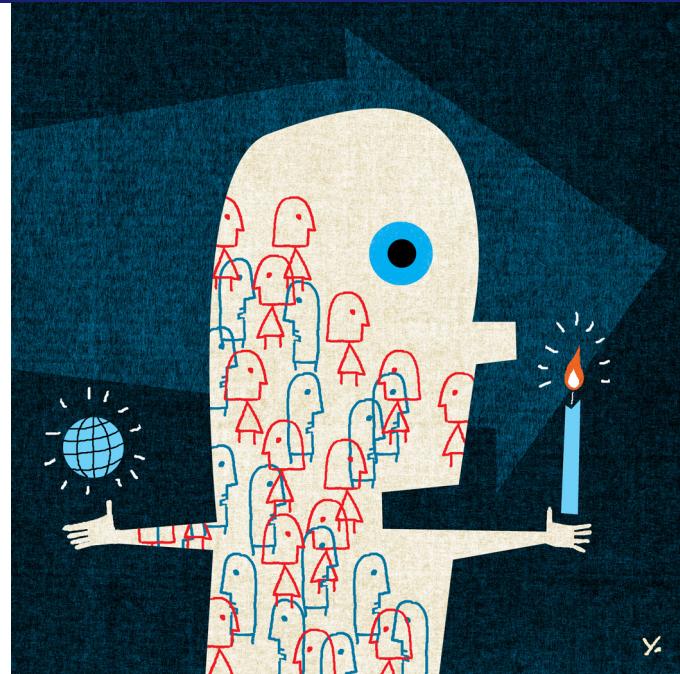# Renewing Jewish Congregational Life Using Blended OD Methods

A report from the Frontline of Community Engagement

Robert Leventhal, Transformation Team Leader, The United Synagogue of Conservative Judaism
in collaboration with David Kiel[1]

In this case study we describe how a team of consultants worked with thirty Conservative Jewish congregations to catalyze transformational change using blended OD methods. This hybrid approach is an example of how practitioners may support the change efforts of many communities over a short period of time.

The Theoretical Frame

Over the last decade, the OD field has come to accept the distinction between Diagnostic and Dialogic forms of OD and change work. Some consulting activities like SWOT analyses, force-field analyses, and Likert-scaled surveys are more associated with Diagnostic OD or classic strategic-planning. Methods such as Appreciative Inquiry and Future Search, and techniques such as Open Space and the World Café are more associated with Dialogic OD. While both forms of OD embrace humanistic and democratic values, it has been argued that practitioners of them operate from different 'mindsets'. [i]

The Diagnostic mindset relies on mid-20th Century modernist perspectives, action research methods, and planned-change paradigms. The Dialogic OD mindset reflects post-modern perspectives, and newer ideas of emergence and complex, adaptive systems. The Diagnostic mindset tends to view organizations as organic systems, and sees information as representing objective facts, and the role of the practitioner as a helpful facilitator and teacher. The Dialogic mindset views organizations as meaning-making systems, sees information as being socially constructed, and the role of the change agent as that of engaged partner.

Change agents are beginning to be more self-conscious about how their practice fits along a Diagnostic-Dialogic continuum. They incorporate both Diagnostic and Dialogic OD approaches in their efforts to assist organizations in catalyzing needed organizational change. One recent example is Yabom Gilpin-Jackson's account of a hybrid approach to change in a health care system. In that case, the practitioners went into the situation with the intention of operating from a Dialogic frame but found that they had to refocus and incorporate more Diagnostic methods with the senior team before engaging the whole system in dialogue. [ii]

This article presents a blended OD approach to changing the organizational culture of a whole religious denomination. The consultants offered a classic strategic-planning model but incorporated elements of Dialogic thinking and methods which they felt responded to client needs. Their experience represents a continuation of the trend toward practitioners making conscious choices of approaches (whether more Dialogic or more Diagnostic) so as to sustain the intervention and increase its

impact. Throughout the case study below, we will comment on the elements deployed that we think reflect the two approaches. At the end, we will summarize the lessons learned about how Diagnostic and Dialogic methods may be combined to catalyze change across a large system of independent but linked communities.

