

The ability to manage change is a core leadership skill. It is not simply a challenge of strategic planning. Change managers are proactive and reflective. They have both self-awareness and the ability to manage their emotions. They have a vision and set of values that motivates others to step forward and the discipline to provide consistent leadership.

Change appears in many forms. Leaders need to manage change when they introduce a new process for the board, charter a committee or engage their staff in a new way.

Scene from a “Typical” Synagogue Board Meeting

The President has just come back from a leadership workshop and wants the board to develop a set of board expectations. To help the brainstorming process, he writes their ideas on a flip chart.

To focus everyone’s attention, the President mentions the need to put cell phones away. He asks for their help to reduce sidebar conversations. After a few minutes, two of his officers are engaged in sidebar conversations. Several are scrolling on their smartphones. A long standing board member crosses his arms and grumbles, “What has this type of exercise got to do with board work?”. Another officer who came in 15 minutes late now taps his watch as if to say, “Why are we taking time for this exercise?”

The President came into the meeting with high hopes to begin a process of board improvement and change, but now he is experiencing verbal and non-verbal resistance.

In order to achieve change in any setting, leaders need to be able to explain why the change should be made and convince a core of stakeholders to support the change process. The President, in the earlier example, was inspired by the leadership workshop he had just attended, but he could not get his officers on the same page. He wasn’t able to reshape and repurpose the board’s work alone.

This session shows leaders how to use change management strategies to design a plan for future changes. Synagogues that are able to communicate a vision, inspire new innovations and manage change are substantially more likely to experience growth (Facts on Growth-2005-Hartford Seminary). Some leaders think that visioning and planning work is “fluff” and that real leaders just get things done. We believe that real change involves learning something new as a leadership team, something that challenges your thinking.

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To achieve success, it is essential that leaders manage a range of change approaches. Harvard professor, Dr. Ronald Heifetz, argues in *Leadership Without Easy Answers* that leaders must be able to address both technical and adaptive change:

Technical Change – In this paradigm the expert has all of the knowledge and skills to make the change. For example, an orthopedic surgeon fixes your broken arm. S/he has all of the expertise to solve the problem at hand. The patient is passive, a spectator to change happening around him/her.

Adaptive Change – In this paradigm stakeholders must learn something new. This is an active learning process, requiring effort, motivation and readiness. For instance, we go to a fitness coach to help us understand how we can eat more sensibly and exercise more effectively. This process engenders growth and creates new opportunities.

In the Talmudic text from the Leadership Plan (Sulam for Current Leaders session one), we see two approaches to rabbinic leadership. In the face of communal challenges, one rabbi claims that he will simply be the expert. The community can rest assured because he is there.

By contrast, the other sage advocates a different kind of plan, centered on communal engagement and empowerment. He intends to educate and mentor people with the resources so they can be future teachers and learners.

In the book *Holy Conversations*, Alban consultants Dr. Gil Rendle and Alice Mann have built upon Heifetz' paradigms and have expanded the field to three models of change. They are as follows:

- Problem solving
- Developmental
- Structural

One of the great leadership challenges is to pick the right path for your community.

Problem Solving Change – Technical: Problem solving involves known answers to known problems. These involve technical change. One example of this type of technical change in synagogue life involves choosing the right maintenance contract or getting the appropriate person to replace a window.

Developmental Change – Adaptive: Congregational leaders involved in developmental change want to know what their next chapter will be and where are they in their congregation's history. How can they set new goals that stimulate growth and innovation?

Developmental change is often inspired by vision. Leaders feel it is time they work as real teammates. Perhaps they feel it is time to write a new chapter in the congregation's history, to engage a new rabbi, to update the religious school curriculum and create a new board process. Developmental change occurs when people stop reacting and move to reflective "balcony space" where they can see things from a new perspective. They invite others to join them there. Sometimes change is thrust upon you. Sometimes change is planned. Adaptive change leaders are looking for ways to shape the future, not just react to it.

Structural Change – Very Adaptive: Sometimes the very foundation of an organization needs to be reshaped, repurposed and adapted for changing situations. The 40 years our ancestors wandered in the desert tells the story of a people who develop a capacity to lift up the tent pegs and move their camps when circumstances demanded it.

