

Strategic Planning

Is it Right for Your Congregation? And When do we Need It?



Rabbi Elyse Wechterman
www.rabbielyse.com

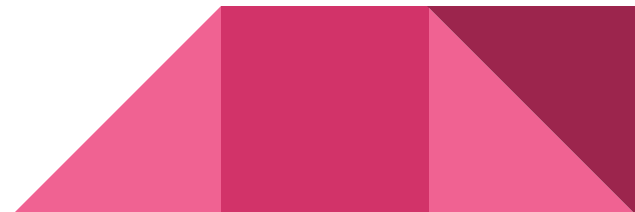
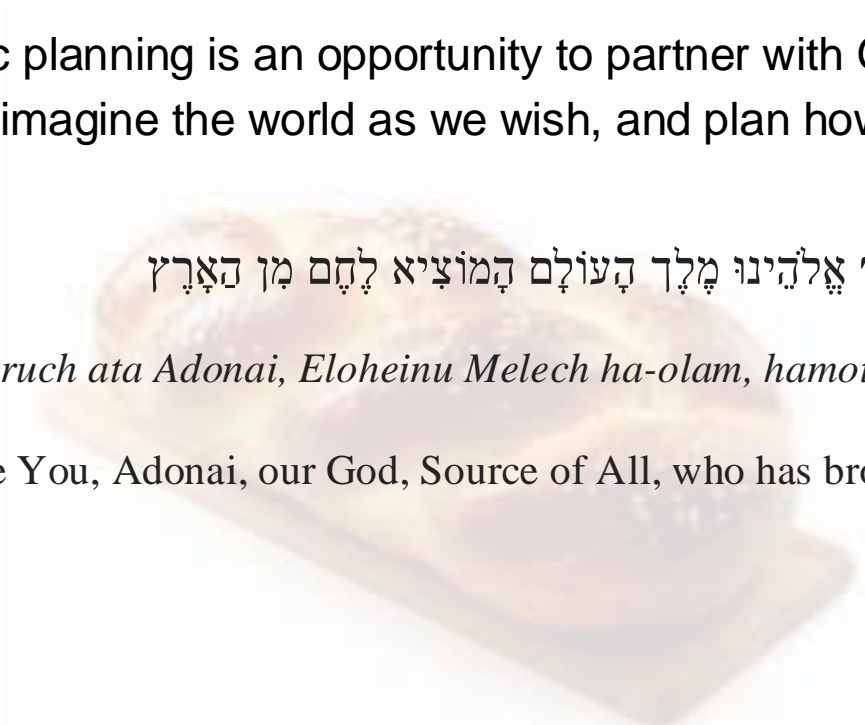
Jewish Context for Strategic Planning

Strategic planning is an opportunity to partner with God in divine creativity, imagine the world as we wish, and plan how to achieve it.

בָּרוּךְ אַתָּה ה' אֱלֹהֵינוּ מֶלֶךְ הָעוֹלָם הַמוֹצִיא לֶחֶם מִן הָאָרֶץ

Baruch ata Adonai, Eloheinu Melech ha-olam, hamotzi lechem min ha'aretz.

Blessed are You, Adonai, our God, Source of All, who has brought forth bread from the earth

