

UJA-Federation of New York

SYNERGY

Innovations and Strategies for Synagogues of Tomorrow

DATA MATURITY FOR SYNAGOGUES: INCORPORATING DATA INTO THE DECISION-MAKING CULTURE

Prepared by Idealware

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INTRODUCTION

For years, UJA-Federation of New York has been exploring how data-informed decision making can help synagogues thrive. Through the Sustainable Synagogues Business Models project, facilitated by Measuring Success from 2009 to 2012, UJA-Federation learned that thriving synagogues regularly assess and make decisions based on the extent to which their communal vision, mission, and values are aligned with all aspects of synagogue life. We also learned that it matters which systems synagogues use to collect data. In order to help synagogues assess which system might meet their particular needs, UJA-Federation funded the development of “A Guide to Synagogue Management Systems: Research and Recommendations,” and more recently a 2014 update, in collaboration with the Orthodox Union (OU), Union for Reform Judaism (URJ), and United Synagogue of Conservative Judaism (USCJ).

Furthermore, we have also learned through observations in the field that synagogues are not simply “data-driven or not data-driven.” Rather, there is a broad spectrum of data maturity, beginning with simple data collection and moving along the spectrum in complexity to reflect more sophisticated uses of data.

This paper reflects UJA-Federation's commitment to identifying and sharing innovations and strategies that can support synagogues on their journeys to become thriving congregations. We retained Idealware, a nonprofit specializing in software and data, to collaborate with Measuring Success, a consulting firm that specializes in working with synagogues on their data practices, in order to develop this report. In these pages you will find a description of the characteristics of each phase of data maturity and a simple assessment for synagogues seeking to understand where they fall on the data-maturity spectrum. Finally, this report outlines specific strategies for those seeking to take the next step along the data spectrum.

We are pleased to share these strategies for the benefit of synagogues seeking to be more data-driven, and we welcome your thoughts and reflections.

Join the conversation by e-mailing us at synergy@ujafedny.org.

Chair

Michael Laufer

Executive Director

Adina H. Frydman

SYNERGY: UJA-Federation of New York

MAKING DATA PART OF THE DECISION-MAKING CULTURE

Why collect data?

Tracking your own progress is important, and tracking the way your synagogue interacts with congregants can help you better understand and serve your community. It also allows you to compare your progress against both your past experiences and the experiences of other organizations. By providing a clear understanding of where your organization is in terms of effectiveness and efficiency, it can help you more clearly see the things you're doing well and the areas in which you need to improve. It can also support your intuition when your gut instinct is correct, making it easier to get others on board with your ideas or decisions. And when you're wrong, it can help you see that, too. In short, data can help you make a stronger argument for change — or, one for staying the same.

“Data maturity is a continuum, with synagogues using a fully realized CRM model at one end of the spectrum and synagogues that do not collect or track any information at all at the other end.”

By helping you better understand the wants, needs, and interests of your community, data can better position you to meet and provide for them. It can also help you expand your community by tailoring your programs to match its needs and interests.

But it's important to note that data doesn't always mean change. It can help you identify all the things you are doing right and not just the areas in which you need to improve, making the case for continuing with the status quo by proving that what you're doing is working.

While synagogues are organized and run differently than businesses or even other nonprofits, there's still much they can learn from those organizations — from their successes, their failures, and their approaches to constituent management and engagement. More and more, organizations in the wider nonprofit sector are turning to a data-driven decision-making model. Thanks to technology, data is easier than ever to collect, track, access, and report on, though doing so effectively still requires vision and planning. By using data to inform their actions and decisions, synagogues can improve their efforts to serve their congregations and their wider communities, and better contribute

to the discussion about the formation of a collective Jewish identity. A core group of synagogues is doing just that, and these synagogues can serve as helpful role models for data-driven decision making.

What is data-driven decision making?

At its most basic, data-driven decision making involves collecting and tracking some kind of information about your congregation — from simple things like attendance to more complex ideas, like the different ways congregants interact with your synagogue — and then acting on what you learn from that information.

It's tempting to argue that data-driven decision making somehow counters or detracts from using values associated with Jewish identity to drive your synagogue, but the opposite is true. Data can help you define and support these values. In fact, we've identified this support as an overarching goal of the effort to improve data maturity.

The ideal outcome is for data to be incorporated as part of the culture at your synagogue so that it becomes second nature to collect it and act on it, and so your clergy, executive director, or board members don't make decisions about synagogue business unless they are supported by data. Not all organizations reach this level of data maturity, and not all want to.

What's a good goal to aim for?

According to Measuring Success, a consulting firm that has worked with a number of synagogues on their data practices, the goal should be to adopt and implement a Constituent Relationship Management (CRM) model to track synagogue membership. This model involves three steps: the software to track, access, and report on this data; staff or lay leaders committed to collecting and acting on the data consistently; and strategic guidance from some or all members of senior staff.

