

SYNERGY



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Vision and Data: Essential Building Blocks for Successful Synagogue Change

Vision and Data: Essential Building Blocks for Growing Synagogues

“In a 25-year pulpit career, I have never seen a more transformational synagogue consultation. We studied ourselves with painstaking, unapologetic, and at times exhausting rigor, but came out empowered. Armed with, and enlightened by, the data, we were able to confidently initiate major changes with the knowledgeable support of our entire and very diverse community.”

—Rabbi Sam Weintraub
Kane Street Synagogue

“Our congregation’s leadership engages in ongoing discussions regarding how to best spend our resources to fulfill our mission. I now understand that we have been acting in a bubble, often divorced from the needs, desires, and perspective of our membership. Measuring Success compiled a comprehensive array of data about the effectiveness of our programmatic and staff expenditures, and equally important, helped us understand and analyze it. We learned where we were fulfilling our expectations and where we have fallen short. Thanks to this initiative, Temple Sinai is now poised to set more appropriate and necessary programmatic priorities, based on data and reality.”

—Rabbi Michael White
Temple Sinai of Roslyn Heights

The Process

- Collect survey data from congregants.
- Collect detailed financial data including allocation of clergy and staff time (activity based accounting).
- Evaluate alignment of synagogue vision with congregant feedback, allocation of clergy, staff focus, and financial resources.
- Develop and implement action plan.
- Repeat survey to evaluate impact on congregation.

The Participants

- Two cohorts of six synagogues each from 2009 through 2012
- Across denominations (Reform, Conservative, Orthodox, unaffiliated)
- Across size (200 to 2,000 members)
- Across locale (Urban: Manhattan and Brooklyn; and Suburban: Westchester and Long Island)

These are the voices of synagogue leaders whose congregations participated in a project on Sustainable Synagogue Business Models. Overseen and funded by UJA-Federation of New York and facilitated by Measuring Success consultants, the goal of the project was to empower synagogues to develop more sustainable models for the 21st century. The process gave synagogues tools to gather and use data to support vision-aligned decision-making. The results helped synagogue leaders think about and develop action plans to address some of today’s tough questions: Is our current dues-based funding model financially sustainable? Can we more effectively engender the sacred community we envision? Is it possible to maintain and even grow our congregation, rather than lose members? Can our board develop and implement purposeful strategies for change toward sustainability and growth based on shared knowledge rather than individual guesswork?

“The process of quantifying and evaluating data enables our board and membership to identify areas of need and appreciation. We feel that we now have a reliable road map to advance our mission and better serve our members and broader community.”

—Virginia Bayer, Board President
The Jewish Center

As the project concludes, it is time to share this work and the lessons that have been learned. Synagogue leaders, movements, and all who work to strengthen synagogues, have much to gain from understanding this process of testing hypotheses against data, from hearing what leaders of participating synagogues have learned that has ramifications for all synagogues, and from learning how all synagogues can begin to develop capacity for data-informed decision-making.

Conceived in 2008 in the first shock of the economic downturn and continuing through June 2012, the Sustainable Synagogue Business Models project was pioneered by 12 diverse New York synagogues.¹ The process each followed was outlined on the previous page.

Drawing on the business analytics approach already used for day schools, federations, Jewish community centers, and Hillels, Measuring Success created a set of analytical tools targeted for synagogues:

- ✦ Surveys related to the synagogue and its activities to capture the voice of the community.
- ✦ Financial analysis using activity-based accounting to make the budget a planning tool.
- ✦ Resource tracking to analyze how leaders use their time.
- ✦ Constituent tracking to observe how synagogue participants move from one program or life stage in the synagogue to another.

The consultants then worked with synagogue leadership to share findings, interpret results, generate action plans, and guide progress. The consultations enabled each synagogue to explore the alignment between its strategic vision, congregants' expressed wants and deeper needs, resource allocation, and financial viability. Understanding where there was misalignment enabled leaders to make changes to foster stronger community and greater participation, and increase financial sustainability.

¹Synagogues included B'nai Jeshurun (Manhattan), Central Synagogue (Manhattan), Community Synagogue of Rye, Greenburgh Hebrew Center, East Meadow Jewish Center, Huntington Jewish Center, The Jewish Center (Manhattan), Kane Street Synagogue (Brooklyn), Kolor Chayeinu (Brooklyn), Temple Shaaray Tefila (Manhattan), Temple Sinai of Roslyn Heights, and Westchester Jewish Center.