The Change Leader's Perspective and a Description of the Intervention

The United Synagogue of Conservative Judaism (USCJ) is made up of 580 Conservative Jewish congregations across North America. Over the past few decades, the synagogue world has been changing faster than the ability of its leaders to manage these changes. In 2012, the author was hired to fill the newly created position of Transformational Specialist Team Leader at the USCJ to help congregational leaders manage change, and to implement a renewal strategy for the Conservative Movement.[iii] The USCJ Transformation Team (now grown to three staff members) helps congregations to develop the organizational practices that will allow them to support a dynamic and authentic Judaism. (For more information about all aspects of this effort visit https://uscj.org/leadership.)

The challenges facing Conservative congregations. The environment in which synagogues find themselves has changed dramatically in the last half century. Intermarriage rates have tripled. Jews under the age of 40 are less loyal to the religious affiliations of their parents, and less committed to the institutions built by prior generations. Today, Jews are marrying later, having fewer children, and many are delaying starting their families until their mid-thirties. Previous membership-models based on recruiting young families to synagogue preschools and religious schools are becoming less sustainable.[iv]

The emotional and behavioural impacts of these changes are an important part of the story. Many congregations are understandably despondent and concerned. Rabbis, lay leaders, the USCJ leadership and others have all been blamed for this state of affairs. The USCJ consultants had to demonstrate at entry that they were 'part of the solution, not part of the problem'.

Bringing in a positive-psychology approach: an illustrative anecdote. This syndrome of

self-doubt, conflict and blame is often the initial obstacle to initiating positive change. To address the situation, we offered a visioning exercise where I instructed leaders to share only positive, aspirational statements. I asked them, "If this leadership group were successful, what would this community look like? What would people be doing, thinking, feeling and learning?". The following were some of the comments:

- "Kids wouldn't always drop out after Bar Mitzvah.[v] They would care more about Judaism."
- "Families wouldn't just act like consumers."
- "The same people wouldn't always have to do everything."
- "We wouldn't have people who never come to services."

Despite the prompt to envision a positive situation, one negative thought led to another. I showed them how they could talk about the issue in a more hopeful way, in reframed comments such as:

- "I see people making time to go to services to support our mourners."
- "I envision new people stepping up to help make our community more vibrant."
- "I can see parents sitting in the library and studying the Torah while their kids are in school."

The negative statements offered an example of a 'problem-saturated story'.[vi] This kind of language and group dynamic reinforced the negative mindset that contributed to the difficulties that congregations were experiencing. Using the Appreciative Inquiry tactic of 'taking the positive opposite' of a negative statement,[vii] we utilized the insights of positive psychology and Appreciative Inquiry to transform globally pessimistic and critical attitudes that discourage taking action, to more hopeful and optimistic attitudes that support efforts towards specific and significant improvements.

Adding transformative tools and methods. We believe that transforming a pessimistic mindset to a more optimistic one requires not only an effective reframing of issues, but also a toolkit of practical methods that congregations can use to define and achieve their goals. Leaders

can gain more confidence and hopefulness in themselves and the USCJ process by attaining reasonable stretch goals. While such an emphasis on tools harks back to earlier action-research methods, it also provides an enabling and empowering structure that is consistent with a Dialogic OD intent to empower. This toolkit involves three main elements:

- A strengths-based and aspirational model of a thriving congregation.
- The Thriving Congregations Assessment (TCA) based on the model.[viii]
- The Sulam for Strategic Planners (SSP): our highly structured, highly participatory, blended OD approach to comprehensive strategic planning for congregations.

One of the earliest methods that applied behavioral scientists used to mobilize change was a systematic process of self-assessment.[ix] Such a self-assessment is a bedrock principle of Diagnostic OD but, by using the TCA to help form a positive vision, we began to edge into the territory of Dialogic methods. The creation of the TCA has allowed the USCJ to describe desired outcomes and to help congregations overcome their negative mindset because it is intended to do the following:

- Identify areas where the congregation is currently thriving and explore what is driving growth.
- Identify areas where the congregation feels stuck, and explore what is getting in the way.
- Consider unexplored areas where a congregation could potentially thrive.
- Connect leaders to ideas, resources and partners that will help them thrive.

