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SYNERGY

INNOVATIONS AND STRATEGIES FOR SYNAGOGUES OF TOMORROW

THE SYNAGOGUE EXECUTIVE DIRECTOR: A CHANGING ROLE FOR CHANGING TIMES

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NEW YORK



**THE ROLE IS
STRUCTURALLY,
STRATEGICALLY,
SOCIALY, AND
POLITICALLY
UNIQUE — AND
EXTRAORDINARILY
SITUATIONAL.¹**



Through its SYNERGY department, UJA-Federation of New York identifies and examines the attributes that enable synagogues to thrive. Today, we find ourselves in a rapidly changing landscape that requires synagogues to adapt, provide high-quality and compelling services, manage its staff and use limited resources effectively, and embrace 21st-century systems. Clergy, educators, administrative staff, and lay leadership must work together to meet these challenges and fulfill the sacred purpose of the congregation across the business and operations as well as engagement and strategy. The executive director is a key role that isn't currently set up for success.

As you read through this report, we cannot guarantee that your congregation will bring on the perfect executive director or administrator (ED/A). Rather, we present useful data and observations, raising important questions for congregational leaders about how to maximize the executive director's role. We hope this report guides each of you in exploring the best ED/A role for your congregation in a time of great change in congregational life. We also hope to engage key leaders in thoughtful conversation about how your congregation makes decisions and defines functional responsibilities, management, and leadership roles. The goal is a stronger, more effective synagogue that better uses the skills and talents you have and continues to develop the leadership you need, especially when it comes to the ED/A role.

Bruce Wexler

Chair

SYNERGY, UJA-Federation of New York

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¹ Bennett, Nathan, and Stephen A. Miles. "Second in Command: The Misunderstood Role of the Chief Operating Officer." Harvard Business Review, May 2006. <https://hbr.org/2006/05/second-in-command-the-misunderstood-role-of-the-chief-operating-officer>. This quote could have been said about the executive director role, but it happens to be a quote about the COO role.

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INTRODUCTION

WHY THIS STUDY NOW?

The synagogue world is part of a rapidly changing Jewish community landscape and synagogues are not adapting quickly enough. It has become almost axiomatic in synagogue management literature² to emphasize that to thrive today, synagogues must:

- **Adapt and be nimble.** Congregations and their staff and lay leadership must become proactive change catalysts to meet new challenges and opportunities.
- **Provide high-quality services.** Congregations must meet the needs of diverse Jewish communities with trained and skilled professional leadership, sound operations, current technology, and cutting-edge programming.
- **Operate efficiently.** Congregations should be effectively managed, use limited resources wisely, review priorities regularly, provide clarity on the roles and responsibilities of staff and lay leaders, and share an understanding of goals and vision.

A professional and skilled executive director or administrator (ED/A) with a well-defined role is a vital part of making sure that synagogues have the relevant expertise and infrastructure to respond effectively to current and future needs. At its best, the ED/A role allows each synagogue's leaders to focus on their core functions, ensuring that the synagogue continues to adapt and evolve to further its sacred purpose.

The trends below are affecting an increasing number of synagogues — but what is driving these trends? The adverse impact of these trends on synagogues led us to explore the changing ED/A role.

- Many synagogues experience a rapid turnover of ED/As. Turnover is disruptive, affecting the congregation's ability to hire qualified professionals who come to believe that the synagogue is not adequately prepared to successfully use someone in that role.³
- In tough economic times, synagogues may believe they can save money by downgrading the senior administrator position. We've seen a pattern of congregations hiring candidates with a significantly lower salary or weak benefits, even if it means they end up with limited skills and experience.⁴
- Even when the congregation is not looking to downgrade the role, some synagogues have difficulty finding qualified people in a shrunken labor pool of top-quality Jewish professionals.

As a result of these trends, many synagogues have significant operational and program needs they are not addressing. Given the potential impact of the ED/A role, it is perhaps surprising to find so little written about it as part of a larger story of the synagogue as an organization or about the fundamentals of synagogue management. The literature on managing a synagogue tends to focus on lay-professional relationships, particularly emphasizing governance issues around the roles of lay leaders and clergy. Much of what has been written about the ED/A role comes from professional organizations — for instance, the National Association for Temple Administration (NATA) and the North American Association of Synagogue Executives (NAASE). This is in sharp contrast to the church world, where you'll find many books and articles about the top two church administrator roles, the church business administrator and the executive pastor.⁵

This study is an important step in sharing information about the ED/A role and in addressing issues to maximize it.