Anecdotes and Data Tell Different Stories

Synagogue leaders were consistently surprised to find that many of their assumptions about congregant views were not in fact widely shared by the congregation. Using the in-depth survey developed with their input, synagogue leaders were able to test the hypotheses and assumptions on which they were basing key programming, resource allocation, and revenue enhancement decisions. From which programs effectively deepened engagement, to which segments of the membership were most or least enthusiastic, to which program areas are really making and losing money — anecdotes gave way to a shared understanding based on data. One synagogue was surprised to learn that wealthier members are less satisfied than their moderate-income families, while another learned that their bar and bat mitzvah program is perceived to be among the weaker programs offered. A finance committee chair felt strongly that the synagogue was financially breaking even in adult education, only to learn they are actually running a significant deficit when the cost of the adult education program was accounted for using a more functional approach to accounting allocations. Each of these reality checks has implications for how a synagogue board allocates resources of time and money.

Predicting a Synagogue's Success — “Promoter and Growth Scores”

Yes, success can be measured. Most every synagogue would like to see growing membership, deepening engagement, and a growing budget. But growth in numbers and budget is a *lagging indicator*, meaning it can only be measured after it occurs. The challenge was to uncover *leading indicators*, factors that predict growth. Cholesterol level, for instance, does a decent job of predicting likelihood of heart health. No predictor is perfect, but they are the only way to know if we are on the right road.

The project utilized two types of *leading* outcomes: overall satisfaction with the synagogue (satisfaction in meeting explicit “consumerist” needs; e.g., education for children, High Holiday services), and personal growth through the synagogue (loftier outcomes based in mission and fulfillment of latent congregant need).

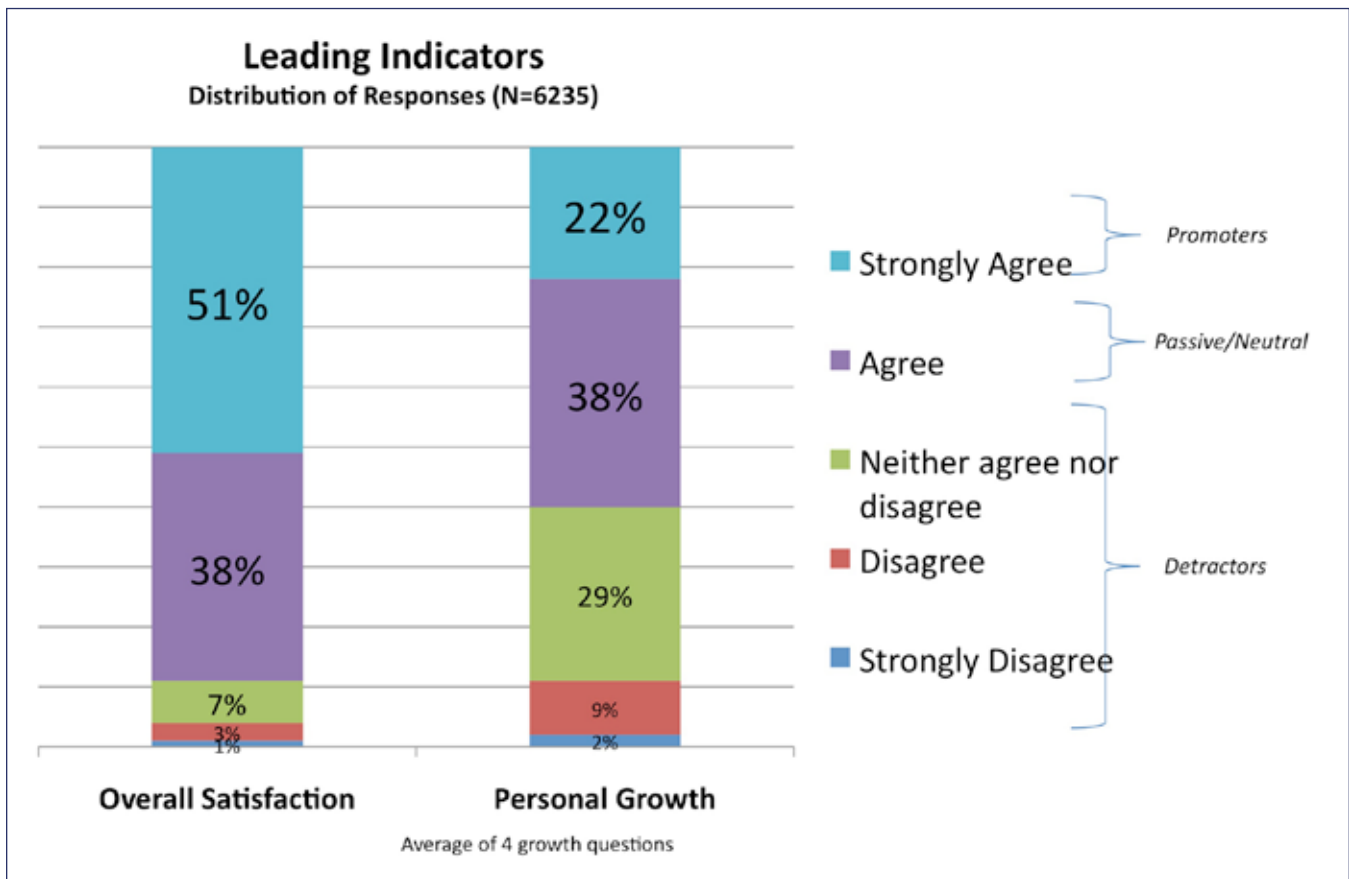
For *overall satisfaction*, the consultants adopted the question proven across multiple sectors and industries (nonprofit and for profit) to be the best predictor of future growth and retention: I would recommend this synagogue to a friend. On a five-point scale, from Strongly Disagree to Strongly Agree, an aggregate 51 percent of all participating synagogue respondents strongly agreed. This figure, known as the promoter score, aligns closely with comparable data in other membership organizations like JCCs.² At the other end of the spectrum, about 10 percent of respondents were “detractors,” meaning they answered in the lowest three points of the scale.³ Perhaps not surprisingly, this figure aligns closely with the actual membership attrition rate in the synagogues, and thus represents those who are likely to leave the synagogue.