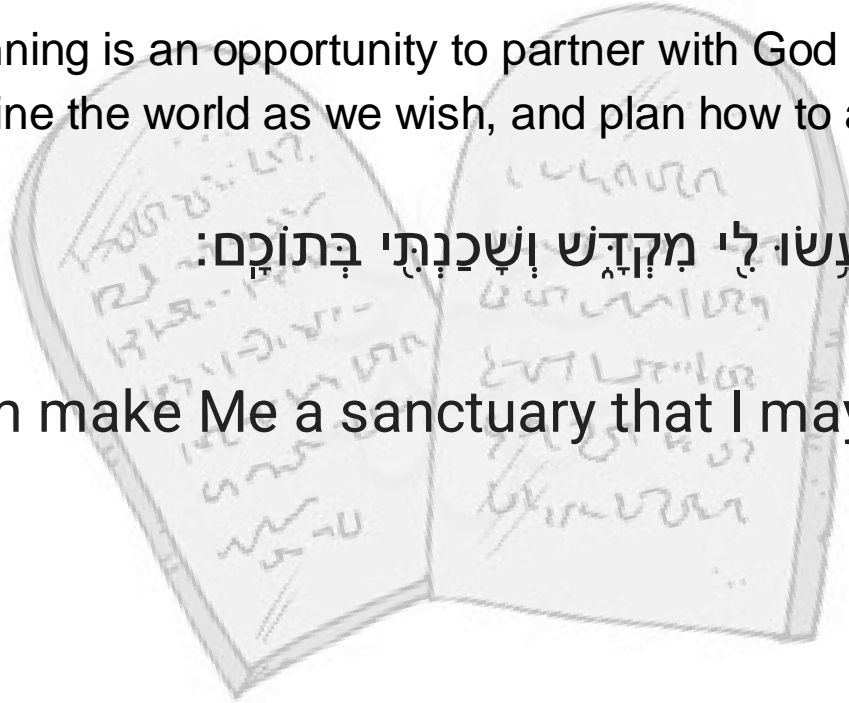


Jewish Context for Strategic Planning

Strategic planning is an opportunity to partner with God in divine creativity, imagine the world as we wish, and plan how to achieve it.

וַעֲשׂוּ לִי מִקְדָּשׁ וְשִׁכְנָתִי בְּתוֹכָם:

And let them make Me a sanctuary that I may dwell among them.



What a Strategic Plan Is & What it is not

A STRATEGIC PLAN

- Engages the congregation in defining its direction and vision.
- Is tailored to the congregation's context and informed by data.
- Builds leadership, creates shared language, and includes SMART goals.
- Focuses on realistic implementation and prioritizing key actions.

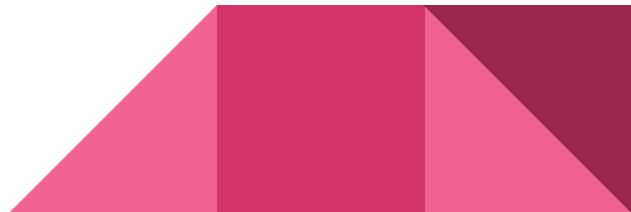
A STRATEGIC PLAN IS NOT

- A quick fix for immediate problems or mediation needs.
- A plan where every goal is implemented right away.
- A focus on daily operations or personal agendas.
- A report that sits unused on a shelf.

A Strategic Plan is an opportunity to ask four questions:

- Who are we? *Hungry people/newly freed slaves*
- Where are we now? *In a field of wheat/Wandering in the desert*
- Where are we going? *Nourishing ourselves with bread / Creating a cohesive community centered on God's presence*
- How do we get there? *Recipe/Exodus*

מה
נשתנה





Can we do Strategic Planning at this moment of upheaval and crisis?

“Planning does not deal with future decisions but
with the future of present decisions.”

-Peter Drucker, 1975

A Strategic Plan is an opportunity to ask four questions:

- Who are we?
- Where are we now?
- Where are we going?
- How do we get there?

מה נשתנה



- Who are we?

- Vision: what the world would look like if you were fully successful.
- Mission: what is your role in getting to the vision? Why do you exist?
- Values: Define how you do what you do.



- Where are we now?
 - History: How did we get here?
 - SWOT: Strengths, Weaknesses, Opportunities, Threats
 - Information: Demographic info, Trends, External information
 - Stakeholder Input: Members, Former members, Others



- Where are we going?

- 3-5 year vision
 - Programming
 - Building/branding
 - Membership
 - Infrastructure (Staff and resources)



- How do we get there?

- Strategic goals
- Organizational or operational goals (SMART)

SMART Goals are

Specific

Measurable

Achievable

Relevant

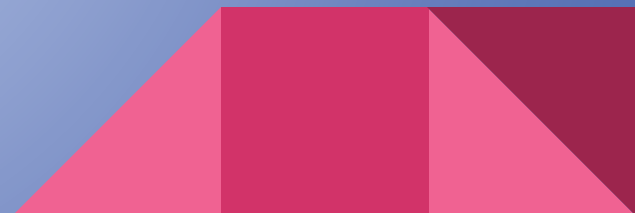
Timely



- Surprise #5: Feedback and accountability - adjustments along the way

There is no point in creating measurable and timely goals if no one is going to check up on them





Next Steps and Resources

Resources

Call your Thriving Communities Liaison

Call a consultant (RJ can recommend)

Look for guides and manuals online

Sample Strategic Plans from Synagogues

[Temple Beth El, Portland, ME](#) (2019)

[Temple Beth Hillel-Beth E, Wynnewood, PA](#) (2024)

[Temple Sinai, Washington](#), DC (2024)

[Congregation Agudas Achim](#), Austin, TX (2021)