² See Herring, Hayim, *Tomorrow's Synagogue Today: Creating Vibrant Centers of Jewish Life*, Herndon, VA: The Alban Institute, 2012; Teutsch, David, *Making a Difference: A Guide to Jewish Leadership and Not-For Profit Management*, Wyncote, PA: RRC Press, 2009; and Cousens, Beth, *Connected Congregations: From Dues and Membership to Sustaining Communities of Purpose*, New York: UJA-Federation of New York, 2013.

³ See Turnover in the Field report, National Association for Temple Administration (NATA) 2009.

⁴ Some of the largest and best-resourced congregations are an exception. With expensive salary and benefits packages, they hire people with considerable for-profit experience, many with MBA degrees, rather than those who come out of the Jewish professional world. Our report did not study this small subset.

⁵ The bibliography includes synagogue and church management materials we reviewed for this report.

THE GOALS OF THIS STUDY

- Gain a deeper understanding of the state of the ED/A role and the internal and external factors that affect synagogue life and ED/As.
 - Uncover ideal key functions of the ED/A role and expose the expectations that exist among synagogue leadership about it.
 - Define technical and interpersonal skills required to meet the specific needs of a congregation and address functional priorities for the ED/A role.
 - Build on professional development and support opportunities, consider enhanced opportunities for current ED/As, and create a training pipeline for potential candidates for this role.
 - Identify areas of possible collaboration across sectors to strengthen the ED/A role and the congregations they serve.
-

DEFINITION

The individuals this study researched were senior administrators in their congregations, regardless of their specific functional responsibilities and authority. Most synagogues use the titles executive director or administrator interchangeably for the senior administrative role. This report refers generically to executive directors or administrators (ED/As), but we use actual titles when quoting individuals.

Sentiments are mixed on whether the titles reflect authority, and we explore levels of responsibility later in this study. As noted by a rabbi in a suburban reform congregation, “Last year our administrator attained the title executive director, and I fought for her to attain that. Because even though her role hasn’t changed, I think there’s respect, there’s *kavod* that should be there, and I don’t think it was with the title administrator.

EXECUTIVE SUMMARY

Synagogues are engaged in sacred work, and in the ideal world, the synagogue team is dedicated to furthering this sacred purpose by effectively executing their unique roles. And yet, we sense that key members of the professional and lay team feel stymied by inefficiencies and confusion over roles and responsibilities — especially that of the executive director or administrator (ED/A). This report seeks to better understand today's ED/A role, identify areas in which synagogues can enhance the role, and consider possible next steps to help synagogues and their leadership.

The report builds on the results of a 2017 online survey of 500 respondents from across Conservative, Reconstructionist, Reform, Orthodox and unaffiliated congregations, in-person and phone interviews, in-person focus groups with lay leadership and professionals, resulting in 100 unique perspectives of movement leaders, synagogue and church management experts, and background research.

The central finding of this research is that the current ED/A role is hampered by a lack of clarity around function, governance, management, and leadership authority that exists under its umbrella. This confusion hinders ED/As and the congregations they serve and is further exacerbated by enormous challenges facing synagogues today.

KEY FINDINGS

Changing times. Many factors that affect synagogues, forcing a reconsideration of roles, include:

- Changing membership demographics, with different expectations of community, Jewish engagement, and organized religion.
- A shift in focus from programs to engagements, with a greater emphasis on creating deep relationships.
- Economic stresses and limited resources, forcing ED/As to spend more time creatively resourcing revenue and managing facilities.
- Inadequately trained or insufficient staff to meet synagogue needs.
- Technology needs that are expensive to keep up with.
- Inefficient and sporadic volunteers that add to the responsibilities of the ED/A.

Changing roles. As the ED/A role evolves to meet changing synagogue needs, so does its core responsibilities and relationships with synagogue leaders.

- In response to changing times, an ED/A's functional responsibilities require different competencies and technical skills. While the ED/A should be responsible for basic operational and practical business management functions, it's not clear how much they should also be responsible for strategic, leadership, and engagement functions.
- Positive synagogue relationships with the rabbi, president, educators, and other senior lay and professional leadership are crucial to the ED/A's success but may be waylaid by a lack of clarity around the team's roles and boundaries.