Personal growth indicators were more complex. A few different questions were asked to determine when synagogue members felt that they were growing spiritually,

intellectually, and as members of the synagogue community. When the responses were aggregated, 22 percent of all congregants strongly agreed that the synagogue was impacting their personal growth as a Jew. Not surprisingly, those congregants were also disproportionately strong promoters of the synagogue overall.

Key Levers for Success Across All Synagogues

What characteristics of synagogue life predispose a respondent to feel satisfied and to feel that he has grown as a Jew? Analyzing data gathered from over 6,000 congregants among the 12 participating New York synagogues uncovered five elements that consistently correlated with high promoter scores and, in three cases, also correlated with strong personal growth as a Jew. Unlike other characteristics of synagogue life, these matter to congregants of synagogues of all kinds; it is here that synagogue leaders can invest energy and expect to have significant impact on outcomes.



²JCC Excellence: The Benchmarking Project conducted by the Jewish Community Centers Association reports a consistent promoter score just under 50 percent.

³Effectively the midpoint of the scale is “Agree” since on most questions about 40 percent of respondents fall into this camp, failing to provide as much insight as promoters and detractors.

Drivers for Overall Satisfaction and Personal Growth

(in order of relative strength)

- Vision and values of synagogue resonate.
- Rabbi's vision of Jewish life resonates.
- Meaningful social connections developed.

