

UJA-FEDERATION OF NEW YORK THRIVING SYNAGOGUE LEARNING TOOL

Thriving Synagogue Learning Tool – Marketing Plan

Introduction

The purpose of marketing, or creating buzz around the Learning Tool survey, is to get the highest response rate possible for your congregation survey through informative, motivating communication to your members and participants. The survey models the values of inclusion, shared ownership, and transparency. Encouraging universal participation sends the message that everyone has a say and everyone has a share in the results.

Buzz is created through a marketing campaign that calls upon your ingenuity, persistence, and good humor. Synagogues with strong campaigns generate member enthusiasm for, and participation in, the survey.

Before scheduling the launch of your survey, make certain you have allotted adequate time for creating buzz and that you have chosen a launch date that makes the best use of your existing congregational calendar.

Key Principle: The Congregation Survey Is for Everyone

- The survey is a major intervention in the life of a synagogue. It gives voice to every single member and participant in your congregation.
- The survey is one of the few times that the synagogue tries to reach each and every person. It is truly a synagogue-wide event and opportunity.
- Some people believe that because of their low level of involvement, they ought not to fill out the survey. The exact opposite is true. Because they are uninvolved, their input is especially precious.
- We know from previous research that different constituencies have different views of the synagogue. It is only when these are put together that you can fully comprehend the character of your congregation.

Key Principle: Response Rate Is Critically Important

Persistent attention to response rate will assure that you get data that you can trust and use. Although not realistic, we always aim for 100% participation. In reality, your goal should be to achieve a minimum response rate of 50%.

- A high response rate is needed to assure the reliability of the survey. If you hear from only a few people in the synagogue, you have no way of knowing if their views represent those of the full membership or not. The higher the response rate, the more confidence you can have in the results.
- Results from 50% of your congregation are likely to be representative of the whole.
- A 50% response rate tells you that at least half of your members are willing to take 15 minutes to think about the synagogue and its future.

- Your response rate is your first data point. It is the learning that answers the big question: Do your members (and board members) care enough to say what they think?
- It is unwise to make pronouncements or plans based on the voices of a few.
- Your Profile of Thriving presents results by age, years in the congregation, level of involvement, and marriage type. If your response rate is low, there may be insufficient participants to report back on some of these groups.

Marketing Plan

Your plan should grab people’s attention and get them caught up in the excitement and possibilities of the Thriving Synagogue Learning Tool.

- Emails and notices in the bulletin are insufficient for getting people to respond to a survey.
- Your campaign should include multi-modal, multimedia, multi-source, consistent, and persistent efforts to draw attention to the survey and why it is so important.
- **Research has shown that people need to hear a message in seven different ways before they take action.**
- Messages should not only be upbeat, but they should surprise and delight. They should say something different, something that catches people off guard or makes them smile, something that catches on like a tune or image you cannot get out of your head.
- You have to believe that Thriving Synagogue Learning Tool is as important as your capital campaign. In fact, we suggest it is more important because it concerns the people (your most precious asset) and not just the place.
- One of the core challenges identified in Thriving Synagogue research is overcoming apathy. This plan is the antidote to apathy.

Core Message

- Make the Thriving Synagogue Learning Tool your own by adding a tagline. “Your Voice, Our Future,” “Everyone Counts,” or “Be counted!”
- Express the message in your own words. Just saying the survey is important or it is for the future of the synagogue does not inspire action. A few suggestions:
 - “You own this place; you have the right, privilege, and obligation to have your voice heard.”
 - “A congregation-wide survey is the mark of a self-reflective organization that is open to input from its members. This is what we strive to be.”
 - “Until we know where we are, we can’t know where to head. The survey tells us the former, and then together we shall figure out the latter.”
 - “We are a single congregation but comprised of many different groups: leaders and members, men and women, younger and older, new members and veteran members, weekly participants and annual participants. The survey shows us who we are sum total — where we see things in the same way and where we differ in our views.”
 - “In committing to doing the survey, we agreed to share results with the congregation and to use these results. We can fulfill this obligation only when we hear from all of you.”
 - The survey gives us all a peek into the life of our congregation. Do you want to know the extent to which members and participants:
 - Think this place is alive or apathetic?
 - Feel like outsiders or like they belong here?