Data maturity is a continuum, with synagogues using a fully realized CRM model at one end of the spectrum and synagogues that do not collect or track any information at all at the other end. For small synagogues that are short on resources or not yet collecting even basic data, the process begins with modest steps, such as grounding initiatives in some level of data gathering. For synagogues that have greater resources, there are still opportunities to make better, more systematic use of the data they have.

Tracking data requires a couple of things from a synagogue, including the right tools, know-how, and buy-in from clergy, lay leaders, and staff, as well as the congregation. Tools can be as simple as a suggestion box to find out how congregants feel about your synagogue or a sheet of paper to take attendance at an event, or more complex, like online survey tools, spreadsheets, and synagogue management databases. Not having the right tool for the type of data collection you seek to do can be a barrier to moving along the data maturity spectrum. There are other barriers, too; some are universal while others apply to each particular level of data maturity. As we detail each stage of the progression, we'll spell out a list of possible barriers to success at that stage. These barriers can feel overwhelming when listed in a row, but not every synagogue will face every barrier; these are just a list of things to watch out for. Acknowledging what is keeping you from moving forward is a key step toward improving your use of data.

As you read through the stages and steps, it's easy to think the information is overwhelming or that it doesn't apply to your synagogue. You may realize that you're not going to flip a switch and make your synagogue a data-driven organization, and that's a good realization to make. Our goal is to help you identify where your synagogue falls on the spectrum, find the steps you need to achieve the next stage, and realize that there is no perfect position to reach. We've included short, fictionalized case studies based on actual synagogues to show you how an organization might use data and what it might look like to be at a given stage of the progression.

The entire process is a nuanced one, and synagogues may find themselves at different points along the continuum. Start there and work to advance in a strategic way.

There are small steps you can take at each stage to improve. Your first action should be performing the self-assessment to identify where your synagogue currently falls on the spectrum; then you should start setting both short-term and long-term goals. Then you can start identifying the next steps you need to take.

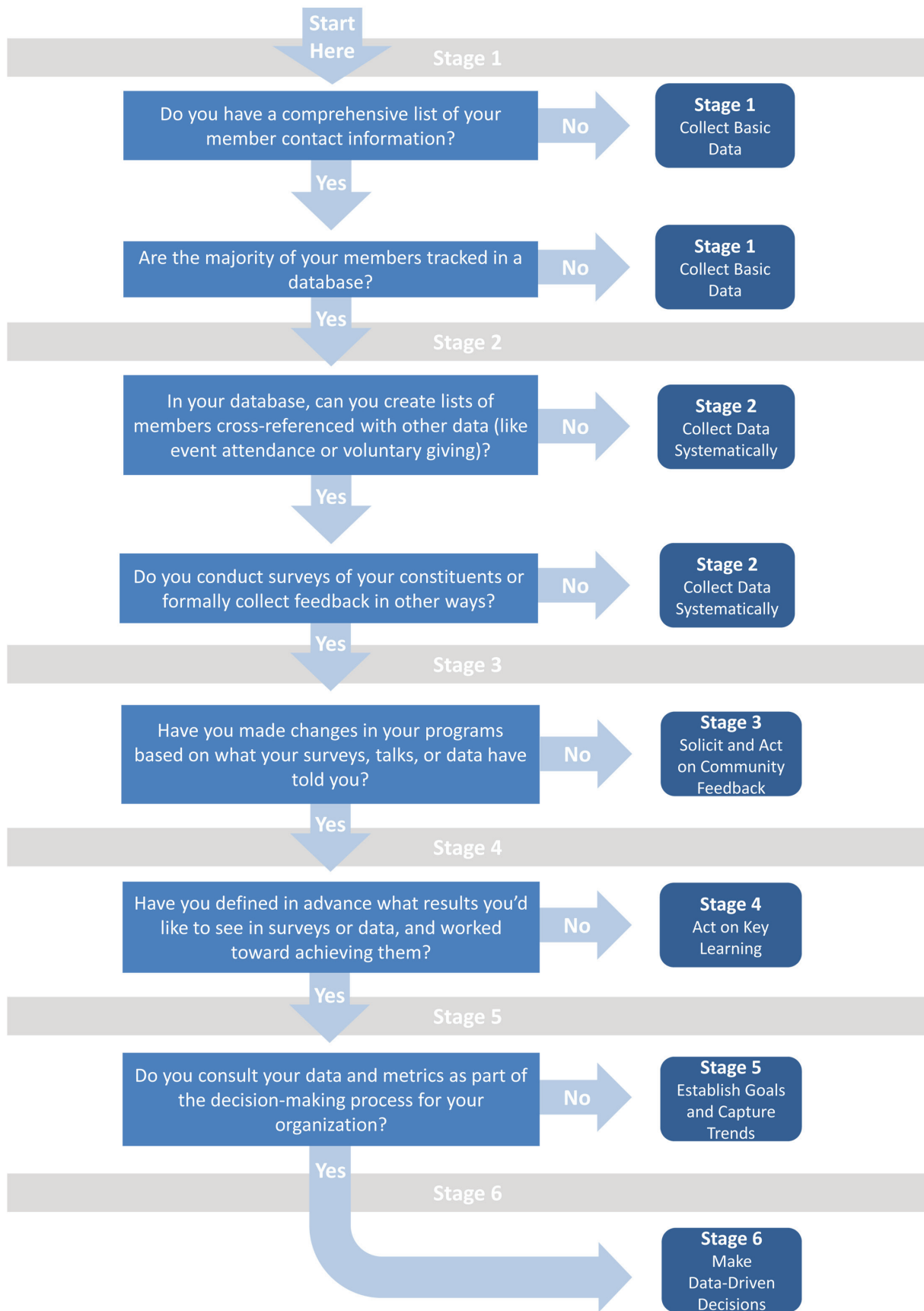
“By helping you better understand the wants, needs, and interests of your community, data can better position you to meet and provide for them.”