Synagogue management. Synagogue management models are not consistent across organizational charts and ED/A titles, contributing to a lack of clarity.

- Ultimate decision-making authority, titles, and supervisory relationships are not clear.

Professional development. Training and mentoring is necessary to the success of the ED/A.

- Synagogue leaders affirm that while ED/As have significant and diverse volunteering credentials, education, and professional experiences, they need ongoing professional development to thrive in an ever-changing environment.
- Many ED/As are not able to find the time or funding to pursue professional development opportunities. When they do, many report that programs do not provide the professional development they need to be successful.

CONSIDERATIONS: In the report's last section, we suggest next steps and ways that leaders can better support the ED/A role to help synagogues thrive.

Among the most important considerations, synagogues should:

- Establish realistic and transparent parameters for the ED/A role, including common language to address core functions and whether ED/As should have a minimum set of hard and soft skills.
- Provide professional development training and support for the ED/As to develop minimum skills and develop responses to changing responsibilities.
- Explore creative approaches for congregations with fewer resources that might not have access to a full-time executive director.
- Develop healthy relationships between ED/As and key lay and professional leaders.
- Create a career path for Jewish professionals to become ED/As.

The Appendix includes supplemental reference materials and concrete exercises for ED/As and synagogue leaders looking to develop a realistic, transparent ED/A role.

METHODOLOGY

This report reflects in-depth survey and interview research about how the ED/A role fits into the larger synagogue organization. Most of the data for this report comes from a series of focus groups, interviews, and survey responses from senior rabbis, educators, ED/As, and synagogue presidents — or the synagogue leadership⁶ — that took place between May and September 2017. Additional information comes from interviews with representatives from national movement organizations. Synagogue leadership and movement leaders represent Reform, Conservative, Reconstructionist, Orthodox Union, and unaffiliated congregations.

In May 2017, UJA-Federation and several of the national movements disseminated a survey to synagogue leaders from the four movements and unaffiliated congregations nationwide.⁷ We asked survey participants to reflect on their roles and responsibilities, especially around operations and management, and to respond to a series of questions about what they see as ideal attributes of the ED/A role. We asked ED/As additional background questions about themselves and their perceptions of their role, skills, and relationships.

We received more than 500 responses, the majority from the Northeast, where the New York metropolitan area was particularly well represented, and synagogue leaders from Reform and Conservative congregations. We also received a few responses from synagogue leaders from Reconstructionist, Orthodox, and unaffiliated congregations. Those who responded included 201 ED/As, representing about 21% of the total ED/As across the four movements in North America. This largely exploratory survey included both open-ended and directed questions. The trends suggested by the survey were further explored in individual interviews and focus groups.

In summer 2017, we hosted a series of focus groups and individual conversations with more than 100 synagogue professionals and presidents in Long Island, New York City, Westchester County, and a few other geographic areas. Of the participants, 60 were ED/As. Focus groups were diverse in membership size, denomination, budget, and urban or suburban locations. Most of these focus groups were organized by role in the synagogue: rabbi, president, executive director, or education director. Three of the focus groups comprised synagogue leadership teams.

In focus groups, we asked presidents, rabbis, and educators to consider their expectations for the ED/A role around core functions, governance, authority, and leadership. ED/As who participated were also asked to reflect on their relationships with members of the synagogue team and the barriers they face in their role. We asked all participants to describe core ED/A functions and what an ideal ED/A role might look like. We recorded and transcribed focus group interviews and include excerpts of the focus group guides in the Appendix.

Additional information for this report came from interviews with synagogue and church management experts, as well as background research from a review of publications, surveys, and websites within the Jewish community and into the church management space. A list of all of the organizations interviewed and the background organizations are included in the Appendix.

⁶ Our report's authors acknowledge that the synagogue team includes cantors, early childhood directors, and other professionals. Due to limited time and resources, we determined that each of the four roles in the study would serve as the voice of the functional areas they represent. Thus, senior rabbis represent all clergy, and senior educators represent all program and education staff.

⁷ The study reflects the voices of a broad swath of synagogue leadership with the assistance of United Synagogue of Conservative Judaism (USCJ), Union for Reform Judaism (URJ), RRC/Reconstructing Judaism (RRC/RJ), Orthodox Union (OU), North American Association of Synagogue Executives (NAASE), National Association for Temple Administration (NATA), Association of Reform Jewish Educators (ARJE), Jewish Educators Assembly (JEA), and Jewish Education Project (JEP).