- Trust synagogue leadership and believe there is a healthy inflow of new leaders each year?
- See the synagogue as a sacred place and find meaning in services?
- Feel like they have a community here?
- Believe the synagogue runs smoothly and has a strong future?
- Feel caught by surprise when changes come?
- Are excited about the future of the congregation?
- This information is a first step toward building better connections, higher spirituality, stronger operations and leadership, more vitality, and a bigger future.”

Timing

- As you plan to launch your survey, consider the effort it will take to develop and implement your plan to create buzz.
- Take advantage of upcoming events or activities that offer opportunities to publicize the survey. For example:
 - Planned mailings such as the newsletter or High Holiday tickets
 - Scheduled events that include large segments of the congregation (holiday celebrations, congregational meetings, religious school graduation, galas, etc.)

Approaches

Below are suggestions and examples intended to stimulate your own thinking about the approaches you can take to create buzz. Figure out what you can do and do best in your setting. You cannot do all of these things, but you can do more than you imagine.

Reach People Through Multiple Modes

- The *minimum* effort requires four types of email communications:
 - A heads-up email that announces that the survey is coming
 - A launch email that includes a link to the survey
 - A weekly reminder email (with survey link)
 - A thank-you email for all who participated
- The easiest thing to do when you get an email from your synagogue is to delete, delete, delete. You will need to use some modes that cannot be deleted.
 - Place a clever, bright sign at the entrance or in the lobby.
 - Post a thermometer (like United Way) that displays your growing response rate.
 - Have different people make announcements at every meeting or event that takes place inside or outside of the building.
 - Give people stickers to wear that indicate they have filled out their survey.
 - Have children in the religious school make posters about how everyone’s voice counts (a study of grassroots democracy).
 - Hold a kick-off event as you might for your capital campaign.
 - Connect the survey and its purpose to the nearest holiday or build on a holiday celebration.
 - Put messages out on social media (Twitter, Facebook, etc.). Post the response rate each week or post a question a day from the survey.

Include Multiple Sources of Information

- Have different people speak up on the importance of the survey.
 - Clergy, committee chairs, leaders, beloved people in the synagogue, famous members, or members with a sense of humor.
 - Create a one-minute video of different people, including opinion leaders, saying “please do this.” Post on the website, send out links, run on the monitor in the lobby.
 - Have members of the board call every congregant. Or have your membership or engagement committee reach out to members one-on-one. Calls are more effective than emails.
 - Collect and publicize testimonials from people who have filled out their survey — how easy, interesting, and important it was.

Look for Leverage Points and Incentives

- Show progress in the response rate. A thermometer on the website, in the building, or in the newsletter can serve to remind and to motivate.
- Explain how you will be using the results. People are more inclined to participate if they know that it will make a difference.
- Offer an incentive for filling out the survey (a special place at *oneg* or *Kiddush*, an opportunity to enter a raffle for preferred parking during the holidays, amnesty on synagogue library fines, a token gift coupon for the gift shop).
- Hang a large poster on a wall in the synagogue with the title “I took the survey.” Have board members prime the pump by signing and then let other respondents sign. Seeing the specific names and the number of names will get others to join in.

Think About Different Target Audiences in Your Congregation

- Segment your population and figure out the best message for each unique group.
 - How would you best appeal to the Men’s Club, Sisterhood, parents in the religious school, daily minyan, Shabbat regulars, those involved with your committees (e.g., social justice, Israel action, environment, engagement), or participants of all ages involved in Jewish education?
 - Example: To date, men have a significantly lower rate of participation in the survey than women. Don’t let that happen in your congregation.
 - Example: A child’s education is paramount for parents but parents are often part of a drop-off culture. Remind them that they have chosen this place for their child’s education and it is time for them to have a voice.

Use a Variety of Locations

- Reach people wherever they congregate: in the parking lot, lobby, at the coffee machine, in the library. Catch them at religious school or preschool pick up and drop off; during their child’s bar mitzvah tutoring or during religious school.
- The survey is open access and can be entered from any computer or tablet with internet access. You can easily make the survey available to people throughout the building, in their homes, and at the local Starbucks.
 - Set aside a computer in the library for survey participants.
 - Set up laptops or tablets at the Sunday morning café.