We talked to synagogue leaders who said their biggest impediment to collecting and using data in even the most basic of ways is not knowing where to start. There's no silver bullet, but the single biggest, and simplest, thing you can do to improve the data maturity of your organization is to form and enforce a consistent commitment to gathering data that helps inform strategic decision making, even if it's the data you're already gathering. **There's a place for data in every synagogue, no matter the size. It should play some role in decision making for every synagogue, but that role is going to look different for everyone.**

How do you know where your synagogue sits on the spectrum? We've included a brief self-assessment on the next page to help you determine the status of your own efforts, which is the first step toward advancing them.

To move forward on the data-maturity progression, you first need an idea of where your synagogue currently is. Start at the top of the flowchart on the next page and follow the arrows to determine your synagogue's current state of data maturity. Then, refer back to the descriptions of the stages starting on page five of this report for examples of the next steps you'll need to advance along the continuum, or to help identify possible barriers you may need to overcome or address before you can progress to the next stage.

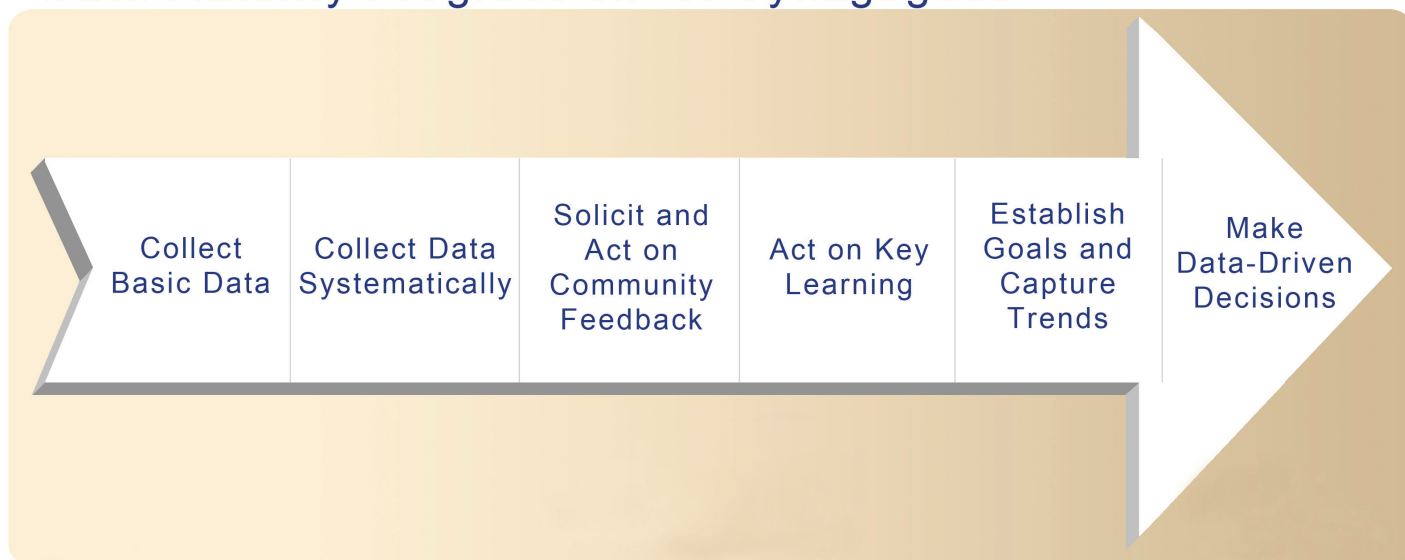
SELF-ASSESSMENT TOOL



THE DATA MATURITY PROGRESSION

We've identified six stages of data maturity, as detailed in the diagram below. Stages are not absolutes, not black and white; they're rough points along a line, and your organization should fall somewhere along the line. For each stage, we'll also list potential barriers to advancement to the next level.

Data Maturity Progression for Synagogues



Stage One: *Collect Basic Data*

This is the initial stage of the progression and should be seen as a beginning point. This stage includes gathering any kind of data at all: collecting e-mail addresses, counting how many people attend synagogue programming, etc. This stage only includes collecting information, not acting on it, but it shows that your synagogue recognizes the value of having information about your programs and your congregation. The specific data you're collecting will vary, but for most synagogues, the bare minimum is member demographic and contact information.

