of a synagogue going

through a visioning process. It also speaks to the value that consultants place on the visioning process and the breadth of its potential effect on changing the synagogue as a whole.

Another group of consultants defines success by the areas of the synagogue that they see as portals to the whole system, such as governance and leadership. One consultant noted that “If I can make synagogue governance more effective, they can make their institutions more attractive. They can be a draw instead of a drain.” Another consultant who values leadership and consults around issues of leadership stated that success is “enabling change in leadership.” Similarly, another consultant noted that “helping synagogue management teams form and pursue change” is a crucial indicator of success. This speaks to the importance of leadership in enabling change within a synagogue. Effective leaders and governance structures can affect a synagogue’s culture and willingness to change.

Yet another group of consultants define success as it pertains to synagogues’ willingness to adapt their culture and policies to current best practices in the field. A synagogue that is “alive and current with the time,” according to several consultants, is a “successful” congregation. One consultant defined success in a related way as the ability to “turn around congregations that were dormant and make them dynamic.” Another consultant suggested that “congregations that realize that they can’t remain in the past and have to start rethinking synagogue life” are showing signs of success. This speaks to the necessity that synagogue leaders understand that a synagogue’s culture and policies must evolve. Consultants’ dedication to helping synagogues realize the importance of pairing their policies to current trends in the field demonstrates that it is essential for consultants to remain up to date on current processes and models across the synagogue change movement.

A large number of consultants also spoke to the importance of engaging congregants in the change process. These consultants viewed this engagement as an indicator of success. One consultant noted that a crucial gauge of success for him is whether “more people are feeling good about feeling engaged” in their synagogue. This reflects the belief that the more synagogue leaders and members are engaged in the change process, the more the change will spiral out to all parts of the synagogue.

Some consultants referred to the systems theory model to articulate what success should look like after a planning process is complete: “Success can be defined when a consultant is able to help them [synagogue leaders] see the synagogue as a system of interdependent parts. The whole cannot be successful unless the parts are working interdependently, and the parts won’t work interdependently unless the relationship among the parts is strong.” Consultants’ adherence to systems theory as a guiding principle for their work results in emphasizing the importance of synagogue leaders working with all committees to ensure that the vision and plan are being implemented in all parts of this complex system. The synagogue’s leaders, including committee and board members, administrative staff and the rabbi, must communicate regularly to ensure that all parts of the synagogue have a unified vision that is implemented collaboratively and systematically.

Some consultants defined success in terms of measurability. If the “goals [of the project] have been met,” then, according to one consultant, the project has been successful. Many consultants rely on their reputations in the field as an indicator of success. Synagogue leaders often communicate with each other and use each other as resources to get information about

policies and procedures. If a synagogue president is looking for a consultant for a long-range plan, the president will ask other presidents for the names of consultants who have been effective.

### **Challenges of the Work**

The demographic shifts that North American synagogues face can be trying for synagogue leaders. However, synagogue consultants spoke mostly about the politics, governance and finances of synagogues as challenges to their work. Below consultants address some challenges within synagogue life that make their jobs difficult.<sup>11</sup>

As many consultants stated, synagogues are “highly political organizations.” Every policy decision that is made is politically charged and requires a deliberative process. This may mean that when a consultant enters a synagogue, the leaders have not come to consensus about the issues regarding the way the synagogue functions. Furthermore, when a synagogue consultant enters a synagogue, it is often the case that synagogue leaders have not yet agreed on the change process or even agreed on hiring a consultant for the synagogue. Consultants communicated that they often find themselves “operating in dissonance from membership” or even some of the leaders of their client synagogues. This is due to the complex relationships that are inherent in synagogues. One consultant noted that “leaders are ill trained in terms of having effective conversations.” Consultants must facilitate a change process in a setting where leaders have not had basic training in how to run a meeting or facilitate effective conversations. Not all consultants have the training to do that.

For any institution the realization that there are many traditions or policies that must be changed can be quite jarring. Yet any planning process requires an openness to change. One consultant noted that “strategic planning is about change management. Because of the unique characteristics of most congregations and the organizational culture of synagogues, change management is big.” In a synagogue, change is required of all members and leaders. One consultant spoke of “volunteer turnover and disgruntled congregants that don’t want to see change.” Additionally, many consultants noted that they work with many “rabbis who don’t want to change,” making the work of planning and implementation difficult.