When the Temple was destroyed by the Romans in 70 AD, the priestly tradition was dealt a deathblow. Rabbi Yochanan Ben Zakkai slipped out of the city gates and created a brand new rabbinic community in the town of Yavneh. In Yavneh, prayer would replace the sacrifices and the rabbinic community would replace the priests. Instead of Levite choir there would be a community of study. This was a bold departure; a whole new structure. Rabbi Ben Zakkai would have to help his community learn to create a new society together. They would have to reinvent the Law and develop new rituals.

Today communities face a variety of challenges. Sometimes synagogues faced with demographic or financial stress need to boldly turn and decide to reposition, scale down, move or merge. They need strategies that require structural changes, requiring very adaptive behavior on the part of leaders.

In today's economic climate, kehillot may have to decide to partner with another synagogue to run a joint religious school or agree to share a staff person. They may choose to share a campus with other organizations where they give up some autonomy, but gain financial flexibility. They may decide to focus on a few strategic programs and prune back others.

Adaptive change leaders are looking for ways to shape the future, not just react to it

Like developmental change, structural change requires that many people be engaged in discerning the future. When fundamental issues are at stake many stakeholders will have to buy in for change to happen.

Management consultant, Peter Drucker, argues that you need to know what problem to work on:

"Defining the problem may be the most important element in making an effective decision. A wrong answer to the right problem can, as a rule, be repaired and salvaged. But the right answer to the wrong problem that is very difficult to fix".

What kind of change does your kehilla need to make?

In their article about how congregations gather today called "Faithful" (2017) the authors (Rendle, Greenwood, Philips, Kuile, Thurston) consider the work of most denominations and brick and mortar congregations.

Most congregations focus their resources on **improving** existing programs and services for their prospective members. They spend little time **creating** new initiatives for future generation of members.

- Denominations focus on dues paying affiliated association members
- Synagogues tend to focus more on current affiliated members

Visionary Leadership

Faithful describes two approaches:

Improving vs Creating

Type of Work	Requires	Serves	Capacity
Improving	Doing new things to help what doing now: Strengthening current boards. Working on members' satisfaction.	Affiliated/ Engaged	Within the scope of established institution.
Creating	Learning new things about what we don't know: How to do- voluntary dues- programs without walls	Unaffiliated/ Less Engaged	Beyond their scope

The authors ask could Blockbuster Video have created Netflix streaming services? They note that most observers find that leaders are not willing or able to disrupt their own exiting product lines (See The Innovators Dilemma- Harvard Business Review 1997- Clayton Christensen). This makes them less inclined to innovate. Even a small change like adding an independent *minyán* (prayer group) can create concern that means "about main service".

In *Next Generation Judaism* (2016) , Rabbi Mike Uram describes how he divided his University of Pennsylvania Hillel students into two groups. He divided students into Empowered and Engaged, so he covered the fissure he was creating for less connected:

- **Empowered-** Products of Jewish schools and camps. Jewish knowledge. Ritual skills. Consistent involvement over years.
- **Engagement Jews-** Have substantially less knowledge and skill and, Jewish experience. Their engagement is episodic- not consistent.

Uram argues that leaders trying to welcome less affiliated, connected and committed Jews need new tools and approaches. The same approach will struggle to serve both segments. It is no wonder that new organizations and networks are stepping up to create more accessible, open and low cost approaches. This is a natural evolution that will not be stopped. That said, USCJ Sulam Leadership believes that leaders can at least **create more space for new people and approaches to develop.**

In our Thriving Congregations Assessment, we call out certain attributes that need to be strengthened in order to fulfill a vision of welcoming and engagement.

- Share compelling Vision
- Create clear expectations for group doing outreach
- Ensure innovations
- Create collaborations

Change Management Requires that Leaders Change

Congregations that wait to address a changing world will need to strengthen these attributes.

Most synagogues have a routine, a status quo or DNA that determines how they function. They may stretch a bit, but, like a rubber band, they tend to return to their original state.

Leaders may have goals of being welcoming, but they still don't reach out to others at the *kiddush* lunch. The rabbi may talk about sacred partnership, but s/he fails to attend critical strategic planning meetings. The staff may talk about team work but they fail to consider how their plans impact others (schedule, use of space, duplication etc.).