Barriers to Success

Chances are that you're already collecting some basic data, but there may be barriers preventing you from collecting the type of data you need with the frequency required.

Common concerns include:

- Not enough time and money
- Lack of buy-in from leadership and staff
- Concerns that data will create too much transparency
- Fear around lack of privacy
- Anxiety around data leading to staff evaluation
- Fear of using data improperly

Case Study: *Data Isn't Yet a Top Priority*

A small synagogue in upstate New York has just a few staff members, a rabbi, a board president with almost no management experience, and virtually no experience collecting data or considering how it could benefit the synagogue. The lay leaders aren't opposed to it – and neither is the staff – but they are unaware of its value or the steps involved in moving toward a data-driven model. In fact, data is the last thing on the minds of the board members, who are too busy trying to pay bills and keep the synagogue afloat financially. Event attendance is healthy, but no one is tracking it.

The synagogue's only plentiful resource is the community itself. The congregation is enthusiastic, turning out in numbers for services and events, and it's usually easy enough to enlist volunteers to help staff events appropriately. But even those efforts are disorganized. Lately, to help take advantage of this resource, the board has begun to compile and maintain a list of volunteers and their contact information, the types of events at which they're interested in helping out, and a list of the events at which they've already participated. By scheduling volunteers, events have been running more smoothly, freeing up board time

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and energy to focus on other business. Event attendees have been happier with the better-run programs, and more and more people have been signing up to volunteer.

This success with volunteer tracking has led the board to begin conversations about the value of data for day-to-day synagogue functions. In their next board meeting they plan to discuss additional areas where they might encourage staff to collect data, how they might collect it, and where it would live within the synagogue's current system, which are the first steps toward reaching the next level of data maturity.

Getting to Stage Two: Next Steps to Consider

Once a synagogue is collecting basic data, it can consider moving to the next stage to collect data more systematically. The move from this stage to the next is one of the easier advances to make; as you move along the progression, it can become increasingly difficult to reach the next level. Articulating the intention to collect more data because of its intrinsic value will be transformational. Then you must decide when not to collect data and shift the conversation to issues of how to gather and store the information.

Stage Two: Collect Data Systematically

This stage is similar to Stage One in that it continues to involve collecting basic data, but synagogues at this level are collecting and storing it in spreadsheets or a database, where it is sortable, accessible, and reportable. At this stage, they're still not utilizing data to make decisions, but they're gathering it more systematically.

Your synagogue might be collecting basic data points like those mentioned in the previous step, but collecting them in a way that is unreliable or inconsistent will keep you from reaching your full potential or even make your data unusable. If you track members' birthdays as well as accounting information such as dues collection and voluntary giving, you should be able to use that information to reliably cross-reference, for example, all members in a given age group who voluntarily donate a certain amount of

money. A good practice is to define the basic types of information that would be necessary or helpful for your synagogue to have and to make the commitment to gather that information.

The goal is to be able to use the data constructively to make strategic decisions; at Stage Two, the focus is on gathering that data consistently and reliably.

Barriers to Success

In addition to barriers from the previous stage, synagogues at this stage now face technology concerns. Do you have the software to store and manage this data? Do you have modern, functioning computers powerful enough to run it? Do staff or board members know how to use it? Technology concerns can be overcome with a thoughtful approach to infrastructure. Synagogues at this level can also get stuck if they lack some standard operating procedures, such as a form for capturing basic membership demographic information or a process for ensuring that the information is up to date.

In addition, unwilling congregants might also draw boundaries establishing the levels at which they want to be involved with the synagogue, for example, only attending on High Holidays and not wanting to take the time to fill out forms that would collect their information.

Case Study: Tracking Data Is Second Nature

A midsized urban synagogue has a healthy population of younger professionals, many of whom grew up around computers and continue to work with them occupationally. The staff is younger, too, and relatively tech-savvy. Because the board understands the value of technology — and was able to persuade the religious leaders of its value as well — it has made it a priority to spend a little money on infrastructure to help, including newer computers and a database chosen specifically because it would meet many of the synagogue's particular needs.

Staff has been able to successfully track attendance at services and High Holidays, as well as community events at the synagogue and religious school. It's become second nature, and the information is entered and stored into the databases where it's easily accessible and readily reportable.

Having staff, board members, and a congregation comfortable with technology and pulling in the same direction to incorporate it into synagogue infrastructure has enabled this particular community to make an easy transition to the next stage of data maturity.

There's still room to improve. Staff enters data into the databases when possible, but less often and rigorously than they could; they still face a lot of distractions, and the easiest way for this synagogue to move forward along the progression would be to solidify and improve data-entry processes and to begin using the data they've diligently collected to understand what is working and what could be improved in the synagogue's day-to-day functions.