By defining a thriving congregation as "an effective and engaged Jewish community with meaningful visions and goals", we helped our clients to focus on factors they could influence (eg satisfaction with services provided by the congregation) instead of events they have little control over (eg the increasing frequency of intermarriage).

The TCA is organized around seven foundational principles:

1. Develop a shared, compelling vision of purposeful Jewish living
2. Engage in reflective and accountable leadership
3. Manage change and conflict
4. Ensure sustainable and sound operations
5. Welcome participation and connection
6. Motivate deeper engagement in the Torah and Tefila (ie Jewish practice and prayer)
7. Advocate for prophetic justice, and practice Covenantal Caring

In the TCA survey instrument each of the seven principles is further defined by two or more 'attributes', 22 in all. An attribute is an observable practice based on the literature on effective organizations that is consistent with Jewish traditions (eg 'engages in participative planning', 'has clear job descriptions' etc). An attribute's presence connotes a 'strength', and its absence suggests a 'direction for improvement'. In this way, we created a self-assessment survey that leaders can complete in ten minutes. (A fuller description of the TCA may be found in Appendix 1.) The use of the TCA changes the conversation from an exclusive focus on what is going wrong to "what our congregation looks like when it is thriving now". It is not intended to fix the entire system; instead, responders are invited to identify a few appropriate strengths that can be built on. Paradoxically a Diagnostic tool (ie an instrumented survey) helps to produce a Dialogic result (ie changing a core conversation).

Using the 'Sulam' for Engaging and Empowering Strategic Planners. If the TCA provides the broad conceptual framework for self-assessment, the 'Sulam' is the means of carrying out the transformational changes that such a self-assessment might suggest are desirable. Sulam means 'ladder' in Hebrew. The Sulam for Strategic Planners (SSP) is one of six main service programs offered by the USCJ; it involves a 12 to 15-month partnership between the USCJ Transformation Team and a whole congregation.

The SSP consists of a series of planning steps for local congregations to undertake in a set sequence. The USCJ Transformation Team trains and coaches leaders on how to guide their congregations through these steps and, along the way (in classic OD fashion), provides education on improved organizational and leadership processes (ie how to lead a meeting, how to manage conflict, how to create a vision

etc). In addition to visiting the congregation and coaching leaders, the Transformation Team provides articles, webinars and training workshops. (For more information visit: https://uscj.org/leadership/sulam-for-strategic-planners.)

However, the SSP also has Dialogic elements including: extending the system of those stakeholders engaged in the process through community forums and focus groups; inviting new leaders representing different segments of the congregation into the inner circle of planning; and, in the next-to-last phase, giving over control of the content to the taskforces that are formed to create plans in specific areas. In this penultimate stage, taskforce leaders continue to revise the vision for their proposed initiative and to update their taskforce SWOT as they welcome new facts, commentaries and insights.

The SSP involves five phases (See Table 1 below). Each phase is characterized by two structured planning activities that are supported by the Transformation Team and adapted to the local congregations. (A more detailed description can be found in Appendix 2.)

Results for Congregations

Once these ten steps have been completed, the congregation takes responsibility for follow-through. We stay in contact but do not take an active role in implementation. While planning can create some short-term wins (during the first six months), it seems to take two-three years before we really see major results from the SSP process. Some of the things that leaders thought were most important turn out to be less significant later on; congregations may not fully realize what they have planned for several years; some big ideas fade; some little seedlings may flourish later when conditions

are more conducive to change. Almost all congregations achieve some positive results.[x]

Of the congregations that achieve highly significant results, half seem to be in the realm of transformative change eg:

- *Reaching out to young people*. One Rabbi wanted to help her congregation become more connected to the local community. There were many young Jews living downtown in their large city. The rabbi offered a High Holiday service on the roof of their synagogue. That service now attracts over five hundred participants in their twenties and thirties. The congregants are collecting the contact information of these young Jews, and working to connect them to synagogue programs.