When someone challenges the homeostasis (status quo) of an organization, they will inevitably face resistance. Our patriarch Abraham names the problem, "Idols don't make sense." Once he names this condition, he unfreezes the situation and can be open to the new. Ultimately his openness leads him to God's covenant and God's offer of a blessed community. Abraham is given the opportunity to go out and make change.

Abraham will have to navigate various dangers without losing faith and quitting. Over time, his faith solidifies and he develops spiritual practices. Even when he is in pain he can summon the energy to welcome guests. These new practices become so deeply ingrained that he approaches new situations with greater and greater zeal. He places mission over personal comfort or even the needs of his family. He lifts up the promise of the future over the concerns of the present.

Most leaders are not like Abraham. In a typical longstanding homogeneous congregation, only a minority are ready to write a new chapter. No matter how bold the initial planning statement, when change happens, it tends to be, at best, developmental.

Sulam for Current Leaders helps leaders prepare for these decisions.

In congregations with demographic decline it is challenging to find the courage and strength to mount a campaign of structural change. Years of decline just make it tougher to motivate leaders to work on the campaign. They often face lethargy, inertia, cynicism and discouragement. They may tend to ignore problems and avoid planning. Some leaders react impulsively to opportunities for change. They toss new ideas overboard.

We suggest a third way between avoidance and reaction: intentional leadership planning.

Visionary Leadership

Most leaders are problem solvers, managerially focused. They bring analytic skills from their professions. Professional staffs are often more conceptual and intuitive but they must partner with more managerial lay leaders. Both lay and staff leaders can become too focused on the day to day management challenges of congregational life to see the big picture.

As Dr. Gil Rendle notes, change leaders can make managers nervous. People may feel they will lose power or voice under the new plan. They may be asked to stop doing what they are comfortable with and be asked to do something new they feel less confident about. In the midst of change, they may feel that change leaders failed to support them. They may oppose new values, new practices and the people proposing them.

The book *Sacred Strategies* (Aron, Cohen, Hoffman and Kelman) describes the visionary congregation as one that is: Reflective, participatory, holistic, purpose drive, involved in meaningful engagement and innovation. In transformed congregations we can see real growth in many of these areas. Transformed congregations tend to have strategic synergy, i.e. these elements work holistically together to create new energy and momentum!

	<p>While most congregations can be strengthened, few can be transformed entirely. Transformation entails major changes in the quality and quantity of worship, study, social action, <i>chesed</i> (loving kindness) and financial sustainability, etc.</p> <p>Most transformational congregations are breakaways, start-ups or are blessed with clergy and/or lay leaders who act as charismatic change agents. Lay leaders can join change agents or resist them. They can seize the opportunity to be a part of something bigger or let the opportunity pass.</p>
<p>“Feeling Organizations”</p>	<p>Synagogues are places that are dominated by feelings. While board members may be analytical at work, they are sensitive to the impact of their actions on others in their kehilla work.</p> <p>They may initially support a proposal from the Governance chair, but they are also concerned how other board members will feel. These board members have good friends who sit behind them every Shabbat morning. One upset member can lead to another.</p> <p>Change upsets the homeostasis and creates conflict. These tensions may start, to quote Dr. Susan Shevitz, “suddenly and without warning” that evening in the parking lot. The benefits of a strategic initiative may take years to come to fruition. Most of us are risk avoiders. The short term pain of change is certain but long term benefits can seem vague.</p>
<p>Leaders Face Resistance</p>	<p>Change agents have credibility with the system but they do not agree to be coopted by the system. Just because Harry doesn’t like change, the leader does not have to agree to take change off the table. In some cultures Harry has been enabled by others. They try to protect Harry from feeling hurt. The process of trying to protect all of the Harry’s and Sarah’s who fear change can create a culture of avoidance.</p> <p>It takes a guiding coalition of the proactive to champion change.</p>

My fellow Alban Institute consultant, Alice Mann, notes some of the challenges that leaders face in channeling leadership anxiety and managing change. (Interview May 27, 2011)

- It will be harder than you expect when the emotional stakes are high
- At least some people you like and respect will probably be upset with you
- At least some people you fear will probably be upset with you. They will attack you for errors in content and process
- When this resistance starts, it will feel like a 24-7 job for a while
- You will find out things about the members, clergy, other staff, and yourself that you would rather not know. You are no longer simply a happy attender. There is a “loss of innocence” in a religious sense
- If you step up to leadership it can lead to deeper spirituality, but for many leaders, it ends at the disillusionment stage. (See Charles Olsen’s “Transforming Church Boards”)
- You can’t do it alone, no matter how hard you try. The skills of bringing others with you are paramount.

