

What a Strategic Plan is and What it is not

adapted from [UJA/NNJ Strategic Planning Manual \(2007\)](#)

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WHAT IT IS

- A strategic plan is an invitation to engage the congregation in self-definition and direction (engagement process).
- A strategic plan is meant to move a congregation toward its stated vision (mission and vision).
- A strategic plan is contextually authentic to the setting and specifics of the particular congregation (context).
- A strategic plan is a process by which congregational leaders, informed by accurate data (quantitative and qualitative), create a comprehensive plan that envisions a three—to five-year future.
- A strategic plan develops a team of leaders who can rigorously clarify issues on behalf of the congregation and create a shared language for articulating its future.
- A strategic plan energizes leaders to implement it rather than developing an aggressive plan that immobilizes them.
- A strategic plan includes realistic and measurable (SMART) goals that provide accountability.
- A strategic plan informs congregational leaders in deciding what not to do (define your lane).

WHAT IT ISN'T

- A strategic plan is not a short-term intervention to fix problems that need a mediator or other intervention.
- A strategic plan is not one in which every goal and action item can be implemented tomorrow.
- A strategic plan is not one in which the leaders can work out significant problems with their rabbi, cantor, and staff (although the strategic plan may shape future staffing models)
- A strategic plan is not focused on daily operational issues
- A strategic plan is not a way to force through pet projects or validate the “loudest voices in the room.”
- A strategic plan is not a report that sits on a shelf.