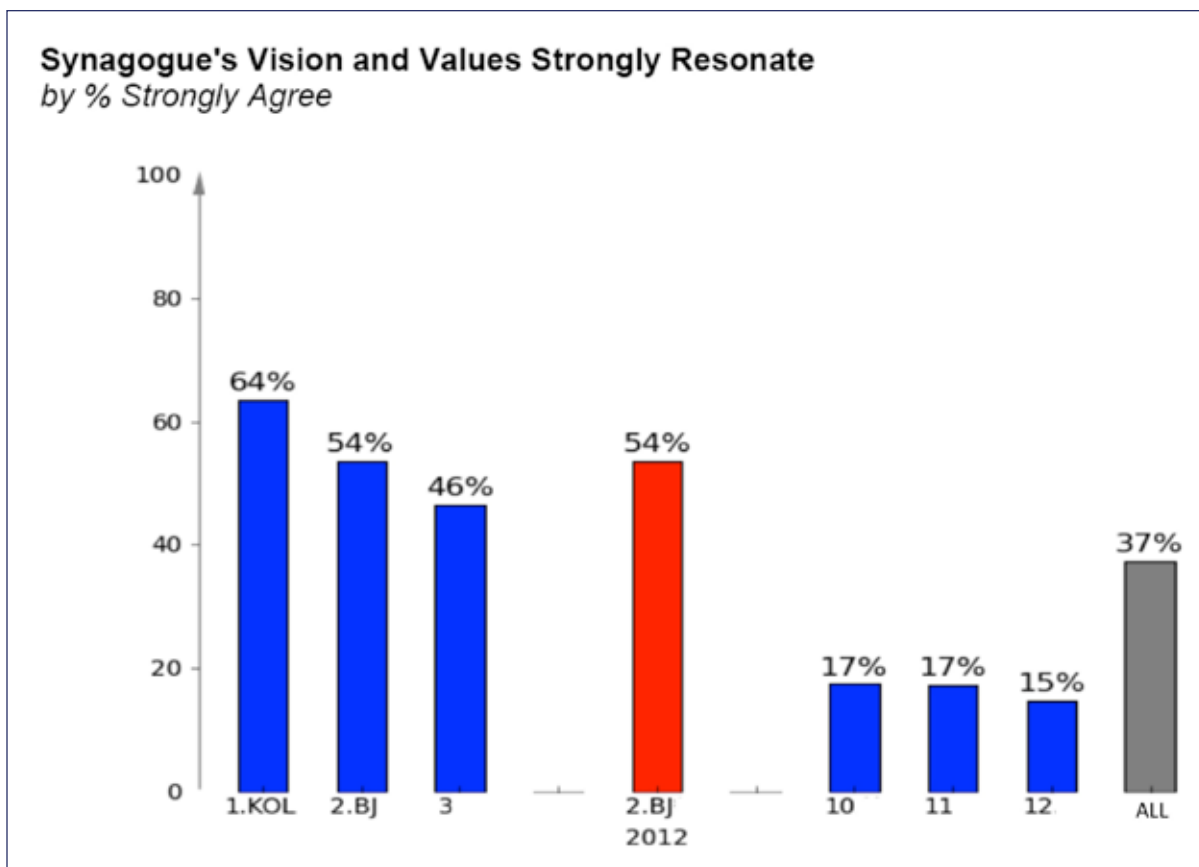
Drivers for Overall Satisfaction Only

- Welcome by rabbi(s) felt.
- Information is easy to find.

Vision and values matter! The top two drivers of both overall satisfaction and personal growth were the degree to which a congregant resonated with the vision and values of the synagogue and the degree to which the congregant found the rabbi's vision of Jewish life compelling. Interestingly, respondents made a distinction between these two; however, taken together, there is no question that a vision that resonates is not just a "nice to have," but a "need to have."

Kolot Chayeinu members "...are creative, serious seekers who pray joyfully, wrestle with tradition, pursue justice, and refuse to be satisfied with the world as it is..." (Mission and values excerpt from Kolot Chayeinu's website.)

As you can see,⁴ synagogues range widely in terms of their promoter score from a low of 15 percent to a high of 64 percent. Here, Kolot Chayeinu (KOL in the first column, a growing independent congregation in Brooklyn with over 350 individual members) and B'nai Jeshurun (BJ, an 1,800 household synagogue on Manhattan's Upper West Side) had the highest scores. On this question, as on all others, the top performing synagogue was rarely surprised; it had an intentional strategy, in this case to define and communicate a specific vision and set of values. As Kolot Chayeinu's leaders explained, "Our vision is not just words on paper. We live Kolot's mission and values in everything we do, from High Holiday services, requests for contributions, budget reports, the website, and prayer book purchase; to affiliation decisions, our programs, and community life."



⁴The project used charts like this so synagogue leaders, in this case from B'nai Jeshurun, could evaluate their performance relative to the others; each bar in the chart reflects the percentage of one synagogue's congregants that strongly agreed to the specific question asked or statement made. The high performer is identified as a model for best practice. The grey "all" bar at the end indicates the average score for all synagogues compared in the chart.

Understanding the implications of their relatively high scores, leaders of other participating synagogues were eager to learn from Kolot Chayeinu's and BJ's demonstrated best practice in this key area, not only what they do, but the process they engaged to accomplish it. Similarly, other synagogues stood out on other parameters where their data-tested best practice was similarly shared with the wider group.

Meaningful connections matter. Another significant driver of both overall satisfaction and personal growth is the degree to which meaningful social connections are fostered. A number of synagogues, as demonstrated below, intentionally increased the opportunity for social connection in priority activity areas to good effect.

Accessibility matters. Two other questions in the survey uncovered significant drivers of overall satisfaction, although they did not affect personal growth: "The rabbi(s) make me feel welcome," and "The synagogue makes it easy to find information about programs and other questions I have." Again, learning the approach of high scoring synagogues and attending to these elements in the design of implementation plans afforded synagogue leaders the opportunity to improve general attitudes of their members toward the synagogue.