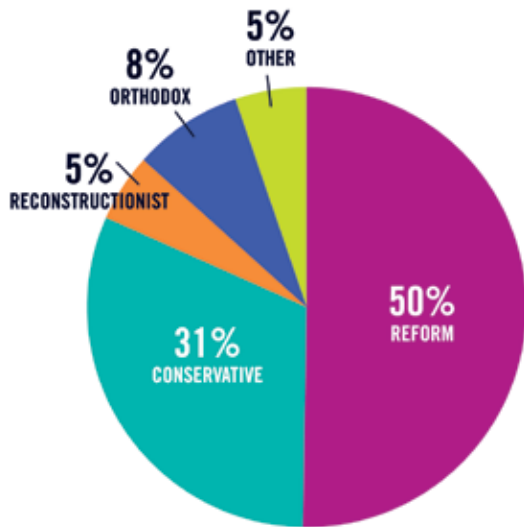
EXECUTIVE DIRECTORS — WHO ARE THEY?

Our research uncovered basic background information about the universe of synagogue ED/As

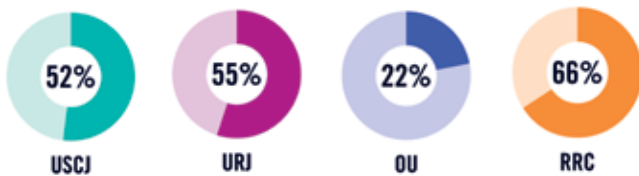
CONGREGATIONS SERVED BY ED/AS

As of October 2017, some 950 individuals serve in administrative roles in North America, identified by the movements as serving approximately 2,000 URJ, USCJ, RRC/RJ, and OU congregations.⁸ Thus, fewer than 50% of all congregations have some level of administrative paid support.⁹ Breaking this down further, approximately 55% of Reform congregations, 52% of Conservative congregations, 66% of Reconstructionist congregations, and 22% of Orthodox congregations pay individuals in an administrative role. The majority of interviewees and survey respondents with the ED/A title come from Reform and Conservative congregations.¹⁰

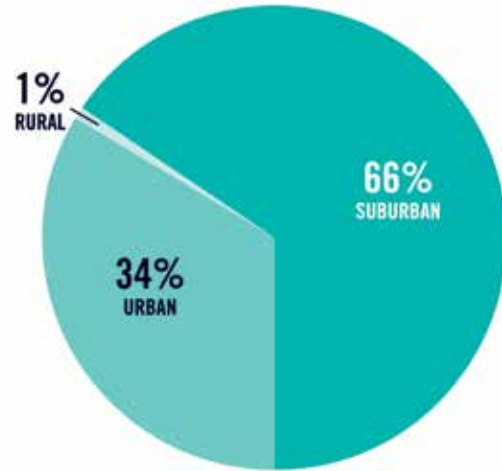
Given the overall demography of the Jewish population in the United States and Canada, it is not surprising that the vast majority of ED/As are from urban or suburban congregations.¹¹ In addition, most work in congregations that include between 200 and 999 households.



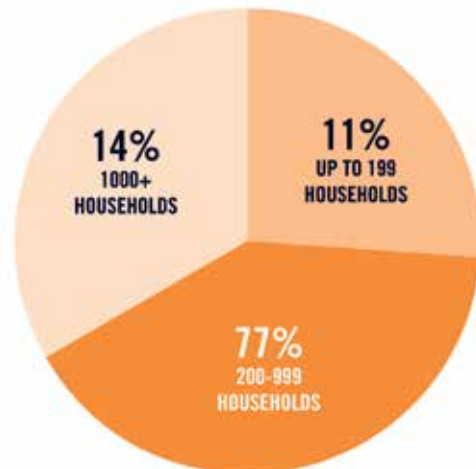
Percentage of ED/As by each movement out of 100% ED/A group



Percentage of ED/As in each movement out of total percentage of synagogues in each movement



Percentage of ED/As from urban, rural, and suburban congregations



Percentage of ED/As from congregations of different sizes

⁸ The 2013 Pew Study also shows that Reform Judaism continues to be the largest Jewish denominational movement in the United States. One-third (35%) of all U.S. Jews identify as Reform, while 18% identify with Conservative Judaism, 10% with Orthodox Judaism, and 6% with a different denomination, such as Reconstructionist or Jewish Renewal. About 3 in 10 American Jews say they do not identify with any Jewish denomination. See Chapter 3 of “A Portrait of Jewish Americans,” Pew Research Center, October 1, 2013, <http://pewrsr.ch/16IN5U4>.