- *Using latent talent to address congregants' needs*. Congregants of one synagogue were frustrated about their inability to attract more people to their Saturday morning service so they talked to members who did not attend. Some non-attendees explained that they did not know Hebrew well. Others said that they did not understand the structure of the service. Still others said that they found sitting and listening to prayers boring. The synagogue happened to be blessed with many Jewish educators from local universities who decided to create a parallel class during regular service times which they called a 'learners' minyan' (a 'learners' congregation') that offered an interactive study of the service in an upstairs classroom.

- *Tapping the motivation to care for, and serve, others.* A synagogue engaged in the SSP fell in love with the book *Relational Judaism* by Dr Ron Wolfson, and it became an animating force in their plan. They created a 'Chesed (caring) Committee' which took the lead, and this inspired other leaders. The Chesed

Table 1: Phases and Activities in The Sulam Strategic Planning Process managed by the Strategic Planning Steering Committee and Taskforces

Months	Phase	Activity 1	Activity 2
1 - 2	Start-up	Convene the top leaders' formal-commitment orientation	Establish the Strategic- Planning Steering Committee
3 - 5	Self-assess, engage	Organize the Thriving Assessment (TCA) survey of the leadership Compile the Fact Book	Organize congregational surveys, community forums, focus groups, and interviews with community leaders
6 - 7	Make meaning, set direction	Conduct an initial SWOT analysis based on data collection	Create preliminary vision statements for focus areas
8 - 9	Begin action planning	Establish taskforces based on a situation analysis and a forward-looking vision	Organize the All-Taskforce start-up meeting to initiate group work
10 - 14	Taskforce phase	Meetings – held every 2 – 4 weeks	Convene a priority-setting meeting
15 - 16	Finalize strategies	Finalize taskforce reports	Write the plan, get Board approval

Committee became a significant feature of additional congregational initiatives. Members created support groups to visit mourners and those unable to leave their homes without assistance. They enlisted the service of a nurse to follow up with people at risk. In these ways they helped to form a new identity for the congregation built on caring. As they consider investing in outreach, they find they have a brand as a 'Caring Community' that is attracting attention. The success of the Chesed Committee has changed the conversation for other taskforces, and inspired them to mobilize, too.

An equal number of the congregations that achieve major change seem to focus on some area of operational improvement eg:

- *Restoring the capacity to raise funds*. One congregation had lost confidence in their ability to raise funds. Other organizations were continuously ahead of them in the community fundraising calendar. It never seemed to be 'their turn'. We were able to facilitate strategic planning that was timed to take advantage of optimism over a new rabbi. The plan incorporated a 'wish list' that led to a capital campaign. The process helped them to make a shift to a position where they could advocate for themselves. They were then able to renovate their sanctuary.

- *Taking Responsibility for Finances.* One congregation had large, ongoing, structural deficits. They had a culture of low transparency about finances. Our planning process required that they create a Fact Book and 'put the numbers on the table'. The leadership learned that a few leaders had understated the annual losses and tapped restricted endowment funds. Once this practice stopped they could begin to have realistic conversations about their financial situation and to take responsibility for their budget. They hired a fundraising consultant, and sold their building and used the proceeds to secure a facility that suited them better and was more affordable.

- *Identifying and mobilizing inner resources.* A large congregation had not done financial planning for a long time. The SSP helped them see that they had many multigenerational families with financial resources. Through the SSP, they overcame

a culture of caution over staff expenses, and hired a part-time development director. One year after the plan was accepted, the position was paying for itself. Now the congregation has more resources to address its needs and create even more engagement.

These vignettes capture the flavor of the early results and illustrate the potential of the SSP and the TCA framework. Even though there have been prior experiences with change-management work in the Jewish world that align with these methods and principles,[xi] the SSP, as far as we know, is the leader in using an OD-oriented planning process that has been systematically adopted by synagogues. We also think the model presented is illustrative of an approach that can be adapted to transform any system of organizations (club chapter, locally based non-profits, and franchises, as well as congregations) where there is a unifying structure and culture, and a shared consulting resource. So the scope for application is much broader than religious organizations alone.

