

MAPPING THE FUTURE: STRATEGIC PLANNING IN THE AMERICAN JEWISH COMMUNITY

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Strategic planning provides a road map to an organization's future direction, sharpening its focus. The process outlined in this article involves several lay committees that assess the internal and external environment and then propose planning initiatives essential to the organization's mission and responsive to its operating environment. For the planning process to be successful, the necessary funding to implement the initiatives must be built into the budget and the leadership must be committed to the necessary changes.

Knowing where we are going is critical to reaching our destination, and using a map can be helpful. Strategic planning provides a map for organizations seeking to identify their future destination. Strategic planning is also about caring. It provides a structure and a process for those who care about the future directions of their organizations. A strategic plan is designed to help organizations thrive as they confront future challenges. Planning helps position an organization by identifying and then mapping the implementation of strategic initiatives.

Strategic planning for Jewish communal organizations has its own unique characteristics. Using case examples from nine Jewish communal organizations that engaged in strategic planning between 1992 and 2002, this article illustrates those characteristics. The examples are drawn from my experiences as a strategic planning consultant in Jewish communities across the United States. The Jewish communal organizations include six synagogues, a Jewish community relations council, and two national Jewish education/fund-raising organizations with programs in Israel. This article begins with an overview of strategic planning, and then presents methods used to develop plans, out-

comes derived from the plans, and lessons learned.

OVERVIEW OF STRATEGIC PLANNING

As Austin and Solomon (2000) have noted, strategic planning in the human services is no longer seen as a luxury but rather as a necessity for agencies to thrive. Planning enables organizations to deal with uncertain and changing environments by providing the specific guidance to do the following:

- adjust internal structures and processes to account for changes in the external environment
- focus on organizational learning needed to position agencies to be responsive to changing community needs
- shift professionals and lay leaders from a reactive form of crisis management to a proactive form of strategic management
- assess the community context of human service organizations
- move from preparing plans (that may sit on the shelf) to plans that launch the first steps in a larger change process

Jewish communal organizations need planning just as do the public and non-profit sectors (Solender, 1992).

Berman (1998) defines strategic planning as a set of procedures that help organizations and communities align their priorities with

It is a unique honor to be invited to contribute to this Special Issue celebrating the successful career of my long-time colleague, Stephen D. Solender.

changing conditions and opportunities. From a slightly different perspective, Bryson (1995) sees strategic planning as a disciplined effort to produce fundamental decisions that shape the nature and direction of organizational activities, where the most important outcome is the development of strategic thinking.

Strategic thinking relies on the development of a keen sense of organizational cultures, histories, and external environments. This keen sense comes into play when one steps back from the daily demands of organizational life to acquire an historical perspective, as well as to view the organization's culture within the larger context of societal changes, e.g., asking such questions as "How does our organization need to adjust or change in response to changes in our community?" or "How can we adopt promising practices from other organizations that are different from ours?" Another aspect of strategic thinking is the intense examination of assumptions that underlie different aspects of organizational life. This capacity is needed to counteract the inward-looking attitude embodied by "If it isn't broken, don't fix it." Finally, strategic thinking involves the speculative process in which alternatives and viable options are considered, that is, thinking outside the box.

STEPS IN THE STRATEGIC PLANNING PROCESS

In the nonprofit sector the strategic planning process is as important as the outcome. Therefore, careful attention to the process of lay and professional involvement is as important as the structure and clarity of the planning steps.

Most approaches to strategic planning in nonprofit organizations proceed along the same four steps: (Alison & Kaye, 1997; Bryson, 1995; Eadie, 1983; Julian & Lyons, 1992; Steiner et al., 1994):

1. reassessing an organization's mission and developing a future vision

2. assessing the external environment including competing organizations
3. assessing internal operations and services to major stakeholders
4. developing and implementing a plan

Some of the strategic planning literature focuses these dimensions around the organization's strengths (S), weaknesses (W), opportunities (O), and threats (T), which is often referred to as SWOT analysis.

Clarifying the Organization's Mission

By reviewing the current mission statement or developing a new one, lay leaders and staff engage in a wide-ranging exploration that captures three interrelated elements: (1) the history and strengths of the organization, (2) the core values that guide all its operations, and (3) the key programs that comprise the organization's reason for being. This review can also identify major goals and the strategies to achieve those goals. In some organizations, the mission statement is captured in a few sentences, whereas in others the goal is to limit it to one page. In all cases, the purpose is to capture the essence of the organization in as few words as possible and to resolve debates over language and philosophy.