Getting to Stage Three: Next Steps to Consider

Moving from systematically collecting data to the next step of data maturity requires asking questions of your data and analyzing your information to learn more. At Stage Three in the progression, synagogues will not only recognize that there is value in collecting and storing data, but that there are lessons to be learned from asking strategic questions and analyzing data. Progressing will include taking additional time to strategically collect data that answers key questions and analyzing that and other existing historic data to understand what congregants think of the synagogues' programs or community functions.

Stage Three: Assess Community Feedback

While Stages One and Two are concerned with gathering facts about the people who interact with your organization, this stage involves learning how they feel about your synagogue and its programs. **Essentially, this stage is all about asking for and receiving feedback – not just how individuals feel, but ultimately understanding the collective sentiment of the congregation or community.** This information can be gathered in a number of ways, from surveys and interviews to phone calls or even simple conversations. How you keep track of this information can vary; it might involve a database of some sort, or it can live within the survey tool used to gather it. This is also the stage in which synagogues will start asking pointed questions of the data that has been collected, not necessarily with intent to make changes, but in a more exploratory way, inquiring about what is working and how things are going.

Barriers to Success

While the barriers mentioned previously also apply to this stage, it comes with its own additional obstacles. Some, like a lack of understanding of how the process works, are easier to overcome through training or other educational opportunities than less tangible barriers, such as privacy concerns among congregants or a lack of consensus from stakeholders about how or why to proceed.

Organizations struggling at this level can face challenges including a lack of desire to spend the money or time required to gather this data, or a resistant board that wants to maintain the status quo of the synagogue. In addition, staff or leadership can be concerned about data collection highlighting areas in which they're struggling, and for some synagogues, asking for feedback from the congregation might even go against the projected image of being a place the community comes to for answers. Another possible barrier is the need to contend with potentially conflicting agendas of clergy, lay leaders, and the rest of the congregation. There may be concern that the data will be utilized to evaluate staff and congregational leadership.

Even if you're able to overcome some of the participation barriers and start gathering this data, you still face obstacles such as selection bias. In other words, the congregants most likely to participate are your most active congregants and not necessarily a cross-section of your larger community.

What actions can synagogues take to reach this step? It's okay to start small. The easiest way to begin gathering sentiment from your congregants is to ask them, either directly or with a simple survey or suggestion box. If you learn a few helpful things, it stands to reason that there's more to be learned, building your confidence as you expand your efforts. Be aware that asking for feedback creates an expectation that there will be a response to the feedback. Thank congregants for taking the time and communicate frequently to share key learnings from their feedback. This will create trust and a willingness for them to give feedback in the future. In addition, because it's hard to know what you don't know and what questions you should be asking, you might consider seeking out training or education about what other synagogues or organizations have done.

Case Study: Boosting Participation by Determining Community Needs

A large synagogue with a thriving community has a full schedule of programs, including a Hebrew school and post-Hebrew school events. There are often fundraisers, opportunities to listen to visiting speakers, and other community gatherings. The one notable exception is that participation in the youth group has dwindled dramatically.

In an effort to find out why the normally active community does not take part in the youth group and determine what it is looking for in such a program, the board has been soliciting feedback in a number of ways. Staff has been circulating surveys and hosting parlor meetings at which the board president asks questions about the youth group, in particular, and other types of programming that might appeal to the community.

In addition, synagogue staff has been asking parents of those children who do participate what they like about the youth group and what they'd like to see the program do differently. In informal discussions, they've also been asking the children themselves, figuring that if the kids aren't happy, their parents won't be happy.

Early results show that the program itself is well-organized and the activities it hosts are in line with expectations, but that the schedule conflicts with many other events run by local public schools. Staff is now looking for ways to change the schedule and has begun soliciting additional feedback specifically about the scheduling desires of the community. To reach the next stage of the progression, the synagogue can implement changes based on the surveys and other feedback it's gathered.

Getting to Stage Four: Next Steps to Consider

Once you've committed to systematically collecting data and have begun assessing that data, you're ready to move to Stage Four: Acting on Key Learning. To make the leap from Stage Three, you will need to gather staff and leadership buy-in, as this transition is the one in which true organizational action comes into play. At Stage Four, synagogues will not only look at data around program success and community satisfaction, but will begin to make changes based on what that data says. As with Stage Three, movement to Stage Four can (and maybe should) start with a single pilot program. Success in one small area of synagogue life can then be used as proof that the lessons learned from your data can generate transformation across programs, ultimately improving overall community satisfaction.

Stage Four: Act on Key Learning

All the information you've gathered is trivia, not data — unless you act upon it. Collecting data, interpreting the data, learning from it, and using it to change the way you approach things can be time-consuming but worthwhile. The most common areas in which this is applied in synagogue life are within the programmatic areas, resource allocation decisions, and the aligning of synagogue vision with congregants' visions.

For example, you might learn from conversations with your congregation that people are unhappy with religious school events scheduled over three-day weekends because that limits family vacation time. Acting on that information would mean adjusting the calendar so that religious school events are no longer scheduled over three-day weekends.