Most consultants stated that when they begin work with a synagogue, leaders and congregants often “want a quick change.” Additionally, the issue of “process versus product can be frustrating to synagogues” as it takes considerable thought and a lengthy process to attain the final product in long-range planning. One consultant noted that “dealing with volunteers who do not want to do process” can substantially hinder the entire planning process for the synagogue.

Lastly, as noted earlier, there are often issues of resources and resource allocation. Many congregations “don’t want to spend money” on a planning process. If synagogues do find the money, they are often hesitant to make a long-term commitment, making success more difficult to attain. This has implications for how synagogues view their resource allocation

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<sup>11</sup> Teutsch, David. (2003). “Rabbis and Synagogues: family, business or community members” in The Reconstructionist. Volume 67, Number 3, Spring 2003.

for planning. Synagogue leaders need to understand that for congregations to be successful, they need to commit financial and human resources to a continuous process of planning and adaptation. This issue stands outside the scope of this report but has direct implications for synagogue consultants and the kinds of work they do.

## **Summary and Next Steps**

Synagogue consultants currently use many effective and inspiring techniques in this field. Consultants also implement numerous useful methods and models of the change process that benefit synagogue life. They sometimes provide rabbis expert coaching that helps them to communicate effectively with lay leaders and strengthen their involvement in direction-setting and fundraising. Consultants provide leadership training for lay leaders that assists them in the building of effective and efficient synagogues. While there is much to be excited about, the field is fraught with challenges. These challenges can be viewed as opportunities for the field. Findings presented in this section of the report speak to these challenges and to the possibilities that they generate. It is important to note that the critique implied in this report is of the field in general, and not of any of the individuals interviewed for this report or involved in the field.

One of the core challenges of the synagogue consulting field is that it is quite simply not a defined and recognized field as such. The diversity of backgrounds and philosophies of synagogue consultants points to inconsistencies and gaps in the necessary level of consultant training and professional development. Many consultants are insufficiently trained for synagogue change processes. As noted in the findings section, consultants are typically trained either in the business field or as rabbinic leaders. Neither background provides the full training needed for the field of synagogue consulting. Furthermore, there is little training or professional development designed to educate synagogue consultants about the growing field and increasingly complex skills needed to help synagogues effectively change their culture, governance and rabbi-lay leader relationships. Congregations selecting consultants do not typically have a sense of their training, skills or their limitations. Hiring consultants can therefore happen haphazardly without sufficient consideration of the consultant's areas of expertise, level of experience or effectiveness.

For any field to thrive, professionals entering it must be properly trained and must engage in ongoing professional development to reinforce lessons learned during training and to acquire new information and approaches. Consultants need access to opportunities to develop and refine shared values, methods and models that meet the fields' needs. The findings in this report clearly point to the fact that few consultants have had opportunities to cultivate a reservoir of knowledge regarding theorists and models of practice that can inspire and guide them sufficiently in their synagogue consulting work. This finding leads to the recognition of another dearth: the literature written by and for synagogue consultants as sources of guidance is limited. With no common sources to draw from, synagogue consultants report that they draw their ideas from a wide variety of theories and models, many of them far afield from synagogue life. This leads to inconsistency – and sometimes inadequacy – in the methods and models consultants use in their work with synagogues. Due to inconsistency in definition and execution in the field, there has been little replication of successful models of synagogue change processes. Inconsistency in definition and execution, coupled with

insufficient information, make it challenging for congregations to select their consultants on the basis of training and skills.

In addition to a lack of resources specific to synagogue consultation, there are few structured opportunities for communication and networking between synagogue consultants. Most of the consultants interviewed were curious about who else was involved in the research; they wanted to understand who else is identified as a member of the synagogue consulting field. Very few of them communicate with any other identified synagogue consultants. One exception is the group of consultants who are employed by federations and their agencies, who have been able to set up phone conferences and schedule annual meetings to discuss best practices and reflect on the successes and challenges of their work. Additionally, employees of the Reform movement have resources available to them through the Union for Reform Judaism on issues related to synagogue consulting. Consultants who are not affiliated with the organizations or networks listed above reported that they do not have any structured opportunities to meet, reflect or plan with other synagogue consultants. Without an organized network, consultants do not have opportunities to share knowledge, theories or approaches to their practice. Consultants need exposure to other modalities and models within the synagogue consulting field.

