



# Na'aleh

THE HUB FOR LEADERSHIP LEARNING

## 5 Strategies You Must Consider

*as you navigate this uncharted terrain and seek to pivot your synagogue or communal organization toward growth.*

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### SEEK TO UNDERSTAND

There's an old teaching adage that says "Seek to understand before seeking to be understood." The same goes for leading organizations. Before convincing your members (or customers, clients, or congregants) about the benefits of your programs and services, you should seek to understand their needs and aspirations. You should try to understand the "job they want done" by "hiring" your organization.

This cannot be achieved simply by sending out a survey, asking them about their satisfaction with prior programs and what they would like to see in the future. This is offering a technical solution to an adaptive problem, defined as a challenge with no discernible solution requiring you to constantly learn and adapt your responses. Today, we are experiencing adaptive challenges. To address them, you need to nurture a stance of continual inquiry, a burning desire to understand your members' perspectives, and a humble recognition that you truly don't fully comprehend what they are seeking from you.

To learn how McDonalds discovered the job their customers want their milkshakes to do for them,

watch this 7 minute video [here](#) or read the brief article in Harvard Business Review (HBR) [here](#) by Clayton Christensen. Following McDonald's lead, you may discover that the business you think you're in is not the way your members see it. And, thus, you may not be aware of all the opportunities available to your organization for growth.

Four considerations when seeking to understand the jobs your members want done:

- Don't ask them about you and what you can do for them. Ask them about what they care about and what they seek when they come to you. Show that you truly want to understand them.
- Make sure you are reaching out to all members of your organization. And, be especially cognizant of those on the margins of your community, because that's often where innovative ideas come from.
- Don't do it all yourself: engage your members in reaching out to one another. In this way, you are strengthening your entire community by weaving together a web of relationships across the various micro-communities of your synagogue or

communal organization.

- Finally, give back. This means that as you learn more and more about the jobs people want done, feed this information back into your community. This will trigger new thinking and inspire members to keep reaching out to one another.

By simply having these ongoing conversations, you are hopefully achieving one of your primary goals – to strengthen mutual understanding and a sense of community among all your members.

### LET GO TO LET COME

Now that you know better the jobs that your members want to get done, empower them to figure out with you and each other how best to get those jobs done. The typical response of synagogues and other communal organizations is to have the professional team design programs or services that will meet their members' needs. That's the supposed value of the professional team and what we professionals have been educated and trained to do. But, instead, what if your primary job was to empower our members and equip them with the resources of the organization to co-design programs and services?

One of our core beliefs at Na'aleh is that anyone can lead at anytime from anywhere. Living in accordance with that belief is not so easy. As with all 5 strategic considerations presented here, we (at Na'aleh) struggle, in particular with letting go of control to let the ideas and energy of others rise up. Yet, when we do this, we unleash untapped potential and increase the opportunities for our "members" to accomplish their missions through us.

Imagine the possibilities if our organizations were not limited by the available time and energy of our professionals. Instead of just offering one prayer service on Shabbat, synagogues could offer multiple

opportunities for spiritual elevation. Instead of offering (for example) just one arts series, our communal organizations could run multiple programs across the various arts simultaneously. By becoming a platform for our members to co-create programs and services, we not only increase participation opportunities for our members, we enable our members to fulfill their aspirations to create and serve. To learn more about shifting to a platform model, read this [article](#) authored by Lisa Colton, Miriam Brosseau, and myself.

As with all change, there is loss. You may fear that if you turn over control to others, your organization may no longer be delivering "excellence." Of course, there are times when we do need the expertise of the professional, but likely not as often as we think. We need to find a better balance.

Shifting from a program delivery to a platform model changes the job of the professional, which is now to empower and guide others in design and delivery. As a professional, your main role is that of teacher, facilitator, and coach. This new model of the professional is not strange to those trained as social workers or as progressive educators and rabbis. Value comes from the process more so than the end product.

The actual goal is to foster successful co-creators. "Excellence" is then found in the quality of the relationship between professionals and volunteers, as the latter takes on the roles previously reserved for professionals.

Moreover, this idea is not foreign to Jewish life. Havurot are essentially platforms for small groups of people/families to come together and program for themselves. And, in today's uncertain times, the havurot model also offers a potential guide for how we can "open up." We have discovered over the

last several months the opportunities that online programming and services can deliver, but not every job can be done well virtually. We will need to gather together once again – to learn, to pray, to console, to heal, to explore, and to renew our friendships. Yet, we are rightfully cautious not to gather in large groups. Thus, gathering in small pods (havurot) offers a potential alternative that maintains the benefits of social distancing while expanding the number of those in one’s circle of seclusion. Moreover, it avoids the challenges of open/closed models, in which if an outbreak occurs we must close the entire school or camp or program. Rather, we only need to temporarily suspend the havurah or pod in which the outbreak occurred, while the rest can continue onward. This is not a panacea but one important consideration as we change course.