Using Data to Guide Effective Change

What is clear so far is that using robust data to benchmark performance across synagogues can uncover information that is useful to all. But how can a particular congregation prioritize and plan for change? Each participating synagogue was also able to use its data set in multiple ways for its own unique planning purposes as leaders focused efforts on one or more priority areas of activity identified in the survey.⁵

- As we've seen, **benchmarking** relative to peer groups of other synagogues (based on size, movement, community, or urban/suburban) enabled leaders to learn from the data-affirmed "best practices" of others.
- Using their own synagogue's **survey data**, leaders could make comparisons among activity areas or understand variations in experience or attitude among different synagogue demographic groups (by age, income, program attendance, etc.) to gain reliable guidance in setting priorities and planning effective changes.

B'nai Jeshurun "...is a passionate Jewish community that inspires spiritual searching, lifts the soul, challenges the mind, and requires social responsibility and action..."
(History and vision excerpt from B'nai Jeshurun's website.)

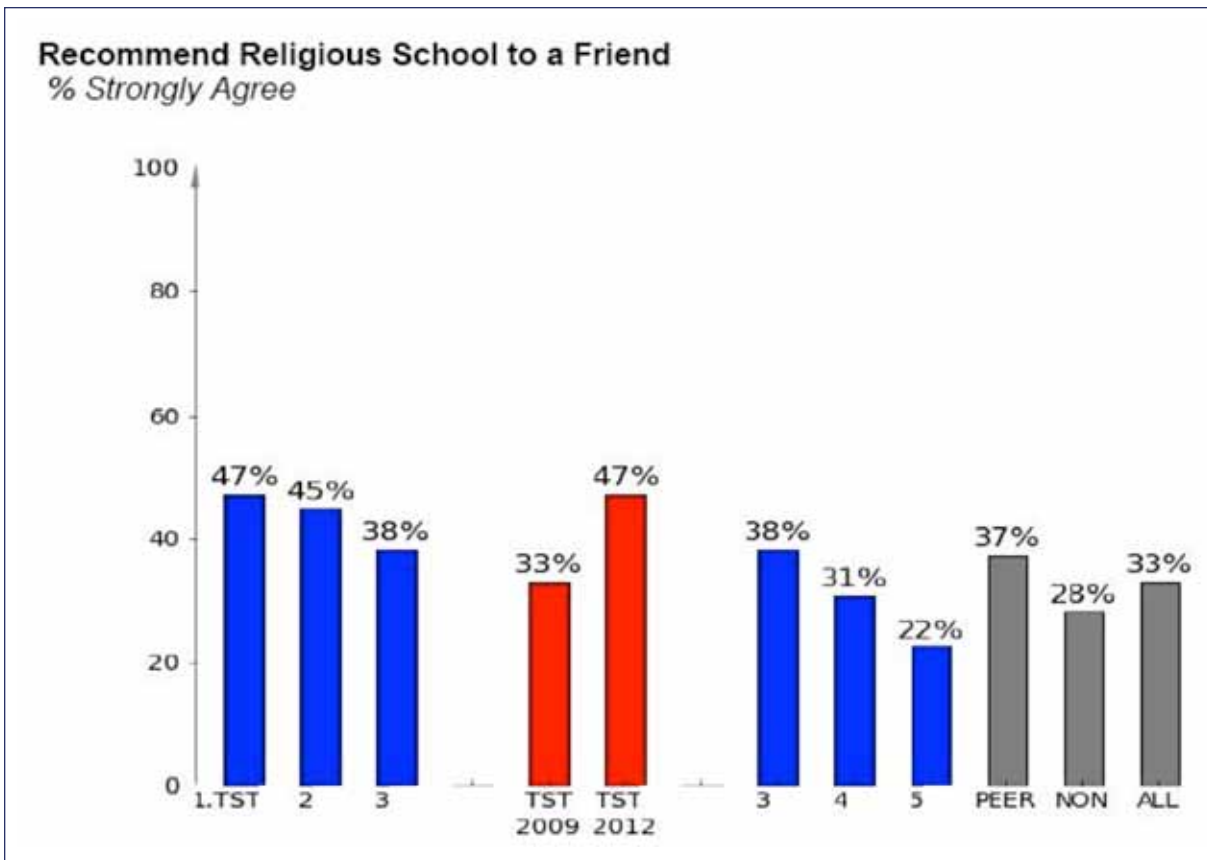
- Periodic repetition of surveys was an effective accountability tool that provided a **longitudinal measure** of the impact of adopted strategies and opened the way to further efforts.

Temple Shaaray Tefila (TST), a 1,500-household Reform congregation on the Upper East Side of Manhattan, utilized all the tools available to them to make a significant difference in overall satisfaction among their religious school families.