Consultants need to have access to structured opportunities to continue to educate themselves in the methods and models used in this field. In order for professional development to be available to synagogue consultants, an organization is needed that is specifically devoted to educating and training synagogue consultants, one which understands the intersection between secular models and contemporary synagogue challenges. A professional organization would provide training and skills development as well as articulate standards to which all members of the organization must adhere. This professional organization can articulate methods, models and theories that act as professional benchmarks for the field. Consultants reported that they would like to participate in professional development seminars and experiences, conferences and other professional opportunities that will help both them as consultants and the field of synagogue consulting more broadly to grow and develop the capacity to reach and affect thousands of synagogues and Jewish institutions. What is needed is a professional organization that can provide structured professional development and certification and that can also offer such online resources as listserves and a central database for consultants engaging in congregational work. For example, a listserv can host discussions about successful models, challenges across the field and best practices. A central database can collect academic articles and other related written resources on the theory and practice of synagogue consulting and make them available to synagogue consultants.<sup>12</sup>

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<sup>12</sup>An interesting model that already exists is available through the Experiment in Educational Congregations (ECE). ECE has an online resource center available to synagogues that participate in their long-range planning efforts. The website is divided into three different categories: Organizational Side of Synagogues, Organizational Development and Change, and Jewish Education in the Congregation. This resource is available to congregations although a similar website could be replicated for consultants and congregational leaders as well. Another valuable website model is STAR: Synagogue Transformation and Renewal, [www.starsynagogue.org](http://www.starsynagogue.org)

As mentioned in the findings, there are Jewish seminars that offer coursework in congregational leadership, administration, group process and planning. And there are opportunities to receive a graduate degree in organizational dynamics and planning at dozens of universities. However, there is no graduate program that specializes in organizational dynamics, consulting and planning specific to synagogues. Such a degree program that would train for the field of synagogue consulting could be based at a seminary or a university. Such a graduate-level program could provide certification in synagogue consulting and planning, which would help to stabilize the field. Individual funders, foundations and Jewish organizations interested in the synagogue consulting field should help create a professional association and explore the possibility of developing a graduate program.

### **Movement Influence**

The Reform movement continues to show great commitment to synagogue consulting and planning. An office in the Union for Reform Judaism focuses on synagogue planning and administration and offers resources and advice within the Reform movement. HUC-JIR offers significant coursework in such areas as organizational planning and the role of the rabbi. The Reconstructionist movement, through the Jewish Reconstructionist Federation and the Reconstructionist Rabbinical College, also offers coursework and resources for lay leaders and rabbinical students to learn about theories and practice involved in synagogue administration, group process and planning. There are consultants that have grown out of both of these movements. Clearly, there are differences emerging across movements and their approach to synagogue consulting and planning. There is little communication between these movements, however, further decentralizing the field of synagogue consulting.

### **Finding Consultants**

Lay leaders of synagogues who are looking to hire a consultant to work on a long-range plan, leadership development or a short-term emergency find consultants through regional directors of their specific movements, their local federations' listserves and word of mouth. Synagogues often have no criteria for choosing a consultant that are specifically appropriate for their needs. Lay leaders rely on people within their own movements, federations or communities. It is important to give synagogues enough information and resources so that they can thoughtfully choose a consultant who meets their needs. Maintaining a national listing of synagogue consultants would be a valuable step in that direction.

### **Budgeting**

As noted in the findings, few synagogues include a line item for consultants or for strategic planning. As a result, when offered a contract, many consultants must tailor their long-range planning methods and models to the budget allocated. In other words, consultants could effectively work with each synagogue for six months to one or more years, but few synagogues have the financial resources to compensate a consultant for that amount of time. Consultants therefore often conform to what the congregation will pay for, which is usually one-day retreats or two-hour sessions. As a result, consultant methods-in-use seem to correlate most directly to funding. These methodologies are not necessarily what will help

synagogues or consultants to be effective in the long term. The movements could develop sample consultant plans and templates with budget guidelines. These could be made available to congregations so that they know how much to allocate in their budgets for long-range consulting of various durations and scopes based on what they seek to achieve.