### ***ALIGN YOURSELF TO THAT WHICH IS EMERGING***

As you shift to empowering members to co-design and co-lead the programs and services of your community, there is the risk of mission drift. People will co-op the resources for their own purposes (to get their jobs done), which is exactly what we are trying to nurture. Yet, those purposes at times may go too far afield and may even bang up against one another as members have different opinions and aspirations.

Thus, it is vital that you continually emphasize the core mission of your synagogue or communal organization. This is your “why.” It is your reason for being. And, it should not be confused with “how” you go about fulfilling the mission or “what” programs or services you offer to do so. To understand these differences more clearly, watch a clip from Simon Sinek’s TED talk [here](#).

Empowering members to create new “whats” while keeping to your core “why” will move your

organization out of inertia, helping you discover new and better ways to achieve your mission. And, as for the “how” – by weaving together the community through deep conversations and empowering them to create their own programming – you are fostering a “how” for your organization that should powerfully deliver on your “why.”

Yet, solely refocusing on your mission is insufficient. From a strategic perspective, we need to also be responsive to the changing world around us. It’s not just about what our members desire; it’s also about what opportunities are emerging in the world and the ways in which we take advantage of those opportunities. This is called “riding the wave.” The most successful organizations are either riding a wave or getting out in front of the wave. Those organizations that attempt to move forward a new policy or foster new ways of living, however worthy, will not see much progress unless (or until) there is a groundswell of people in the world already moving those changes forward outside that organization.

To be strategically opportunistic, we align ourselves with that which is mission-focused and with the good that seeks to emerge in the world. To reference the famous quote used by Dr. Martin Luther King, Jr. and former President Barak Obama, “the arc of moral history is long, but it bends toward justice.” As we know from our tradition, God (or the divine spirit of existence) has promised that redemption will ultimately come, yet only if we take upon ourselves this covenantal partnership. While our organizational missions all speak to some good to be achieved in the here and now – whether it’s about creating communities of caring, helping those in need, educating the next generation, providing spiritual uplift, or seeking social justice - these are all steps on the journey toward ultimate redemption.

So, how do you discover that which is emergent?

The simplest way to do so is to discover where the energy is. What jobs are people trying to do on their own that fits your mission? Don't think that you need to offer something that is unique and different from what others are doing. Rather, join with them and align your work toward this shared cause. Your unique value is offering a platform for everyone to work together, grounded in Jewish tradition and hopes.

You need not jump in with both feet. Wade in, and if this propels you toward fulfillment of your mission, then double-down on the resources available to those activities that are further energizing your members. Eventually, you will need to pull resources from those activities that are not being seen as comparably worthwhile. However, by then this will become easy to do, especially compared to an alternative scenario of having started by detailing a strategic plan and asking people to go along cause reason advocated so. People don't let go of what they have unless there is something more exciting and promising that is already emerging on which they can grab hold. This is a core assumption of emergent strategy.

### **FAIL YOUR WAY FORWARD**

Now that you have understood more deeply the jobs your members want to get done, have become a platform where those members can co-create, and have aligned yourself to that which is emerging in the world, the question before you is: How do my members and I go about creating new programs and services? Traditionally, this would call for a strategic planning process. But, long-term, formal processes designed to strategically guide organizations have always suffered from fundamental problems. The least of which is that they are not motivating and they are not easily adaptive. For more on the problems

with strategic planning and the benefits of ongoing strategic thinking, see this [article](#) in HBR by Henry Mintzberg.

In today's rapidly changing environment, strategic planning is even less appropriate. You need to become as agile as the environment in which we operate. Like a sailboat on the water, you need to be able to shift back and forth, taking advantage of the emergent winds to reach your goals. This requires a different relationship of planning to action. Instead of "Ready, Aim (Plan), Fire (Act)," you need to engage in "Ready, Fire, Aim, Fire, Aim ..." You need to continually re-design your programs and services based on what you learn from experiments in action. And, these experiments need to be rapidly developed, implemented, and assessed. They are not pilots that you launch over the course of a year or even a few months, but rather prototypes quickly put together to learn something and then redesigned quickly to learn more and more. You can even bring this model into an existing program. For example, when running a summer camp, we don't expect to have figured out all the details ahead of time. Each day brings challenges and new opportunities, which we can take advantage of by prototyping new experiences for our campers, learn from them, and continually pivot. To learn more about prototyping (in the context of "design thinking") watch this brief [video](#).