While outscoring their peers in 2009 in the promoter score (likelihood to recommend) among their religious school families, leaders saw that in fact this score was among the lowest in comparison to other Temple Shaaray Tefila activity areas. Having committed considerable resources to their religious school and taking pride in its innovative accomplishments, the board was concerned and decided to prioritize increasing this score.

Like many of the synagogues in the program that undertook a subsequent "deep-dive" survey in one program area, Temple Shaaray Tefila surveyed school families to test several hypotheses about where problems were occurring and what they could do to improve. That led to a multipronged implementation plan, including integrating opportunities for social interaction among parents into existing programs, initiating grade parents to invite and welcome other parents to class activities, and assigning a rabbi or cantor to grades six and seven on a pilot basis to deepen relationships — all to leverage key drivers of community building and clergy welcome. In addition, they dramatically reduced fees for their high school program to align with the priority of retaining families following a bar/bat mitzvah. At the same time, they increased the fees charged through grade seven, while improving flexibility for families by introducing a Hebrew tutoring option. When congregants took the survey again in 2012, leaders saw a significant increase in their score — moving Temple Shaaray Tefila all the way to the top rank in its new peer group of large congregations.

⁵The survey developed by Measuring Success with input from synagogue leaders included blocks of questions on activity areas such as early childhood, religious school, youth, adult education, Shabbat, High Holidays, social action and chesed, and pastoral counseling. This enabled leaders to assess and leverage change in individual program areas to align vision, resources, and congregant outcomes.



Internal benchmarking showed them where improvement was needed; survey data enabled them to test hypotheses and undertake effective change; and longitudinal data⁶ provided the board with a measure of accountability and showed their success, leading to an extension of pilot efforts and setting a new bar for other congregations to meet.

“We had tried social programming in the past but never got the turnout we hoped for, which led us to conclude (wrongly) that people did not want to make social connections through the Religious School. Measuring Success helped us develop a targeted follow-up survey to probe deeper about social connections. That led to an “aha moment” when we learned that people do want to make social connections, they just do not want us to add new events to their calendars. When we realized that, we took steps to build socializing and community-building into existing events.”

—Barri Waltcher

Vice President and Chair of Religious School Committee
Temple Shaaray Tefila

Activity-Based vs. Functional Budgeting: Gaining Leverage for Planning

Leaders of all participating congregations found that analyzing and presenting their budget by activity areas such as High Holidays or youth activities rather than by function, such as building expenses and salaries, gave them newfound leverage in strategic decision-making.

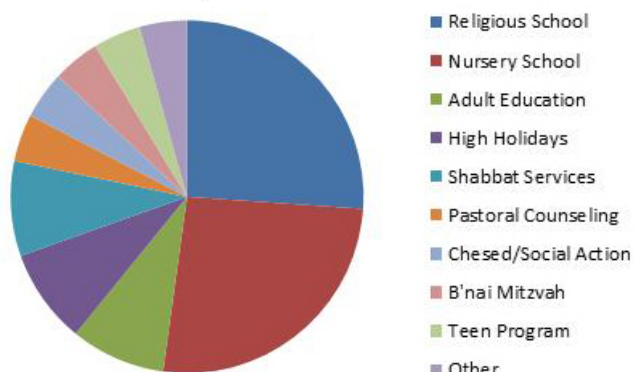
To properly apply activity-based accounting, it was necessary to evaluate the allocation of staff time and building space as well as direct expenditures (food or teacher salaries, for example) against the various aspects of synagogue activity. (For example, if the rabbi earns \$100,000 per year in salary and benefits from the synagogue and spends approximately 10 percent of her time in a given year on Adult Education programs, then, using this approach, the Adult Education program is incurring a \$10,000 expense.) The same activity-based accounting discipline was also applied to the synagogue’s revenue, so that allocation of general membership and voluntary contributions was assigned

⁶In the chart above, Temple Shaaray Tefila’s (TST) longitudinal scores are compared against a 2012 peer group of four other large congregations. The three gray bars are averages among (from left) “peers,” just large congregations, “non” peers (smaller congregations), and “all.” The two red bars in the center show a longitudinal comparison for Shaaray Tefila.

Sample Synagogue Budget: Expenses



Sample Synagogue Budget Using Activity Based Accounting



based on participation levels in various activity areas, ranging from clergy counseling to teen programs. Any direct fees were also applied to the specific service area.

The charts above illustrate in simplified fashion the functional expense budget of a typical participating congregation and that same budget presented in an activity-based budget.

For all synagogues in the initiative, this was a big change. What resulted, however, was a new appreciation of the true cost and revenue stream for each area of activity. Board members gained a common understanding of how their use of resources reflected their vision. Where they saw that vision and resource allocation were not in alignment, they were able either to make adjustments or to explain clearly to congregants the mission-related reason a particular activity required or provided subsidy.