### **Consultant Evaluation**

There is no standardized evaluation process that assesses whether the methods and models used by synagogue consultants are effective and efficient, and whether they meet the goals of the synagogue. There is no testing for quality results in this field. Consultants need to evaluate their results, synagogues need to evaluate their own work and synagogues and consultants need to evaluate each others' work. Thorough evaluative processes are needed for the advancement of the synagogue consulting field.

### **Concluding Thoughts**

It is clear that there is a substantial need for planning processes to occur in synagogues that are aided by well educated and trained consultants. These consultants need to be supported by a professional organization that sets standards, provides resources and gives feedback on their work as synagogue consultants. This means that a professional organization for synagogue consultants needs a staff and other resources. Without these resources, the field will continue to be decentralized and chaotic.

As many consultants noted, synagogues are gateways for Jews into Jewish life. Synagogue consultants, if offered the right kinds of support, can work to ensure that synagogues continue to thrive, respond effectively to changing demographics and technologies, and meet the needs of both Jews and the Jewish community.

## **APPENDIX A: Survey of Congregational Consultants**

### **Survey of Congregational Consultants**

#### **STAR (Synagogues: Transformation and Renewal), August, 2006**

Hello. STAR is interested in creating a data base of individuals and organizations that provide consulting around strategic or long-range planning to synagogues. The results of this survey will be used in three important ways: (1) to create an annotated resource list of consultants that will be available to synagogues; (2) to produce a report that will examine the state of synagogue consulting in the United States; (3) to provide perspective on the methods used for long-range planning in American synagogues and collect data that will allow us to consider their effectiveness. Many thanks in advance for your time.

#### **Contact Information**

Name:

Professional Title:

Institutional Affiliations:

Address:

Phone(s):

E-mail address:

Fax:

Preferred mode of contact:

#### **II. Education and Professional Background**

1. Please list all degrees/certificates earned, including institutions and concentration(s).
2. For how many years have you been working as a consultant?
3. In which areas do you do consulting? How much of a focus is long-range/strategic planning?
4. What models, theories or approaches do you use in your consulting on long-range/strategic planning? In what ways do these models inform your work with synagogues?
5. Please describe your methods/strategies in your long-range/strategic planning work with synagogues.
6. Were/are you trained or supervised by others in this field? If so, by whom and in what area(s)? How often?

7. Do you feel that you have knowledge about Judaism/Jewish life? From where does this knowledge come (i.e., formal training and/or professional development)?

## **II. Client-Base and Areas of Consulting**

8. How many years have you been in the field of consulting? To date, with how many synagogues have you served as a paid consultant?

9. Please describe your specific approach to your synagogue consultation work.

10. What is your consulting cycle like in terms of time parameters?

11. What percentage of your clientele is synagogues or other Jewish organizations, not-for-profits, corporations? Can you list some of them and the kinds of consulting services you provide to them?

12. With which movements/denominations have you worked? Are you employed by or affiliated with one of these movements?

13. What have been the sizes of the congregations with which you have worked?

14. What is your fee schedule like (a range is fine)?

15. What do you consider the areas in which you have had your greatest successes as a consultant to synagogues?

16. What do you consider the areas in which you have had your greatest challenges as a consultant to synagogues? Can you talk about how you think about these challenges?

17. What do you see as “best practices” in your field? Ask for specifics/examples.

18. What is most interesting/compelling to you in your work with synagogues?

19. How do you characterize your role(s) as a consultant to synagogues?

20. Have there been times when external circumstances have prevented you from accomplishing your goals and what were they?

## **III. Professional Development**

21. What resources do you draw upon in your work with synagogues? How do you cultivate those resources?

22. To what professional associations do you belong? How do these support your work with synagogues?

23. In what kinds of professional collaborations are you involved?

24. In what kinds of professional development activities do you engage?

25. How do you cultivate effective models and strategies for your work with synagogues?

26. How do you remain current in understanding demographic and sociological trends in American Jewish life?

27. Is there anything else you would like to share about your experiences or perspectives as a consultant to synagogues?

### **Additional Information**

Please attach all professional materials (e.g., professional biography, PR materials).