Another example is collecting community feedback through a membership survey that helps you understand your congregants' values. That information could then be used to help rewrite or adapt your synagogue's vision statement to fit your community.

At this stage in the progression, it's not enough to recognize that people are unhappy with a particular aspect of a program or to understand what part of your events schedule is successful. You need to act on your knowledge. Here we take the data that has been gathered and use it to make real and useful change at the organization, growing successes and minimizing weaknesses.

Barriers to Success

The familiar barriers from previous stages also apply here — staff might resist because they're too busy, your board might not want to spend any extra money required to implement the changes, and you may need to overcome a culture that is opposed to change. Synagogue staff and members of your congregation are only human, and humans are often slow to accept changes to the way they've been doing things. They may also have questions and concerns about who will do the extra work it requires and how they'll make time for it. Potential issues may arise if the information collected from congregants is in opposition to executive or board goals or perceptions. Other challenges include interpreting the data correctly and knowing whether the data is accurate. Finally, acting on data regularly requires time and effort, and a synagogue without the staff to put in the time will find it more difficult to succeed at the more advanced stages.

How do you overcome these barriers? Because there's going to be bias any time you try to interpret data, you may find disagreement about what the data means or how to act on it. You could bring in a consultant to help with this step or ask different departments — or different areas of your synagogue — to look at the data and decide what it means to them, making the data part of an open conversation. It can also help to make data a regular part of meetings so that staff and other stakeholders become comfortable and conversant with it.

Case Study: Using Data to Effect Change

A 500-congregant synagogue in an urban setting has the benefit of a significantly large community, providing solid funding, deep pools of volunteers, and a good-sized staff. It also has an executive director whose previous job was running a very data-centric nonprofit. Because there are a few professional staffers, these staffers are better able to carry the load than those at a smaller synagogue reliant mostly upon volunteers and lay leaders.

“It can help to make data a regular part of meetings so that staff and other stakeholders become comfortable and conversant with it.”

A few years ago, population was down and the congregation seemed apathetic about the community. The board felt the synagogue's programs and calendar of events was solid, but believed the staff's attempts to market it to the congregation and the larger community was insufficient. It was willing to listen to other ideas, but without supporting evidence, board members were inclined to trust their instincts.

Under the new executive director, staff began an effort to systematize the data it was gathering, tracking attendance at services and High Holidays, donations, and the different interactions each member of the congregation has with the synagogue. It also has been collecting information at parlor meetings, at town hall-type meetings, and through informal surveys about what types of events the congregants prefer, what events are likely to draw volunteers or donations, and which events are poorly attended. Feedback helped the board and staff understand that the problem was not insufficient marketing, but the programming itself.

Using this information, the staff has been better able to schedule and plan, and leadership has been better able to connect congregants to each other through affinity groups. The synagogue made some changes to the scheduling that have resulted in better attendance and higher satisfaction among congregation members, which have in turn led to a small growth in membership and donations.

These efforts have been successful, but they did not happen on their own. A board member whose day job is in nonprofit technology joined the executive director as a “data champion” who could help persuade the rest of the board — and the reluctant rabbi — of the value of these practices. Change was incremental at first, but with a little progress and success, it's now happening exponentially.

Getting to Stage Five: Next Steps to Consider

This stage of data maturity is about acting on your data; the step to the next level is to find a way to incorporate that data into your daily work and practices rather than as a one-time occurrence. The main way to move from Stage Four to Stage Five is to start using data consistently to make improvements and to learn from the changes you make. This leap relies on consistency, scale, and the encouragement of leadership, much like the movement from Stage One to Stage Two. An overall evaluation of programs and the associated commitment to improvement on a wide scale will take not only buy-in and excitement from the staff associated with one program (in a bottom-up model), but will also rely on organizational leadership to drive the commitment from the top

down. The crux of this stage progression lies in the repeated or institutionalized nature of using data for improvement — not only making one-time alterations, but circling back around to understand what made those changes successful and identifying ways to replicate them in other areas.

Stage Five: Establish Goals and Capture Trends

In Stage Five, your synagogue is making improvements to programs and practices based on information you've gathered about how people feel about your organization. This stage involves asking questions about both the big and small changes you've made, and the areas in which you've succeeded or failed, in order to capture trends and identify patterns. These trends are then used to make predictions and establish goals going forward.

Following the example of the religious school events scheduled over long weekends, rescheduling them seems like an appropriate response. But if attendance begins to improve at those events, how can you be sure that your actions led directly to those improvements? You might resolve this question by performing a second round of data collection — for example, following up with questions to determine whether those changes led directly to increased attendance.

Barriers to Success

Barriers at this level include a lack of internal communication, or sharing of data, which can prevent more global learning and impact getting executive buy-in. Because the data-driven actions at this stage are ongoing and not one-time, it requires commitment from both staff and leadership. If the actions are at odds with preexisting leadership goals or agendas, or if staff or leadership personnel change, it can be difficult to stick to these efforts.