Lessons Learned About Blending the Two OD Approaches

We have learned that some of the Diagnostic approaches in our model respond to community needs[xii] and are essential to our success. For example, congregations have limited patience and time for 'process'. Producing specific products along the way (eg a situation analysis, a vision and strategies) maintains momentum and prevents members from dropping out. We have also learned that the quality and commitment of the leadership of the planning committees are a key success factor. Accordingly, we have come to emphasize the importance of the selection of the chairs, and have worked to coach and train them well. Training and coaching are sometimes more associated with expert roles and Diagnostic OD than with Dialogic OD, but Dialogic elements of the SSP are critical as well. Bushe and Marshak have identified three core processes of Dialogic OD[xiii] :

1. Disrupting the ongoing social reality in a way that leads to a more complex reorganization

2. Changing one or more core narratives

3. Introducing or surfacing a generative image that provides new and compelling alternatives for thinking and acting.

The SSP and the TCA disrupt the prevailing general conversation of despair and discouragement, and seek to replace it with one of hope and self-efficacy. The generative image is one of a thriving congregation based on its real situation and possibilities. We know we are disrupting an organization that prides itself in its traditions. Synagogue change-leaders will meet resistance. We have, therefore, worked to make the steering committees and other forums safe spaces and strong containers so they can keep the conversations going at each step of the planning.[xiv] Reframing problem formulations into realistic improvement goals; modeling an appreciative and optimistic attitude (eg focusing on assets and strengths); and modeling and encouraging the inclusion of new voices throughout the process are Dialogic elements we also find to be essential.

Finally, we have learned that no two congregations are alike[xv], that the projects and priorities they choose must arise organically from the process, and that we cannot predict which initiatives will attract the energy and resources needed to be the engine of transformation.[xvi] The bigger implication of all this for OD practitioners is that deciding whether to use Diagnostic or Dialogic methods of OD is not a binary choice. Instead we can experiment with combining methods that best match our clients' situations, and, through reflective practice, evolve with our client systems.

The following adaption of an old Jewish parable yields a clue to what the SSP and the TCA are about:

"The Torah is like a deep well whose waters were cold and sweet and delicious, but no one was able to drink from it. Then a mysterious stranger came along and supplied the well with one cord tied to another, one rope tied to another, and drew water out of the well, and drank from it. Then everyone began to draw water and drink it."

Adapted from Shir HaShirim Rabbah 1.1:8

BIOGRAPHY

Bob Leventhal served as sales and marketing executive for cleaning products company, O-Cedar Brands, for 19 years. He also taught marketing at the University of Dayton. For more than 15 years Bob was a Jewish communal lay leader in Dayton, Ohio.

In 2001 he chose to combine his MBA and his Masters in Jewish Education to create a unique synagogue consulting practice at the Alban Institute in Herndon, Virginia. Alban was a research, publishing and consulting organization that primarily served mainline Protestant congregations.

In January 2012 he became a leadership specialist in the Kehilla Strengthening Department of United Synagogue of Conservative Judaism. He is the principle author, with support from USCJ colleagues, of United Synagogue's Sulam Leadership Curriculum. (http://www.uscj.org/LeadingKehilla/SulamLeadership/default.aspx)

He is also the author of Byachad: Synagogue Board Development and Stepping Forward: Synagogue Visioning and Planning. He is a member of the National Training Labs (NTL) .

[1] **David Kiel** is former steward of NTL's research community of practice. He has been a contributor to *Practising Social Change* and is on the staff of NTL's Writers' Residencies where he and Bob, a long-time friend and associate, began their collaboration on this paper in 2017. However, the work described is entirely that of Bob Leventhal and his Transformation Team at The United Synagogue of Conservative Judaism. David helped situate the case in the context of current OD literature and provided continuing editorial assistance.

