



The first 90 days following congregant approval to commence with unification will determine the likelihood of your success. Based on our experience, we identified four essential principles:

1. Agreed clarity of purpose
2. Aligned clergy and lay leadership
3. Detailed structure
4. Controlled messaging



1. Agreed Clarity of Purpose

Based on research by Boston Consulting Group, transforming an organization visibly treated as a high priority achieves a success rate of up to 48% greater than those who lend less commitment to the process.

- The purpose for unification, however, cannot rest solely on financial terms. Clergy and lay leaders must frame unification as improving the value proposition for its members who all have a stake in the well-being of their synagogue
- At its core, a value proposition focuses first on congregant needs and wants, on what they believe requires improving and what they believe requires preserving. Next, you focus on what you offer, on how you are improving, and how you are preserving
- Members, as well, are more likely to support changes inherent in any unification if they embrace its process as opposed to having the process imposed upon them



2. Aligned Clergy and Lay Leadership

Clergy and lay leadership are at the center of any unification in that if they are not themselves unified, congregants will struggle providing their support.

- Unifying clergy and lay leadership is not a passive act; candid discussion and resolution precede any unification effort
- Avoiding resistance or dissent amongst clergy and/or/between lay leadership eventually forms an insurmountable barrier to unification in that congregants lose confidence that proposed outcomes will occur and grow tired of illusive intentions while their advocacy for unification collapses
- Developing a new vision statement is one of the best steps to identify what clergy and lay leadership can adopt as a genuine expression of what they believe and why, especially when the new vision statement includes inspiration from congregants



3. Detailed Structure

Unification demands structure because unification is about process, about understanding foremost what all stakeholders envision as the completion point and then working backwards to what are the steps necessary to achieve it.

- These steps, their scheduling, the volunteers who accept accountability, stumbling blocks and bottlenecks that surface, adaptation that follows, and the tracking of progress, all evolve around five blocks of responsibility:



- These blocks of responsibility and their sub-categories are typically managed by one individual who spearheads the unification under the direction of an oversight committee



4. Controlled Messaging

Communicating amongst clergy, lay leadership, congregants, and in public spaces and domains benefits from both transparency and single-source messaging.

- In my experience, supported by experiences at McKinsey, the oversight committee, with the input of the individual managing the unification, prepares a central record that is circulated by the oversight committee
- Of equal importance is that misinformation spread by others, either willfully or unknowingly, must spur prompt correction or risk damage to credibility