⁹ Movements reported approximate figures in October 2017 and include full- and part-time administrators, potentially including those who are part of the administrative staff and even a volunteer administrators and lay leaders. The survey data includes only individuals with executive director, administrator, or similar titles and excludes people with limited functions, such as membership directors or assistant executive directors, who may be included in the movement data.

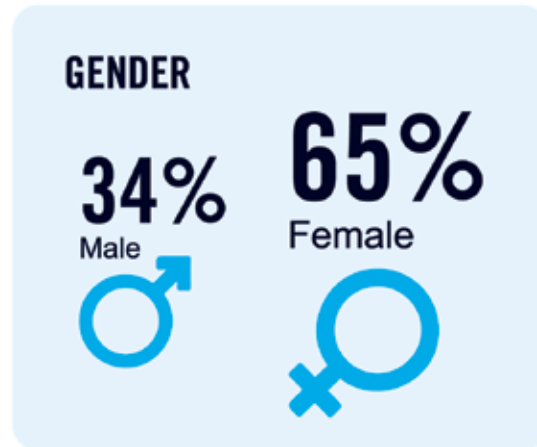
¹⁰ Currently, two movement-based organizations represent ED/As, although not all individuals in these roles belong to them. The National Association for Temple Administration (NATA) comprises some 325 ED/A active members serving Reform congregations. The North American Association of Synagogue Executives (NAASE) has approximately 240 ED/A active members serving Conservative congregations. While neither the RRC/Reconstructing Judaism nor the Orthodox Union currently offers independent professional associations for their ED/As, they serve them directly, and some of them participate in NATA and/or NAASE programming.

¹¹ According to a 2013 Pew Research Study project, 49% of U.S. Jews live in urban areas and 47% live in the suburbs. Also, 43% of U.S. Jews live in the North East. See “A Portrait of Jewish Americans,” Pew Research Center, October 1, 2013, <http://pewrsr.ch/16IN5U4>.

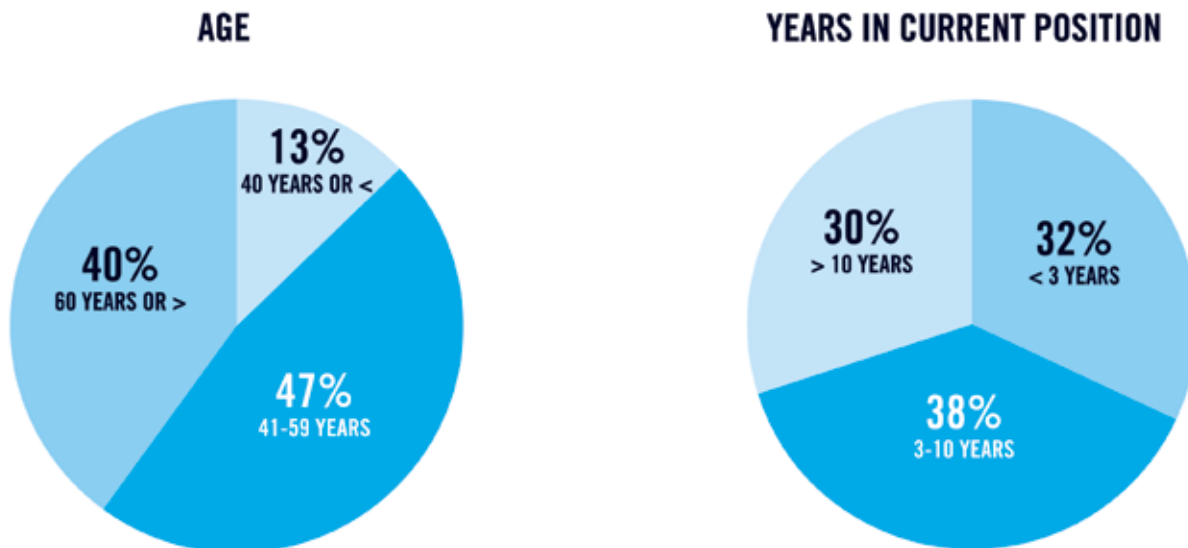
PERSONAL ATTRIBUTES OF ED/AS¹²

About two-thirds of all ED/As are women, with the percentage of women in this role increasingly significantly over the past 25 years. We see this pattern in Reform, Conservative, and Reconstructionist congregations.¹³ Our research did not explore the implications of this trend on role functions, authority, and status.¹⁴

Another important trend is that ED/As are generally experienced adults when they enter the field: More than 85% of those surveyed were over 40 (see chart below). We did not focus on why¹⁵ this is or what the impact of an older population might be on a synagogue. It might be worth exploring the effect of “new” ED/As who are older than the young adult population that congregations are struggling to attract. Age may correlate with shorter tenure in the role.