Moving to this stage from the prior one is a leadership issue; creating a strategic plan can be helpful, as can defining metrics for small, key areas. You need to commit to change in some areas. Consider identifying staff members who are willing to work on this and finding areas of change that are easy to implement and that will yield short-term results with clear opportunities for cyclical improvement. Find an easy problem or question and consider it a pilot run — gather data, act on it, gather more data, and then make a commitment to doing so in the long term by defining how you will continue to gather sentiment and other information. Find champions or cheerleaders who can help these efforts succeed, and get buy-in from around the organization.

Case Study: Using Data to Hire

A synagogue in the suburbs has made gathering data a key part of its daily practice. Staff and board members constantly evaluate the programs and make changes based on what they learn, and then follow up with new evaluations. They gather feedback in a number of ways, including annual community surveys with detailed questions about changes implemented over the past year.

When the rabbi announced his retirement, the board made a commitment that with the new hire would come a promise to use data to measure performance. They measured his performance and success on a regular basis, using both hard and soft data collection and reviews every six months. In exchange, they asked him to respond to the feedback gathered from the community.

Board members also used the new hire as a launching point for instituting an annual metrics program at the synagogue. Each staff member came up with two metrics associated with his or her position that they could reasonably measure. They identified goals for performance improvement based on those metrics, defined benchmarks and delivery dates, and implemented them. The longer-term goal was to tweak the synagogue's overall programs based on the data collected.

With a new rabbi who supports data, a community accustomed to having its input solicited, and a staff moving toward a model of using data to measure and guide their day-to-day work, the synagogue is on the cusp of the final stage of the progression.

Getting to Stage Six: Next Steps to Consider

Note that as you move further along this progression, the steps required to advance take more commitment and more complex actions. For example, when using data at Stage Five, your synagogue may be making long-term and systemic change, but the actions are likely relegated to particular campaigns to improve on key areas. When you make the transition to becoming a truly data-driven organization, data is no longer just for targeted campaigns; it's the center of all decisions large and small at the organization. This shift will need to be spearheaded by synagogue leadership at all levels and embraced by staff and the congregation. In many cases, this shift needs to happen in one quick and sweeping motion as opposed to easing into it through small steps as with the previous stages. Becoming a data-driven organization will require a culture as well as process shift.

Stage Six: Make Data-Driven Decisions

For most organizations, this stage is the pinnacle of achievement along the data maturity spectrum. It involves taking all the data you collect in the different stages and moving it from a really small-scale, programmatic focus to a part of the culture of your organization, with application to synagogue-wide issue areas. It means making data part of your day-to-day work and part of the process you use to decide about and act on issues.

As an example, a synagogue functioning at this level might have added to its bylaws that it would not take action on any issue unless there was data presented to support that action. Staff would incorporate data into its decision-making and evaluation processes, and the congregation would be comfortable with the ongoing data-gathering activities. When a synagogue reaches this stage, a synagogue makes the bold statement that data needs to inform the decisions it makes.

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Barriers to Success

Barriers at this stage can include a board that demands more data and data-driven decisions, but a staff that is unable to deliver them due to a lack of internal resources or buy-in, or the opposite – staff that provides data to a board that is uninterested or unwilling to act on it. You might encounter a fear of data that's not uncommon with people who are used to making decisions based on instinct, “gut,” emotion, or experience. It's perfectly normal and can be worked through by explaining and demonstrating how both the human element and the data element are necessary to successful decision making.

There's also the risk of an organization's staff becoming overly absorbed with data, or generating so much data that it becomes too difficult to manage and maintain. How do you get past this? Your board might choose at this stage to write into the bylaws that decisions will be made based on data rather than instinct or emotion, but you would need to acknowledge that there is human expertise beyond data. Then you would establish boundaries that would help your organization find the balance between data and human expertise; for example, you might decide that data can't overrule the entire board's “gut feeling.”

Throughout each stage, we've discussed the value of small "victories" or finding low-hanging fruit. Those small steps can help you reach this level, but once you're here, you need to be making broader organizational shifts. Being thoughtful and planning out cultural implications in advance – such as how this move to data-driven decision making will affect your staff, board, and congregation – is important.

Data is used at all levels of the organization, not just by leadership. A key to success at this stage is figuring out how to effectively bridge the divide between leadership and staff, and acquiring "data champions." You can pilot an effort by finding people who are already on board. But to roll out something this substantial to the entire organization, you need to win new people over.

Case Study: Making Data Routine

At a large suburban synagogue, data has been a part of the daily business for a long time, and the staff and board members have worked to incorporate it into everything they do. It's used at all levels of the organization, in community feedback, performance metrics, and to support actions and decisions. The synagogue has brought the use of data into all of its programs as well as into the ways the overall organization is evaluated.