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APPENDIX 1:

The Principles and Attributes of the Thriving Congregation Assessment*

Foundational Principle	To what degree does your congregation have?
Develop a shared, compelling vision of purposeful Jewish living	• A participative planning process • A clergy that is trusted, stable and visionary • A commitment to continuous improvement • A clear plan for communicating with the congregation
Engage in reflective and accountable leadership	• Clear job descriptions and reporting lines • Internal and external assessment practices • A process and method for developing new leadership
Manage change and conflict	• An innovative strategic plan • Leaders who are willing to take risks to bring about needed changes • Leaders who have the capacity to manage conflicts and disagreements
Ensure sustainable and sound operations	• Leaders who are committed to transparency in goal-setting and decision-making, and in operations and finances • Written policies and plans for sustainable financial management, membership development, and administrative operations
Welcome participation and connection	• A stated commitment to inclusion • Affinity groups for different parts of the congregation • Processes to recognize and support life transitions • Special programs for children and teens
Motivate deeper engagement in the Torah and Tefila	• Programs about Jewish history, culture and practice • Ongoing groups to support spiritual and ritual involvement • Initiatives that connect tradition and ritual to social justice work
Advocate for prophetic justice, and practice Covenantal Caring	• Activities that deepen connections to Israel • Opportunities for people with different abilities and needs to participate in all aspects of the congregation • Ways of advocating for social justice in the community, in Israel, and around the world

*Leaders can score their congregations on the TCA instrument in about ten minutes during a workshop. They rate how much of each attribute is currently exhibited (a great deal, some, a little or not at all). They are then asked to identify one area of strength (ie where they are 'thriving now') that they can build on. They may also choose to identify an area where they would like to do better, or 'hope to thrive'. We use this form with synagogue presidents for an initial discussion. We also offer a 60-item version that identifies more specific practices which we use with strategic planning teams. The TCA has empowered congregational leaders to develop a shared vocabulary to describe a healthy congregation, and it has helped leaders maintain hope by focusing on what is thriving and how to build on that, rather than focusing only on what is wrong.

APPENDIX 2:

Sulam: The Five Phases and Ten Steps on the Ladder of Congregational Planning

Initial commitment and start-up

1. Top leadership involvement. The USCJ and the Board sign a formal agreement to implement the SSP. The rabbi and the planning chair are required to attend a full day of training.

2. Creating a planning structure and incorporating new groups into leadership. We coach the planning leaders to form an SSP steering committee (SC) with three subcommittee chairs: Data Gathering, Mission and Vision, and Communications. We build the SC into a team to help them create a safe container for the work.

Self-assessment and engaging the community

3. Gathering internal and external data. Planners develop a shared database. They interview the members of the SC, compile a Fact Book, interview community leaders, survey the congregation, and hold community meetings. They conduct interviews of members of the SC.

4. Focus groups and Town Hall meetings. All members are invited to complete the congregational survey and participate in a guided, group interview/focus group. This leads to a community conversation. The 'Town Hall' is an opportunity for any member of the congregation to check in on the process and receive updates on the progress of the planning. Usually one Town Hall meeting and four to five focus groups are held in each congregation. Some have engaged over 150 people.

Making meaning and setting strategic directions

5. Planner assessment: a SWOT analysis. After the SC has completed the TCA and Fact Book, they analyze strengths, weaknesses, opportunities, and threats (SWOT). We make it clear that we expect planners to revise their SWOT (SWOT 1.0, 2.0, etc) as new data is collected. The final SWOT becomes a resource and a means of reality-testing various ideas and approaches.

6. The Visioning process. We invite the SC to develop a rich, detailed portrait of what it would look like if they were successful as a leadership and in each of the areas of congregational functioning. Our visions stay in bullet form until the last stages of the process. This allows them to be more open to revision and refinement.

Increasing engagement through action planning

7. Defining and preparing the taskforces (TFs). We help the SC, Board and staff to define the number (scope) and topics (finance, leadership, communications etc) for the TFs. we try to be attentive to where the energy is for action. We appoint one SC member and one new leader to co-chair each TF. We also assign a staff person to each TF. The planners then generate a vision for each area. We suggest that TFs be made up of representatives of standing committees as well as new leaders who will bring fresh perspectives.

8. Convening a TF start-up meeting. We have developed the 'All-Taskforce Meeting', the goal of which is to orient and engage all the TF members at the same time. The SC shares an executive summary of the data that has been collected, as well as their most recent drafts of the mission and vision work. The TFs discuss the implications of their work in a dialogue with the leadership team. Once launched, the TFs work for 12-16 weeks, usually meeting about four times. They refine the vision for their focus area, write objectives, and

develop recommendations for action using a standard template. They operate in a relatively autonomous fashion and design a lot of their own inquiry process. Transformation Team consultants will provide guidance and coaching to TF leaders when asked. The SC chairs monitor progress.