Scanning the Environment and Competition

This process looks outside the organization to identify trends in the political, social, economic, and technological environment that affect the organization. Unless assessed carefully, these trends operate like winds aloft in an ongoing weather system that affect the daily life of an organization. Scanning the environment helps to identify organizations in the community that may compete with one's organization and/or engage in promising practices that could be adapted for one's own use.

Assessing Operations and Stakeholders

This process involves an in-depth assessment of the clients/customers/members/do-

nors/recipients—in essence the stakeholders that make up the community of interest in any nonprofit organization. How have their demographics changed over time? What strengths/capacities do they bring to the organization? What are their perceptions of the organization in relationship to their needs and interests? In addition to stakeholders, an in-depth assessment of internal operations is needed to understand and evaluate the organization's financial, personnel, governance, and communications systems. Each of these areas is critical to the effective functioning of an organization.

Developing and Implementing a Plan

Based on the findings that emerge from the assessment of the mission, stakeholders, promising practices, external environment, and internal operations, a set of directions or initiatives emerge that are designed to reflect the highest priorities for the organization's future. In the case of strategic planning, these four to six initiatives provide direction for a three- to five-year plan. The plan also can reflect futuristic thinking in the form of a vision statement that describes the organization 15 to 20 years into the future. Vision statements are built on creative speculation of what the organization could look like if money, staffing, and facilities were plentiful.

Once the major directions and vision are discussed thoroughly, an implementation plan is constructed for inclusion in the final printing/disseminating of the strategic plan. An implementation plan specifies timelines for implementing each strategic direction/initiative, the primary people responsible, and the budget needed for successful implementation.

The success of a strategic plan implementation is often based on the integration of its major initiatives into the annual operations plan of the organization. This approach helps incorporate new changes into the daily life of staff and lay leaders. It also helps translate the goals of the new initiatives into outcome objectives, monitoring systems, and timelines for periodic review and adjustment.

OUTCOMES OF THE STRATEGIC PLANNING PROCESS

The strategic planning process undergone by all nine Jewish communal organizations described in this article followed similar courses. For each process, these five committees of lay leaders and senior staff members were constructed in a similar fashion: Mission, Membership, Competition & Promising Practices, External Environment, and Internal Operations. The size of the committees varied from four to fifteen members, and each was led by co-chairs who were lay leaders. The board of directors of each organization was involved in (1) making the decision to develop a strategic plan, (2) hiring the consultant, (3) appointing the committee co-chairs, (4) creating a vision statement, (5) reviewing drafts of the plan, and (6) approving the plan and the implementation process.

Because congregations have their own cultures, the findings are organized into two groups: those relating to the six synagogues and those to the three Jewish communal organizations. It is important to note that these organizations do not represent the total population of similar organizations, and therefore their individual experiences cannot be generalized to the population of similar organizations. However, using cross-case analysis, the nine organizations are assessed for their common experiences to identify shared themes and lessons learned.

Synagogues

The common planning initiatives that emerged in the strategic plans for synagogues included:

- expanding programs to all age groups
- communicating more effectively with the membership
- streamlining a cumbersome or ineffective governance structure
- restructuring outmoded organizational structures and processes
- strengthening ritual and worship services
- promoting membership development and improved relations

Figure 1. Strategic Planning Initiatives Developed by Six Congregations

Strategic Planning Initiatives	Central Synagogue (NY)	Rodef Sholom (Marin, CA)	Beth Sholom (SF, CA)	Jewish Center of Teaneck (NJ)	Temple Sholom (Bergen Cty, NJ)	Temple EmanuEl (Bergen Cty, NJ)
Program expansion	X	X	X		X	X
Communications		X	X	X		X
Governance	X	X	X	X	X	X
Org'al structure & process	X	X	X			
Worship & ritual	X				X	X
Membership	X			X	X	
Financial resources	X	X		X		
Facilities developmt				X	X	

- developing new sources of financial support
- and improving the use of facilities.

As noted in Figure 1, four of the synagogues were located on the East coast and the other two were on the West Coast. Three were large synagogues (600–1200 members), and three were intermediate (200–450).

The only initiative that was common to all six synagogues was streamlining governance. This is not surprising, given that congregational boards and committees are often caught between the goal of fostering involvement and the goal of making decisions based

on a fiduciary responsibility for the viability and integrity of the nonprofit organization. Some synagogues had more than twenty Board committees along with uneven expectations and accountability. This called for increased attention to consolidation and integration in order to balance the demands and workloads across committees.