The synagogue approaches data collection and implementation thoughtfully. Decisions about events, programming, and the religious school are made using historical trends to make best guesses about their success. The board considers data on par with staff recommendations when it comes to acting on the future of the synagogue. This acceptance of data can also lead to things like resource allocation shifts by creating a better understanding of how the budget aligns with members' needs and priorities.

Not everyone was on board with the shift to data-driven decision making. There was some staff turnover as a result of this resistance, but new staff members with strong commitments to data were hired, and they've helped raise the value of data at the organization.

"Members of the community feel heard and report an increased overall satisfaction with the synagogue."

Congregants are actively involved in shaping their community. Their input is not only solicited, but welcomed. The annual newsletter includes a short survey, there's a voicemail box dedicated to suggestions, and the staff holds quarterly town-hall meetings to float and solicit ideas about the direction of synagogue programming. As a result, members of the community feel "heard" and report an increased overall satisfaction with the synagogue. They feel the staff and board are responsive to their needs and better able to meet them as a result of these communications.

An unexpected benefit of this data-driven decision making is that the synagogue has received some national prominence and is seen as a leader in the use of data. Other synagogues have reached out to it for help with embracing data, which has increased buy-in further and bolstered confidence, leading to greater reflection about what staff and leadership are doing well and what they could improve upon.

SUPPORTING THE JEWISH IDENTITY OF INDIVIDUALS AND THE COMMUNITY

As stated earlier, synagogues differ from other nonprofits because the larger goal of their data usage is to support Jewish identity outcomes. Congregations use data not just to make decisions about how a synagogue is run, but to make and drive decisions that will support the broader Jewish community. They help community members address questions of what Judaism means to them in order to support Jewish practices across the community and within the congregation over the long term. This might include helping constituents reach conclusions about how they hope to be involved in the congregation, what it means to lead a Jewish life, or what being Jewish means to them. What is it about the way they practice Judaism that defines

their Jewishness? This can also mean encouraging and helping members to enhance their spirituality and reflect on their own personal Jewish commitment.

This goal of supporting Jewish identity outcomes informs each of the different stages of the progression. During the daylong gathering that spawned this report, participants frequently articulated the concept of "being data-driven and vision-aligned." As a synagogue, you're always striving to use data to be better at achieving what you envision for your organization and your community – which is, in itself, the concept of this entire data-maturity model.

METHODOLOGY

In December 2013, UJA-Federation retained Idealware to co-facilitate a daylong gathering with Measuring Success to discuss the data maturity of synagogues at UJA-Federation's New York office. This day of training was framed around a collaborative process of workshopping the state of synagogues' data maturity so that all participating organizations were better able to determine their own relationship with data and how to improve it. Participants in the program collectively identified stages of a data maturity spectrum – the “progression” detailed in this report. This is the basis of the different levels of synagogue data maturity as well as the source of next steps organizations can take to move their communities forward.

In addition, we conducted a two-hour-long focus group in March of 2014 with representatives from the URJ, OU, USCJ, National Association for Temple Administration, and the North American Association of Synagogue Executives. During that conversation, we further refined the stages of the progression and gathered information about how the different stages of the progression specifically apply to synagogues. Several one-on-one telephone calls were conducted with additional representatives in May, and we incorporated all this feedback into the final draft of the report.

The goal is for synagogues to benefit from these resources to help them understand the data they currently track, and how they can use that data to better serve their congregations.

Contributors

Idealware staff members involved in the data maturity gathering, focus group, and report narrative included the following:

Laura Quinn, Executive Director

Chris Bernard, Editorial and Communications Director

Andrea Berry, Director of Partnerships and Learning

Kyle Andrei, Research Analyst

Joe Rosshirt, Illustrator

Focus-group and phone-interview participants included:

Beryl Chernov, North American Association of Synagogue Executives

Adina H. Frydman, UJA-Federation of New York

Rabbi Judah Isaacs, Orthodox Union

Marty Kunoff, United Synagogue of Conservative Judaism

Michael Laufer, UJA-Federation of New York

Barbara Sidel, Union for Reform Judaism

Sharon Shemesh, National Association of Temple Administrators

Naomi Wolinsky, UJA-Federation of New York

Measuring Success staff members contributed editorial review of the report content.

About Idealware

Idealware is a nonprofit that conducts research on the different software and technology products available to nonprofits and advises them on choosing the right technology to support their goals. In recent years, Idealware was engaged by UJA-Federation of New York on behalf of a consortium comprised of the Orthodox Union, Union for Reform Judaism, and United Synagogue of Conservative Judaism on a large-scale research project evaluating constituent management systems for synagogues.

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Ben Greenberg

Planning Coordinator

Sarah Ecton

Senior Administrative Assistant

Jared Schwalb

Administrative Assistant

Leyat Elkobi

*Executive Committee member



MAIN OFFICE

New York

130 East 59th Street
New York, NY 10022 | 212.980.1000

REGIONAL OFFICES

Long Island

6900 Jericho Turnpike, Suite 302
Syosset, NY 11791 | 516.677.1800

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701 Westchester Avenue, Suite 203E
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