Creating the Strategic Plan

9. Priority-setting meeting. When the TFs complete their work, they submit their reports to the SC. We then convene a meeting of the SC and the TF chairs. The criteria for prioritization include relevance to the mission and vision, the motivation and energy that is evident for a given direction, the ability to perform, the potential positive impact on the congregation, and the time, personnel and expense required. The result is a challenging, but doable, number of initiatives that the congregation will commit to implementing over the next several years.

10. Writing and adopting the final strategic plan. The SSP helps leaders define a step-by-step process for achieving the goals in each strategic area.   In this way, the final report is a roadmap for implementation. When the report is complete, the SC makes a presentation to the Board and asks for its approval. Once the Board approves the plan and appoints an implementation chair, the planning process ends and implementation begins.

NOTES

i. Bob Marshak, Gervase Bushe and Pat Bidol-Padva were kind enough to comment on an earlier draft of this article. Their input has helped strengthen our positioning of the case study within the Dialogic versus Diagnostic discourse. However, the authors take full responsibility for the analysis and conclusions. Marshak and Bushe are the principal theorists who have formulated the Diagnostic OD versus Dialogic OD framework . A summary of their perspective can be found in *Introduction to the Dialogic Organization Development Mindset* in Bushe and Marshak (Eds) *Dialogic OD* (pp 11-32), Berret Kohler, 2015. Also see *Dialogical Organizational Development* by them, Chapter 10 in *The NTL Handbook of Organization Development and Change*, Brenda B. Jones and Michael Brazzel Editors, Second Edition, Wiley, 2014, pp 193-212. NTL's practitioners' journal, *Practising Social Change*, has published three articles by these authors explicating Dialogical approaches to OD and the differences with earlier Diagnostic approaches: Bob Marshak, *OD Morphogenesis: The Emerging Dialogic Platform of Premises;* Gervase Bushe, *Being the Container in Dialogic OD;* and Gervase Bushe and Bob Marshak, *Transforming Leadership*. These can be accessed from the journal's archive: http://www.ntl-psc.org

ii. Yabome Gilpin-Jackson (2013) *Practicing in the Grey Area between Dialogic and Diagnostic Organization Development: Lessons from a Healthcare Case Study, OD Practitioner*, 45:1, pp 60-66. For an evolutionary perspective on the Diagnostic and Dialogic continuum and how its scope is expanding in response to the 'new OD' see: Kiel, D, *Action Research in Organizational Development: History, Methods, Implications, and New Developments*, in *The NTL Handbook of Organization Development and Change*, ibid, Chapter Four, pp 78-80.

iii. For 11 years previously I had been the one Jewish consultant at the Alban Institute in Washington DC. The Alban Institute, founded by Loren Meade in 1974, provided consulting, training, support and publication services to 'mainline' protestant congregations, pastors and lay leaders. Meade was an NTL member and many of the practices of congregational support were based on applied behavioral science principles. Alban incubated the project that launched the author's work in the UCSJ, and my chances for success were much enhanced by the support and training I received from the Alban team. My original mentor in this work was Gil Rendle, but many other Alban staff members have helped me along the way.

iv. Many scholars have discussed the multiple forces disrupting synagogues: Arnold Eisen and Steven Cohen, in *The Jew Within*, have written about changes in Jewish beliefs and identity. Rabbi Sid Schwarz, in *Jewish Megatrends*, looks at changes in how young Jews are organizing to build community in new ways. While these forces and factors are effecting the synagogues, Jewish communal organizations are struggling to innovate and respond. In his recent book, *Next Generation Judaism,* Rabbi Michael Uram discusses the ways in which core leaders of brick-and-mortar legacy organizations tend to create barriers for engaging new members.

v. A ceremony for teens when they turn 13. They read from the Torah and are considered old enough to be responsible to fulfill commandments.