Financial Sustainability

On a basic level, what ultimately enables a synagogue to sustain and even grow itself are the funds it brings in through various revenue streams: membership dues, voluntary contributions, program or rental fees, and endowment — the building blocks of synagogue funding models. Here again, through the tools of business analytics, synagogue leaders gained insight that provided leverage for effective change, particularly in the essential areas of dues and contributions.

“Presentation of our data to the board had an immediate impact. Just after that meeting, we had a dues meeting and much of the discussion was already enriched by empirical data we had gathered on the subject. We immediately saw how this new, credible source of insight could assist us in making difficult decisions.”

— Jeannie Blaustein
Board President, *B'nai Jeshurun*

Membership dues

Not surprisingly, congregants across all synagogues who expressed overall satisfaction with the synagogue (reflected in the promoter score discussed above) also tended to strongly agree that they received good value for their membership dollar. Interestingly, data analysis revealed that this sentiment was not related to the actual amount paid; it's a feeling of satisfaction with the value of their affiliation that matters as a leverage point, rather than particular dollar amounts. Further, a key component of feeling positively about membership value is the perception that the budget is managed effectively for the health of the congregation. And related to that is transparency in how dues are used to support the activities of the congregation.

The board of one synagogue that scored relatively low on its congregants' perceived value for the membership dollar (Syn X) chose to focus on raising this measure. The strategy they initiated was regular communication in multiple venues about how budget dollars were acquired and allocated. This, perhaps, seemingly small change resulted in significant improvement in both scores.⁷

⁷An 8 percent or 10 percent point increase is statistically significant, and did not occur for other synagogues that did not focus on budget transparency.

Voluntary contributions

Across all congregants surveyed, the willingness to continue or increase voluntary contributions was highly correlated with transparency in how the board manages the congregation's budget, further underscoring the value of a board focus on transparency. For example, among all members who strongly agreed that the synagogue manages its budget effectively, 84 percent agreed or strongly agreed to giving a voluntary contribution at or above their current level. Conversely, among all members who strongly disagreed that the synagogue manages its budget effectively, only 48 percent agreed or strongly agreed to giving a voluntary contribution at or above their current level.

“The work we began with this program, and are continuing, has helped us develop facility with the tools necessary to understand the voice of the community in a way that can be used quantitatively via the survey, and helped us gather and interpret resource allocation information in a more meaningful way. Together, they support and reinforce all parts of the planning wheel.”

—Seth Berger, Board Treasurer
Central Synagogue

Strategies for Aspiring Synagogues

It is clear that robust data is an indispensable tool for synagogue leaders as well as those in the wider field of synagogue support as they seek to create effective, measurable strategies to build and sustain the sacred congregations they envision.

Findings from the 12 New York synagogues in the Sustainable Synagogue Business Models project suggest a number of strategies that any synagogue can build upon, from articulating and living by compelling vision and values, to ensuring transparency in budget management. It is also clear that the discipline of developing and using data calls for a culture change along with new tools and skills in congregations.

Use Data for Appropriate Purposes

Data does not dictate direction; rather it helps to frame alternatives. Whether drawn from a survey, the budget, or the database, data represents an objective picture of the current state of the congregation. The task of leaders is to look at the data and see if it aligns with goals. For example,

one synagogue the consultants worked with thought the Early Childhood Center generated the most loyalty toward the synagogue and thought it was generating a surplus; the data showed just the opposite. That's where the planning began. There were several choices the synagogue could make to align vision and resources: revise its expectations of the Early Childhood Center, hold the program accountable for better results, raise prices, decrease expenditures, etc. Think of the data as a mirror to the vision. Respect the power of data to show the present, hone vision and goals to illuminate the future, and take responsibility for navigating the path from one to the other.

Begin to Adopt the Right Tools

The tools described in this paper form the three legs of a tripod, each of which contributes an essential element to effective data-informed, vision-aligned decision-making. Each tool can be used at various levels of sophistication; what follows are some recommendations on how to get started.