**Can’t Do it Alone:
Scope of Work**

Leaders need a powerful coalition of supporters for change. If a leader takes on too much of the role they will become the lightning rod for all kinds of conscious and unconscious resistance. This resistance is so strong that most mergers, for example, fail because leaders just become exhausted.

It is better that the whole board and the nominating committee explain to Seth that his term is up after 6 years in June, than for the President to have to ask him to suddenly step down after 10 years because leaders want some “new blood.” Change agents should promote policies and procedures on behalf of the congregation, so no one person is seen as imposing their personal agenda on another person.

**Well Planned
Decision Making**

Some leaders are passive. They may see board issues, but choose not to act. Others react to different issues that may emotionally hijack a board meeting. Leaders who are self-aware and socially aware can help other leaders learn with them. They can strive to be more transparent in how they make decisions and communicate with synagogue stakeholders.

Some leaders do all of their deliberations in the executive committee or senior staff team and then ask the board to vote yes or no. On important strategic and policy issues it is helpful to share the options you considered. Math teachers ask students to "show their work". Effective leaders explain their thinking on strategic issues, test out ideas and invite the leadership community to consult them.

At some point leaders need to implement their decisions. As the classic Nike ad says, "Just do it." Synagogues are like small entrepreneurial family businesses. They have limited staff and imperfect market research. At some point they need to put ideas into action. As Peter Ducker argues, "the wrong answer to the right question can be fixed." If our membership strategy calls for a member profile we need to test one out. If it needs to be tweaked, it may be the wrong tactic but it is addressing the right problem.

The Campaign of Change

John Kotter, a professor at Harvard Business School and world-renowned change expert, introduced an eight-step change process in his 1995 book, *Leading Change*. We will look at his eight steps for leading change and apply them to the synagogue world.

Step One:
 Create
 Urgency

Leaders help show followers the lay of the land. According to Jim Collins (*Good to Great*) this requires telling hard truths. Most synagogues are internally focused. Leaders help followers look out at the changing external environment and develop a plan for the future. People can be motivated by taking strength and building on it or by looking at a weakness and trying to close the gap between current reality and a desired future.

Step Two: Form
 a Powerful
 Coalition

Harry Truman once said that leadership is about getting people to go somewhere they had not intended to go. Once they get there, they are glad they came." Leaders have followers. They also have dedicated partners that can go the distance. Successful leaders form teams with critical competencies and skills.

- Political and financial stakeholders
- Thought leaders
- Representatives of key constituencies
- People with technical knowledge.

Step Three:
 Provide a
 Vision for
 Change

In *Leadership: The Challenge*, Posner and Kouzes (2002) point to two important leadership skills

1. Ability to provide an honest assessment about the current situation. (create urgency).
2. Ability to provide a hopeful forward looking vision of the future.

Leaders point to gaps to address but they also dream of the potential for greatness.

When people imagine the future they tend to be more optimistic. Visioning encourages brainstorming that is not interrupted with charts of "that won't work here". It helps people visualize a stronger community. It suspends detailed problem solving which tends to focus on the present and is deeply shaped by the past. Brainstorming a vision banishes the old mantra, "We have tried that before."

Step Four:
 Communicate the
 Vision

Most congregations, as discussed in the Leadership Plan, have not worked with their vision in the last 5 years. If they have created one, it often gets filed away in a binder.

Such vision work is largely wasted. A finely word-smithed vision is of little use unless it is creating urgency for change and motivating leaders to step forward. As a businessman, I wanted to understand how vision might shape the work environment.