vi. The term 'problem saturated story' is derived from the narrative-therapy framework as described in *Narrative Therapy in Practice, The Archeology of Hope*, Monk et al, Editors, Jossey Bass.

vii. Appreciative Inquiry (AI) is a method of organizational transformation originally developed by David Cooperider, an NTL Member and Professor at the Weatherhead School of Management at Case Western Reserve University. AI was the first major OD movement to provide a significant alternative to the traditional practices of Diagnostic OD. Many resources on AI are available at the AI Commons. https://appreciativeinquiry.champlain.edu. Our approach also draws on the positive psychology approach pioneered by Martin Seligman, a professor at the University of Pennsylvania. In *Learned Optimism*, p45, Seligman argues that the major difference between optimists and pessimists is how each explains bad events. A pessimist experiences a setback

and ascribes it to 'permanent causes' such as stupidity or ineptitude, whereas an optimist ascribes a setback to 'temporary causes', focusing on context rather than assuming that setbacks are due to immutable and unfixable traits.

viii. A precursor to the TCA was the *Congregational Systems Inventory* developed by Speed Leas and George Parsons. This consisted of seven ten-point scaled items. The TCA also draws on my years of work with Congregations with Alban and the USCJ as well as from the work of the United Jewish Appeal Federation of New York such as, Sacha Litman's *Measuring Success*, and change-management processes like 'Synagogue 2000' and 'Synagogue 3000' (captured in the book *Sacred Strategies*).

ix. Early examples include Blake and Mouton's organizational excellence process reported in their volume in the Addison Wesley Series on OD, and Litwin and Stringer's Organizational Climate Instrument. The most famous recent assessment-driven change effort is the 'Balanced Score Card'.

x. Though we do not yet have a formal evaluation of the SSP, we have observed the following general results:

- 25 of 30 congregations have completed a written plan.
- The plan has created specific goals to work on and actions to track.
- This has made some Boards more results-oriented and accountable.
- Most have begun to implement some of their recommendations.
- Congregations have been able to manage conflict, and move forward.
- Many congregations have discovered new lay leaders.
- Leaders say their participation has been a highly meaningful volunteer-experience.
- The SSP has provided training for new leaders.
- Presidents report their jobs are more manageable and it is easier to find successors.

xi. We are indebted to NTL member, Pat Bidol-Padva, for reminding us of these efforts including, but not limited to:

- The JECEI: The Jewish Early Childhood Education Initiative
- The Mandel Project: A synagogue-based school enhancement initiative
- Project Kavod: Improving the Culture of Employment in Jewish Education
- PEGE: Partnership for Excellence
- JESNA: Redesigning Jewish Education for the 21st Century

xii. Within the SSP can be found elements of traditional strategic planning: see John Bryson, *Strategic Planning for Non-Profits, Fourth Edition* (2011).

xiii. See: Introduction to the Dialogic Organization Development Mindset, in Bushe and Marshak (Eds.) *Dialogic OD* (pp 11-32).

xiv. See *Being the Container in Dialogic OD* by Gervase Bushe in *Practising Social Change*.

xv. Some congregations are mature and complacent. Other synagogues are at a lifecycle-stage of decline due to some long-term forces and factors of stress we mentioned earlier. These congregations might be described as 'unsuccessful', 'despondent' or 'depressed'. Some of these, perhaps about 20%, are in a state of nostalgia, where they are making no effort to re-imagine and/or redevelop their community. Some are in crisis. Others are in a state of collapse.

xvi. There is a growing body of experience and thinking that suggests that focusing on a few areas of strength that are integral to the identity of the social unit is a very promising strategy for ultimately encouraging development in a variety of areas, beyond the selected target, and affecting a major, positive transformation of the whole system. In *The Power of Habit,* Charles Duhigg describes how he transformed the culture of Alcoa by focusing on safety. His insight is echoed throughout the literature on organizational strategy and improvement in frameworks such as Michael Porter's *What is strategy?* in terms of "finding comparative advantage"; Jim Collins's *Good to Great* ie "find the flywheel"; Tregoe and Zimmerman's concept of 'Driving Force' in *Top Management Strategy*; and the Strategic Compass Approach which focuses on "amplifying what you do best".