- Have youth group members bring laptops to older members of the community and help them access and fill out the survey.
- Put the link on every communication—signs, emails from rabbis, notes home from school, weekly calendar, website, etc.
- Let people use the school’s computer lab during off-hours to complete their survey.

Develop Leadership for Creating Buzz

- If you have a member of the congregation who excels at writing, works in marketing or publicity, or has a great sense of humor or imagination, add him/her to your leadership team to oversee buzz creation.
- If you have an engagement or membership committee of the board, make them the arms and legs of this effort. If you do not have such a committee, use this as an opportunity to build interest in one.
- Cultivating such talent and committee structure builds capacity for your synagogue that will serve you well beyond the Thriving Synagogue Learning Tool. Possibilities for creating buzz are unlimited.

The ideas presented above are suggestions intended to inspire your own thinking. You do not need to do all of these, and you do not need to do these specifically. But, for a successful survey, you do need to do something.

- Use your imagination, past experience, and knowledge of the congregation to figure out the myriad other ways you might reach people and nudge, encourage, urge, or inspire them to participate in the survey. Then let us know what you did, and we shall add your ideas to this starter list.

Sample Communications

Sample Email Announcement

Dear [SYNAGOGUE] Member,

We are excited to announce that [SYNAGOGUE] will be participating in a program called the Thriving Synagogue Learning Tool funded by UJA-Federation of New York. The program will help us better understand where our synagogue excels and where we can do better.

UJA-Federation of New York is working with the Social Research Lab at the University of Northern Colorado to measure how synagogues thrive. A thriving synagogue is vital and alive. It is imbued with a sense of purpose, activity, and energy. This will be a vehicle to help our synagogue set a new course!

What are the benefits to our synagogue for participating?

Our synagogue will:

- ♣ Learn our profile of thriving and identify areas that merit appreciation and celebration as well as areas that call for planning and action.
- ♣ Receive expert coaching in understanding our results and applying them to plans and action.

On [Date], you will receive a brief survey.

(15 minutes of your time!)

PLEASE COMPLETE THE SURVEY ASAP.

Thank you for listening and participating,

Sample Heads-Up Email Just Prior to Launch of Survey

Dear Friends,

Recently we announced that [SYNAGOGUE] is participating in a new program sponsored by UJA-Federation of New York to help us better understand where our synagogue excels and where we can do better.

The invitation to the survey will arrive in your inbox tomorrow, and the subject line will be “[SYNAGOGUE] Thriving Synagogue Survey.” This survey is very important to us and its usefulness to our synagogue is dependent on the honest answers and participation from all members of our synagogue.

Your individual responses to the survey will remain confidential and only the Social Research Lab at the University of Northern Colorado research team will have access to them. Neither the synagogue nor UJA-Federation will have access to data from individuals. Only aggregated results will be reported. The survey will not evaluate synagogue staff, lay leaders, or volunteers.

We are committed to sharing results with you as we work to make [SYNAGOGUE] the best that it can be. Please feel free to reach out to us with any questions.

Thank you in advance for your participation in this important survey.

L'shalom,

Reminders to Complete the Survey

Sample #1

Dear [SYNAGOGUE] Member,
Just a reminder to fill out the congregation survey.

We are pleased that many of you have already replied and we hope that we will receive many more responses.

Here is a link to the survey: [LINK]

Please contact us if you have any further questions.

Sample #2

Dear [SYNAGOGUE] Member,
There's still too much snow on the ground and it's cold outside. Seems like the perfect time to curl up someplace warm and complete your [SYNAGOGUE] Thriving Synagogue Survey!

The survey is a central part of an effort [SYNAGOGUE] is making to better understand where we excel and where we can do better.

Your voice is important. The greater the number of members and participants who complete the survey, the more valuable the results. The survey should take about 15 minutes. To begin, click on the link below.

[LINK]

If you have any questions or concerns about the survey, please be in touch.