1. Surveys are critical for channeling the voice of the community and enabling leaders to distinguish between an anecdote and a representative trend as they direct energy for change. Modern survey technology makes it fairly easy for a synagogue to run a survey, but useful results will need careful planning and can benefit from the advice of an expert. Surveys like the one developed for this project can be comprehensive tools for capturing the overall voice of the community; they can also be just a few questions that address a very specific topic. Most importantly, surveys should be repeated every one to two years to get a sense of longitudinal improvement, as well as benchmarked against some norms like those reported here. Important tips, regardless of survey length: get actionable data; hypotheses being tested must be clear as the survey is constructed; and sufficient time must be committed to analyze, benchmark, and interpret the results, before reporting them out.
2. Activity-based accounting enables responsible managerial decision-making. It represents the true cost and revenues of a given area of synagogue programming and, unlike the functional accounting utilized by most synagogues today, enables strategic decisions to be implemented to better align the value placed on a given activity and its outcomes related to its goals. While a full financial analysis like those used with synagogues in this project

is time intensive it is possible to begin more simply. First, estimate direct expenses (e.g., teacher salaries for religious school) by program. To estimate one of the prominent indirect expenses, have staff or clergy fill out a basic timesheet, estimating their time in relation to the various program areas. Then assign their proportional salary to each program area, and ultimately add it to the direct expenses already tallied. This exercise provides a better sketch as to how much your various activities actually cost. Similar processes can be used to estimate true revenues — fees, plus the appropriate proportion of fundraising and membership dues.

3. Tracking member and nonmember participation in synagogue activities over time is a database function critical to understanding actual outcomes for congregants related to goals set by clergy and lay leaders. The consultants were surprised to find that participating synagogues were unable to answer fundamental questions like, “What percentage of early childhood families are still members of the synagogue when their child reaches bar mitzvah age?” or “What percentage of families are still members of the synagogue after their youngest child completes bar mitzvah?” or “What percentage of religious school families are also using the adult education program?” Faithfully tracking and recording attendance data will surely require appropriate tools; its impact can only be felt if synagogue leaders review regular reports on key metrics and make appropriate decisions based on the data. To start this process, identify one or two activity areas (e.g., adult education) where key metrics are desired and begin logging relevant participation information on a regular basis, using it to inform board decision-making. An important tip for success: only present succinct graphic reports to your board, otherwise they will get overwhelmed by unnecessary details.

Support a Data Informed Culture with Professional and Lay Data Champions

To successfully implement data-informed, vision-aligned decision-making, we found that synagogues need both a professional and a lay person who have the skills (or training) to reference, interpret, and present the data. Culture change is difficult and the default setting for many boards and committees is to use anecdote in decision-making. Over the three years of the project, several participating synagogues made shifts to support their new way of working: some hired an executive director with data

or business backgrounds, others hired a data specialist to support the executive director, and in one synagogue the associate rabbi drew upon his passion for mathematics in college to become the champion. On the lay side, many synagogues found the project offered an opportunity to involve a congregant who had a strong background in business, data, or analytics. In several instances, the lay data champion was someone who was not previously on the board, but by the end of the project became one of the most involved lay leaders in the synagogue.

Prioritize Areas for Change and Use Data to Measure Progress

How can a board hold itself accountable for advancing the synagogue’s mission? Rather than taking on everything at once, the consultants encouraged boards to draw on their own data and on their standing related to peer benchmarks to choose three to four areas where the data and vision were not aligned to focus their efforts. The boards chose a measurable goal (for example, a 10 percent improvement in strength of social community score), some general strategies and the people responsible for leading the change (welcoming committee), and a timeframe (two years). By running the Measuring Success survey tool again two years later, boards were able to hold themselves accountable measurably for achieving the change or not. In either case the data revealed new opportunities for assessment and future action.

When the Children of Israel are numbered for a proper purpose, their numbers are preserved; but, when they are not, their numbers are diminished.

—Numbers Rabba 2:17

The health and vibrancy of congregations is a mandate shared by synagogue leaders across the spectrum. Drawing on the analytical tools that contemporary businesses use to their advantage, synagogues and their leaders now have the opportunity to apply data-informed decision-making to help fulfill their mission and grow their congregations.

Acknowledgements

This paper is the culmination of three years of learning along with the 12 New York synagogue pilot sites. Through this process, synagogue leaders engaged in data-informed, vision-aligned decision-making, toward the goal of a more sustainable synagogue model.

We would like to thank each of the synagogue leaders that participated from the 12 synagogues involved in the project. While we cannot name you, your time, dedication, and insights to this project have been invaluable to our learning.

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Measuring Success is a consulting firm which uses quantitative modeling, measurement tools, and consulting services to help synagogue and not-for-profit organizations' boards and professional leaders increase mission impact and financial sustainability by moving from anecdotal to data-drive decision making. Measuring Success' efforts have supported foundations, federations, day schools, community centers, synagogues of all denominations, churches, campus organizations, advocacy, and health care. Sacha Litman is Managing Director and Founder of Measuring Success.



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