Gender breakdown of ED/As



Age breakdown of ED/As

Years in current position of ED/As

¹² Survey data is consistent with executive director-focused movement-based surveys. See, e.g., USCJ’s 2017 Professional Staff Survey; NATA Compensation Benefits Report Executive Summary Report, conducted by ARI (October 2017); and the Results of 2016 OU Executive Director’s Survey, by Michael Karlin, November 2016, https://docs.wixstatic.com/ugd/a589d8_0ef9115c12f74b63bd1d96cf1dd75c27.pdf.

¹³ It is not known what the gender breakdown is in OU congregations. There is a high percentage of women Jewish professionals generally, including synagogue clergy, educators, and even volunteers. See Cohen, Steven M., *Profiling the Professionals: Who’s Serving Our Communities*, New York: Jewish Communal Service Association of North America, 2010, http://www.acbp.net/pdf/pdfs-research-and-publications/Jewish_Communal_Professionals.pdf; Paulson, Michael, “Where Have All the Men Gone?” *The Boston Globe*, June 22, 2008, http://archive.boston.com/news/local/articles/2008/06/22/where_have_all_the_men_gone; and Tuhus-Dubrow, Rebecca, “Jewish Men on the Decline: Is Judaism Becoming Too Female-Centric?” *Slate*, June 24, 2011.

¹⁴ Some suggest that the trend toward more women in the ED/A field, as in other areas of synagogue life, results in lower salaries and benefits. NATA membership salary surveys over the past eight years reveal that women make less than men for positions that appear to be equivalent. This may be an area worth pursuing, because it can negatively affect who considers entering the field or why they choose to leave. See Eisner, Jane, “The Gender Salary Gap among CEOs at Jewish Non-Profits Is Getting Worse,” *The Forward*, December 12, 2017, <https://forward.com/opinion/389778/the-embarrassing-pay-gap-in-the-board-rooms-of-jewish-not-for-profits>, and Cohen, Steven M., *Profiling the Professionals: Who’s Serving Our Communities*, New York: Jewish Communal Service Association of North America, 2010, http://www.acbp.net/pdf/pdfs-research-and-publications/Jewish_Communal_Professionals.pdf.

¹⁵ There are possible explanations for this. A few of the younger ED/As we interviewed spoke about the difficulties of managing their family life with the demands of the position. Another reason may be that congregations deliberately seek candidates with significant experience.

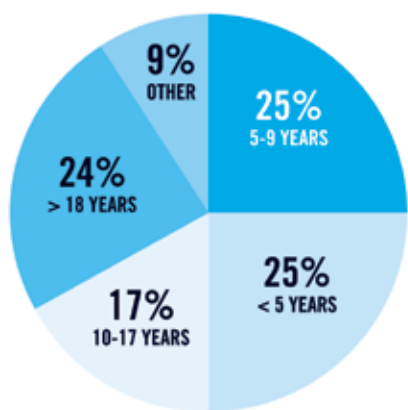
EDUCATIONAL, PROFESSIONAL, AND VOLUNTEER PATHWAYS TO THE ED/A ROLE

Synagogues generally hire clergy and educators after they attain specific professional training and academic degrees. As a result, synagogue leaders can make basic assumptions about their knowledge base and skills set.

However, there is no required degree or professional certificate to become an ED/A, and congregations cannot assume candidates for the position have a specific body of knowledge and synagogue-specific skills.¹⁶ On the other hand, ED/As come to the role with significant professional, educational, and volunteer experience.