Communal Organizations

Jewish communal organizations reflected different concerns. As seen in Figure 2, the most widely shared strategic initiatives were based on the need to strengthen programs/

Figure 2. Strategic Planning Initiatives Developed by Three Jewish Communal Organizations

Strategic Planning Initiatives	Israel		
	Hadassah (US, International & Israel)	Children's Centers (U.S., Canada, & Israel)	Jewish Community Relations Council (SF, CA)
Fundraising	X	X	
Programming	X	X	X
Org'al structure & processes	X		X
Volunteer-staff partnership	X	X	
Governance	X	X	X
Marketing & communications	X	X	

services and streamline governance. The two fundraising organizations rely heavily upon volunteers, and both placed major emphasis on strengthening the volunteer-staff relationship. A similar emphasis was placed on strengthening marketing and communications, two initiatives that are crucial to the success of fundraising and educational organizations.

LESSONS LEARNED

For all the Jewish communal organizations described in this analysis, engaging in strategic planning was a first-time experience. Although many of the lay leaders had experience with strategic planning in their businesses or places of employment, most had not experienced strategic planning in the context of a Jewish communal organization. Several lessons emerged from the process.

Lesson #1: Getting Organized

The decision to engage in strategic planning proved to be a complicated Board process for several reasons:

- lay leaders' general lack of knowledge about the nature of strategic planning
- difficulty finding the expertise inside or outside the organization to lead the process
- difficulty finding the funds
- difficulty finding the consulting expertise that understood Jewish communal organizations
- difficulty finding the time and commitment to engage in strategic planning as well as implement the results.

Although some of these complications were resolved by the use of an outside consultant, others persisted. For example, in some of the organizations, seeking the assistance of an outside consultant proved to be quite challenging, (e.g., "Why go outside; don't we have someone inside to guide us?" or "If nothing is broken, why do we need someone to help us fix it?" or "What does he

or she really know about our organization and our community?") It took strong internal leadership, lay and staff, to overcome the cynics and to change the perception that asking for help was a sign of weakness. It also became apparent that careful planning had not been valued as part of the culture of these Jewish organizations, especially those that responded to the crises of the day and found it difficult to develop collective ownership of the organization's future. Such organizational cultures are also affected by the fact that both staff and lay leaders rotate through the life of an organization and some have longer tenure than others.

Lesson #2: Building Trust Through Time-Limited Committee Work

The participatory approach used in these nine cases of strategic planning involved five committees: Mission, Membership, Competition & Promising Practices, External Environment, and Internal Operations. Each had two co-chairs to maintain momentum when one of them could not be present. The length of the committee work ranged from seven to twelve months. This time-limited approach had great appeal to busy lay leaders. The co-chairs of the five committees were led by co-chairs of a steering committee, thereby creating a leadership group of twelve. The consultant met regularly with the steering committee and also worked with the co-chairs of the five committees.

Although some participants initially expressed concern about the potential overlap across the committees (e.g., "Why doesn't the Mission Committee wait until all the others have completed their work?"), they began to understand the special focus of each and were free to define issues as they saw them. The steering committee and consultant reviewed the reports generated by each committee to identify the major themes for further discussion and formulation into strategic planning directives or initiatives.

Lesson #3: Gathering and Analyzing Information collectively

Building ownership of the planning process and especially of the results is a central theme of this approach to participatory strategic planning. As a result, lay leaders began to see that attending meetings alone would constitute insufficient involvement and that between-meeting homework was essential. Based on a set of guidelines for each committee, members began collecting information. For example, digging out the organization's old mission statement provided the Mission committee with its first document to be analyzed as to its current relevance. Similarly, reconstructing aspects of the organization's history also proved to be a powerful tool in developing perspectives relevant to the past, present, and future (Austin, 1996). Similarly, the Membership committee discovered that it had been many years since the major stakeholders inside and outside each organization had been consulted. Key informant interviews, focus groups, and surveys were used to identify key questions and gather the responses. Another example can be found in the work of the Internal Operations committee that began, in many cases for the first time, to carefully assess the governance structure, the personnel system, and communication mechanisms.

Lesson #4: Creating Learning Organizations through Organizational Self-Assessment

The planning process helped educate lay leaders and staff, especially as they uncovered information inside and outside the organization that proved to be helpful in formulating their ideas and recommendations, (e.g., "I didn't know that we . . ."). For example, some of the most intense learning came from the experiences of those serving on the Competition and Promising Practices committee. These members were encouraged to explore the practices of other organizations in the community, some that were similar to their own and others that were quite

different. In congregations, members were encouraged to talk to lay leaders in other Jewish congregation as well as Christian congregations to learn how their boards functioned, how their religious schools operated, and how they engaged in community projects. The JCRC committee members were encouraged to talk with other non-Jewish advocacy organizations, and Hadassah committee members were encouraged to consult with other national women-led organizations like the Girl Scouts. The excitement generated by this type of learning helped build the foundation for transforming these Jewish communal organizations and congregations into learning organizations. The ultimate test of this transformation comes when (1) monitoring the implementation of the strategic plan to learn about what is working and what needs to be addressed, and (2) completing the implementation process in order to lay the groundwork for the next plan.