This entrepreneurial way of being requires that you become comfortable with failure. Similar to the discussion above on platforms, being entrepreneurial requires that you replace a focus on excellence of product with excellence on learning (how to create better products and processes). This is called "failing forward." The goal is not to succeed at first; rather, you experiment and learn from what didn't quite "hit the mark" so next time you can come closer, and so on and so on.

The challenge to many of us is that we are not actually good at learning. The more successful we have been over the years at what we do, the harder it is for us to be open to new ways of working in the world. “It’s worked for me all these years, why stop now?!” And, yet in our rapidly changing world, what once worked does not work as well as it used to, and furthermore blinds us to new opportunities.

### **LEAD THROUGH MIDDOT (AND TELL STORIES)**

Finally, through all this, you need to lead! Obviously, we are not talking about leadership that sits on high and commands. Rather, a leader who seeks to understand all he or she doesn’t know, a leader who encourages everyone to co-lead, a leader who aligns him or herself to a greater purpose, and a leader who is continually experimenting and learning. In other words, a leader who empowers the entire community to swim together in the whitewater of life.

This will take exemplary qualities, some of which you will have and others that you will need to nurture in yourself. Four of the most important virtues (middot) of leadership, corresponding to our four strategies above, are:

- Humility (*Anavah*) – Humility involves the recognition that you don’t know everything you need to know in order to lead successfully. Yet, it is not the opposite of pride. Rather, it involves taking appropriate pride in your ability to continue learning and growing as a person.

- Compassion (*Rachamim*) – Compassion, ideally, involves a relationship grounded in understanding and solidarity. It is not pity “for” someone, but rather standing “with” someone in their suffering. In hearing the cry of the other, we choose to respond by being a witness to their life and by allying ourselves in action.

- Faith (*Emunah*) – Faith involves trust in God (or the unfolding of history toward justice), in others, and in yourself. The faithful person is neither certain of the course of life nor does he or she only find meaninglessness. With faith, we can stand firm (*aman*) amidst the wayward currents of life.

- Courage (*Ometz Lev*) – Courage involves finding the right balance between foolhardiness and cowardice. It’s not that the courageous person has no fear; it’s that he or she is not overly fearful. As the Hasidic master Rabbi Nachman of Breslov actually said: “The whole world is a very narrow bridge, and the main thing is not to fear all. (*Kol ha’olam kulo gesher tzar me’od, vehaikar lo lefached klal.*)”

Last, as a leader in these challenging times, you foremost need to be authentic. This has many interrelated meanings. First, you need to be transparent and honest with your colleagues and the members of your synagogue or communal organization. Second, your mind, heart, and body need to be aligned. What you think, what you hold dear, and how you act need to move forward together. Third, you need to integrate your personal authenticity (and the personal authenticity of your members) with the authenticity of our tradition. In doing so, personal struggles acquire greater meaning and purpose.

One way that you achieve the latter is through the telling of stories. For leaders, the basic story is always some variant of we are here, we need to go there, and this is how we will get there together. Yet, every story draws its meaning from past stories, even as you seek to move toward an unknown future. The personal journey become more relatable when couched in the idioms and tropes of one’s traditions. And, in the re-telling of those traditional stories within the context of our current lives, we are not only inspiring

the members of our organizations onward. We are breathing life back into our traditions.

The journey forward is uncertain and challenging. The strategies described above can offer vital guidance, though they are not easy to implement; I struggle myself with finding the right balance and the next steps forward. Moreover, the logic or reasonableness of strategy will only take your community so far before overwhelming fear or hopelessness sets in. It is the relationships that you strengthen through the above strategies that will sustain your community. And, it is stories that you tell that will inspire them to go beyond what they fear and instill continued faith that we will rise again together.

## **ADDITIONAL RESOURCES**

### **Brief Articles/Videos:**

Margaret Wheatley, "Let Go and Lead" video can be found [here](#).

Chris Argyris, "Teaching Smart People How to Learn" can be found [here](#) in HBR.

Shelley Rogers, "5 Tips for Failing Forward" can be found [here](#) in Inc.

For more on design thinking, go [here](#).

### **Important Books:**

Clayton Christensen, **Jobs to Be Done**

Margaret Wheatley, **Turning to One Another**

Hayim Herring, **Leading Congregations and**

**Nonprofits in a Connected World**

Peter Senge et al, **Presencing**

C. Otto Scharmer, **The Essentials of Theory U**

Adreinne Maree Brown, **Emergent Strategy**

Ronald A. Heifetz and Marty Linsky, **Leadership on the**

**Line**