I learned about moving from vision to action from my largest customer, Home Depot. Home Depot wanted the national purchasing staff to be focused on the needs of their local stores. They encouraged the buyers to hold their meetings right next to the merchandise in the store rather than at the office. When the buyer entered the stores, they put on an orange apron which reminded them to bring their core Home Depot values into the retail space. If they saw a customer struggling, they were to stop what they were doing and move to help the customer.

I once was present when Sam Walton was doing an orientation for new employees at a Sam's Warehouse Club in Dayton. He asked them to swear: "I solemnly swear that if I am within 10 feet of a customer I will come up to them and ask them if I can help, so help me, Sam."

Corny? Yes! Effective? Very.

Visionary leaders like Sam Walton role model the changes they seek. If he can associate to engage the customer he does on every opportunity. They take time to communicate that vision even if they are one of the richest men in the world at the end of his career.

Step Five:
Remove
Obstacles

Removing obstacles can empower the people you need to execute your vision and it can help the change move forward. Alice Mann argues that leaders need to anticipate the cost of change —“What would we have to let go of? What would it take to accomplish this? Whose feelings will get hurt if we do change? Whose hopes will be dashed if we don’t?”

Leaders need to see the political organizational and human factors involved in change:

- Identify, or hire, change leaders whose main roles are to deliver the change.
- Look at your organizational structure, job descriptions, and performance and compensation systems to ensure they're in line with your vision.
- Recognize and reward people for making change happen.
- Identify people who are resisting the change, and help them see what’s needed.

Step Six:
Create Short-term
Wins – Small
Steps

Nothing motivates more than success. Give your team a taste of victory early in the change process. Within a short time frame (this could be a month or a year, depending on the type of change) leaders will want to have results that your leadership can see.

Without this, critics and negative thinkers might hurt your progress. Alice Mann suggests that change leaders choose early targets that are not so expensive. You want to be able to justify the investment in each project.

I remind leaders that social entrepreneurs develop programing in world of imperfect knowledge. There are times when good may be good enough. Rabbi Tarfon (Pirke Avot) reminds us that we do not necessarily need to finish the task, but we are needed to do our part. He challenges us to take a first step, not to have perfect plans.

The following are examples of some short term changes that one might achieve on the road to a larger board development goal.

5-15 Minute Team Building Stepping Stones

- Brainstorm a list of board expectations (attendance, giving, and committee work) - have a governance team work on refinements
- Brainstorm a list of board behavioral covenants (come on time, read materials in advance, no sidebar conversations, active listening, respectful speech etc.) - have a governance team work on refinements
- Do a 15 minute small group (4-5 people) break out to discuss a key issue or review a committee Job Description. Have groups report out one major idea
- Do a 5 minute process check on satisfaction with meetings. What is working well? What could be better?
- Do a 5 minute ice-breaker to help members better understand each other's stories
- Do a 10 minute review of one major board goal
- Create your leadership profile and share it with a team mate –10 minutes – for the pairs discussion
- Review the role of Executive Committee as a whole group: Discussion – 15 minutes

Practicing change can happen in a matter of minutes.

Step Seven:
Build on the
Change

John Kotter argues that many change projects fail because victory is declared too early. Real congregational change takes years of adaptive learning and a consistent campaign of change. Real change is often a 2-3 year journey. It can take congregations after a merge 10 years to stop saying “we and they.” Change management is not just a project- it is core competency. The Japanese manufacturers call the process of continuous improvement *kaizen*. It means to break something down and put it back together. It is based on a profound curiosity, a commitment to engage many minds and a humble appreciation that things can always be improved, so make many small steps.

Step Eight: Anchor the Changes in Corporate Culture

Change management needs to become part of the core of your organization. Change leaders can tell stories of the major decisions they made and how they built agreement. They develop team building (5-15 minute tool chest) processes and ritualize them. They show that proactive leadership is a blessing.

Conclusion

Change Agents - Going the Distance

Planning a change is a long journey. It takes fresh ideas, enthusiasm and leaders committed to the initiative at hand. Change leaders project a sense of urgency to a core leadership group, such as a synagogue board. Together they shape a vision that can inspire action. Resistance causes friction and not all ideas or leaders will make it to the end of the campaign.

Experience shows that if the coalition is big enough, and the vision resonant, change can happen. It has happened to other communities, and it can happen with yours too!