Can you share information about any other consultants doing work with synagogues in North America (names, contact information)?

Please list the names of other synagogue consultants of whom you are aware. Have you collaborated with any of these consultants/organizations? In which areas?

### **APPENDIX B: Theories and Models Listed by Consultants**

Theorists- Listed in alphabetical order by last name:

Isa Aaron

Chris Argyris

Brian Barry

Richard Beckhart

William Bridges

John Bryson

John Carter

Jim Cohn

Jim Collins

Peter Drucker

Ed Friedman

Michael Fullan

Howard Gardner

Daniel Goleman

Ron Heifetz  
John Kotter  
John McKnight  
Tom Peters  
Carl Rogers  
Edgar Schein  
Donald Schon  
Peter Senge  
Thomas Skillman  
William Ury

Models- Listed in alphabetical order:

Action Research  
Appreciative Inquiry  
Building Consensus  
Change Theory  
Communications Theory  
Conflict Management  
Corporate Planning  
ECE  
Gestalt  
Inter-group Relations  
Matrix modeling of management  
Open Space Technology  
Process Theory  
Shared Leadership  
Systems theory  
Team Philosophy  
Use of Self

## **APPENDIX C: Sample Long-Range Planning Process**

### ***Sample Process***

One consultant related this step-by-step plan that she uses in her long-range planning process:

1. Define planning process.
2. Achieve Board agreement.
3. Conduct SWOT analysis.
4. Collect data, including conducting one-on-one interviews with Rabbi and President and focus groups with key committees and lay leaders.
5. Analyze strategic issues that emerge from SWOT and data collection.
6. Create an action plan from strategic issues.
7. Write a report.
8. Implement regular six-month checkbacks.
9. Review plan yearly and revise.

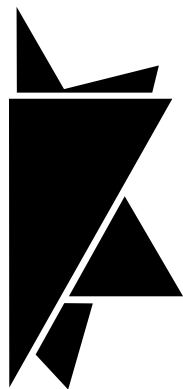
## **ABOUT THE AUTHORS**

Noga Newberg is a teacher committed to transforming urban education through cutting edge curriculum and community building. From 2002-2004 Noga was a research analyst for the Mott Foundation researching the intersection of the after school and community school movements. Noga served as the founding president of Kol Tzedek Synagogue in West Philadelphia. She holds an MA in Education from Arcadia University.

Sharon M. Ravitch is a Senior Lecturer at the University of Pennsylvania's Graduate School of Education and is a Faculty Fellow in their Center for Collaborative Research and Practice in Teacher Education. Ravitch earned two master's degrees from Harvard University's Graduate School of Education, one in Human Development and Psychology and the other in Education. She earned her doctorate at the University of Pennsylvania. She worked as the Consultant for Educational Leadership and Organizational Development at the Auerbach Central Agency for Jewish Education from 2000-2003. Ravitch has published *The School Committee Handbook* and a nationally cited study entitled "Engaging and Retaining Jewish Youth Beyond Bar/Bat Mitzvah: An Action Research Study." Ravitch speaks nationally on the areas of organizational and professional development for synagogues, research and evaluation, multicultural education and teacher education.

David A. Teutsch is the Wiener Professor of Contemporary Jewish Civilization and director of the Levin-Lieber Program in Jewish Ethics at the Reconstructionist Rabbinical College, where he formerly served as president. Editor-in-Chief of the seven-volume *Kol Haneshamah* prayerbook series, he has completed four volumes of *A Guide to Jewish Practice*, as well as numerous other books and articles, including *Spiritual Community: The Power to Restore Hope, Commitment and Joy*. Formerly executive director of the Federation of Reconstructionist Congregations and Havurot, Teutsch has pioneered congregational use of values-based decision making. An honors graduate of Harvard University, he was ordained by HUC-JIR and earned his PhD in Social Systems Sciences from the Wharton School. He is a sought-after consultant, trainer and lecturer.

**STAR**



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