ED/As earn a range of academic and professional degrees,¹⁷ with experience working in corporations and both Jewish and secular nonprofits. Some also have had multiple paid roles in synagogues as program directors, membership coordinators, financial staff, and even educators (see chart below). Many ED/As spoke about relying on their educational and professional training in their current role. As one executive director said, “Prior to taking this position, I participated in a lot of management development opportunities, focusing on how to provide and take feedback in a constructive manner, having difficult conversations, etc. This has been extremely helpful. Additionally, my background on customer-focused improvements and understanding are what drives engagement. Two major issues in our organization.”

YEARS AS A SYNAGOGUE PROFESSIONAL



Breakdown of years in the field for ED/As

¹⁶ Both NAASE and NATA offer formal certification programs, and congregations can choose to hire a candidate who is certified and possesses defined set of skills and knowledge. Most job descriptions we reviewed did not refer to certifications.

¹⁷ A 2016 OU survey sent to 136 people asked about the highest degree earned by its members. Of the 46 who responded, 50% had attained a college degree, while 33% had obtained a master’s degree. The 2015 NATA survey found that 43.6% of its respondents had a bachelor’s degree, while 39.9% had a master’s or higher degree.

¹⁸ 72% of survey respondents said that volunteering is valuable to their current role.

ED/A EXPERIENCE



ACADEMIC

- ▶ Jewish Communal Service
- ▶ Not-for-Profit Management
- ▶ Accounting
- ▶ Business Administration
- ▶ Arts Management or Stage Management
- ▶ Jewish Studies
- ▶ Psychology
- ▶ Social Work
- ▶ Law
- ▶ Education



PROFESSIONAL

- ▶ Jewish camps, federations, JCCs and Hillels
- ▶ Jewish social service organizations
- ▶ Schools and other education centers
- ▶ Hospitals and senior centers
- ▶ Customer service/retail background
- ▶ Entrepreneurial ventures
- ▶ Theatres, museums and other arts organizations
- ▶ Special needs organizations
- ▶ Government—generally local
- ▶ Human resource management
- ▶ Social justice organizations
- ▶ Legal organizations
- ▶ Urban planning

Professional and educational experiences of ED/As

Many ED/As have volunteered with Jewish institutions, synagogues, and other organizations.¹⁸ A few have even been presidents of their congregation. As one executive director described, “Volunteering was the most valuable insight I got regarding the ways in which immersion in synagogue life would enrich me. When it came time to go back to work after raising my kids, I only interviewed at synagogues.”

INTERPERSONAL SKILLS OF ED/AS

The wide-ranging backgrounds of people who become ED/As provide important skills to respond to the complicated relationships and responsibilities of synagogue life. ED/As also bring to the role valuable interpersonal skills, personal commitment to the Jewish community, and generally positive attitudes about their work.

ED/As often describe their interpersonal skills and emotional intelligence¹⁹ as key to their success, including the ability to collaborate and listen, work well with teams, handle different personalities, lead from behind, manage crises, navigate social complexities, and make sound decisions (see chart below). Other members of the synagogue team also emphasize these skills as important for the ED/A role.²⁰

ED/A INTERPERSONAL SKILLS



Interpersonal skills of ED/As

¹⁹ EQ skills include curiosity, comfort with change, being a good listener, appreciating others, positivism, and self-awareness. See Bradberry, Travis, "Are You Emotionally Intelligent? Here's How to Know for Sure," Huffington Post, July 5, 2017, https://www.huffingtonpost.com/entry/are-you-emotionally-intelligent-heres-how-to-know_us_5952b6b8e4b0c85b96c65d4e, and Goleman, Daniel, *Emotional Intelligence: Why It Can Matter More than IQ*, New York: Bantam Dell, 2006.

²⁰ Congregations may find it difficult to accurately evaluate the quality of EQ skills any particular candidate possesses based on interviews alone. Our research uncovered congregations that make candidates go through EQ testing before hiring them. It may help the ED/A understand the EQ skills they have and those they need to develop to be most effective. EQ tests offer a range of costs and require different levels of professional explanation and support. Online tests can be more affordable than others that require a facilitator and can include multiday testing and evaluation.

KEY FINDINGS

Key study findings begin with the basic premise that synagogues have a sacred purpose, which successful ED/As effectively support and enhance. However, the study results suggest that confusion about the role creates barriers to the role's success at a time of enormous synagogue challenges.

The findings below came up repeatedly as particularly relevant to the work of the ED/A.²¹ We expound on these findings further in our report.