Lesson #5: Understanding that the First Strategic Plan Is Not Always the Most Exciting Document

For some, the expectations associated with developing a strategic plan were too high, especially when they expected radical departures from current operations. As many observed, "This plan lays out what we should have been doing all along." In contrast, others recognized that the plan was like an architect's blueprint in that it laid out the next steps that were desperately needed, especially when endorsed by the entire Board of Directors. Many participants began to recognize that their organization had been simply "backing into the future" and now had the opportunity to use the strategic plan to build for the future. The plan frequently laid out a set of steps to help "clean up" current organizational issues, freeing it to engage in more innovative activities in the future. For example, one congregation had been so focused on its building campaign that no time had been spent on deciding where they wanted the congregation to go once they

moved into their new facility. In another case, the congregation used the planning process to confront the substantial changes in the demographics of their community (e.g. a slow but steady decline in membership) and began to address alternative uses for their facility, which had been designed for a larger congregation.

Lesson #6: Using Broad-Based Involvement to Generate Ownership and Follow-Up

Ownership can be described in terms of leadership development and organizational accountability. For example, those lay committee members who demonstrated organizational skills and creativity in the strategic planning process were noted by the lay leaders of the strategic planning process for possible future leadership roles in the organization. In one synagogue, 65 congregants participated in the planning process, which represented the largest committee activity in years. It is also important for some of those who had been heavily involved in the planning to promote accountability in the implementation phase, (e.g., annual board progress reports on the implementation of the strategic plan). The challenge in all the organizations was to maintain the momentum generated in the planning phase into the implementation phase. As noted earlier, successful implementation is associated with the incorporation of the strategic planning initiatives into the existing committee and staffing structure of the organization. If the implementation phase is left only to a few people to worry about, then it is less likely to succeed.

Lesson #7: Strengthening the Lay-Professional Partnership

The most successful strategic planning efforts reflected the shared leadership of both professionals and lay leaders. The dynamics of this successful partnership were interesting to observe. Securing the commitment and funding for strategic planning often rested in the hands of professionals. Securing involvement in planning and implementation

often landed in the laps of lay leaders. In one synagogue, it was the senior rabbi who conducted an extensive series of focus groups to get a sense of the congregants' interests and concern. In one Jewish communal organization, it was the lay leadership who pushed vigorously for action steps and timelines needed to implement the plan. In the less successful strategic planning processes, the professional staff abdicated leadership responsibilities by leaving nearly everything to the lay leaders, or the lay leaders could not keep pace with the drive and creativity of the professionals. Needless to say, like all ventures in the American Jewish community, successful and collaborative lay-professional relations are the foundation of successful strategic planning.

CONCLUSION

Strategic planning is used most successfully by Jewish communal organizations that are invested in becoming more proactive and less reactive institutions. One of the by-products of strategic planning is providing a forum or mechanism to give "voice" to the interests and concerns of organizational members that generally do not surface through the traditional channels of governance. Another by-product is the growing recognition that planning activities carried out in Jewish communal organizations can help revitalize processes that had become stuck or dormant (e.g., improved communications, improved decision-making, improved goal setting, etc.) The major benefit of strategic planning is that a plan is developed by those invested in creating a organizational road map for the future. For the first time in many organizations, the strategic plan becomes the document that helps both lay leaders and professional staff develop and implement decisions from the same perspective. It can also help to hold each other accountable for the organization's vitality and direction. Daily decision-making now has a context; namely, "Does this decision help or hinder our strategic planning initiatives?" At the same time, unanticipated

events can significantly affect the implementation of a strategic plan (e.g., loss of major funding or change in professional leadership), and therefore the plan needs to be viewed as a "living document" that needs adjustment along the way. Such adjustments usually involve changes in the timelines for implementing the plan or the need to shift responsibilities (lay to professional or professional to lay).

For first-time users, strategic planning can be enhanced by the use of an outside consultant. For more experienced users, it is a tool that can be used independently to promote continuous organizational renewal at the board and staff level. One of the biggest payoffs of strategic planning is that it can help identify and utilize the expertise buried inside the organization, as well as unleash the creativity often stored and unrecognized in its members.

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Congratulations to Steve Solender for an outstanding professional career.

Through your leadership you have helped provide essential services to Jews wherever they live. You have mentored many communal professionals who are promoting a bright Jewish future and are helping to repair the world.

May you go from strength to strength.

Ellen Goldner
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