Changing Times
Changing Roles
Synagogue Management
Professional Development

CHANGING TIMES: MANY FACTORS AFFECT TODAY'S SYNAGOGUES, FORCING A RECONSIDERATION OF THE ED/A ROLE.

Both external and internal factors are forcing synagogues to think differently about their relationship to the Jewish community they serve, manage resource difficulties, and question how they understand (and misunderstand) the roles and responsibilities of professional and lay leadership.

Changing demographics. The changing Jewish community has new needs and expectations. Demographic changes in the North American Jewish community reflect broader changes in society — including more interfaith families, diverse family households, LGBTQ members, millennials with different views about synagogue membership, single adults, and those with disabilities. At the same time, local population shifts result from Jews moving to different neighborhoods, Jewish communities aging, and families staying in or moving back to cities, resulting in significant swings in membership, facility use and needs, and synagogue membership.²² These demographic shifts force synagogues to rethink how they engage members and nonmembers.

Shift from program to engagement. Many synagogues are turning their attention away from formal programs and toward ongoing engagement. There is an emerging consensus that adult Jews are not finding meaningful connections to their synagogue community through formal classes, committee work, and other traditional means. Instead, they seek deeper personal connections to their Judaism. Synagogues are responding by engaging members (and nonmembers) in new ways that include small groups and listening campaigns. Often, this approach is less hierarchical and clergy-centric than more traditional programming.²³

Synagogue leaders indicate that they have not thought through the possible impact of this relationship-building focus on roles and resources. In some congregations, member engagement is now primarily the responsibility of the senior educator, whose functional role is shifting with a title change to, for example, “director of lifelong learning” or “director of engagement.” For ED/As — some who currently supervise membership staff, program staff, and development directors also involved in engagement — the new focus of the educator on engagement may lead to functional role confusion.

Internal pressures. Economic stresses and limited resources can lead to additional challenges. This report is not the place to address the ways in which congregations are feeling significant financial pressures. But such pressures, widely acknowledged during the research phase, are affecting the role of the ED/A, who are asked to be creative and entrepreneurial about cost savings and revenue streams.

²¹ Key findings in this report are corroborated in the *NATA Journal: The Ever-Evolving Role of the Executive Director*, National Association for Temple Administration, Fall 2017, <http://natanet.org/wp-content/uploads/2014/05/NATAJournalFall2017.pdf>. See also *NAASE Journal: The Forum on Synagogue Management and Leadership*, North American Association of Synagogue Executives, Fall/Winter 2014, https://issuu.com/nhmstudio/docs/journal_brochure.

²² See “A Portrait of Jewish Americans”, 2013, Pew Research Center, October 1, 2013. <http://pewrsr.ch/16IN5U4>.

²³ For information about a focus on engagement, rather than programming, see Evans, Robert, and Bryan Schwartzman, “Where Everybody Knows Your Name: Small Groups, Connectivity and a Path Forward for Synagogues,” *EJewish Philanthropy*, July 31, 2014, <http://ejewishphilanthropy.com/where-everybody-knows-your-name-small-groups-connectivity-and-a-path-forward-for-synagogues>, and *Moving to the Leading Edge: A URJ Resource and Discussion Guide to Move your Congregation Forward*, Union for Reform Judaism, November 2016, <http://www.urj.org/sites/default/files/MovingtotheLeadingEdge.pdf>.

A particular stress point is facilities management. Many synagogue leaders described aging facilities that are expensive to maintain and lack the space for current needs. It is common for ED/As to spend significant time maintaining facilities and acting as rental agents in pursuit of supplemental income. As a rabbi of a small, urban congregation with an active rental program noted, “Our administrator does the duty of the executive director and also the building manager. The administrator has too many jobs and too many hats.”

Frustration around poorly trained staff is another common theme, especially around social media, finance, and membership management software. While ED/As are generally responsible for implementing and managing technology, some do not have the time or technical skills to do so, and most do not have adequate financial resources to bring in outside experts, upgrade equipment and software, or provide adequate training for in-house staff. In the interviews, some ED/As spoke about the stress of being responsible for constantly evolving technology, including member-tracking databases and social media.²⁴ A number of synagogue leaders believe there is an overall lack of good, skilled Jewish professionals for open positions, including senior operations positions.²⁵

Financial constraints play a major role in considering ED/A hires and other operations positions. A number of congregations with “administrators” explained that they had to move from a more strategic senior “executive director” position to a task-oriented, less strategic position for financial reasons. In general, the lay leaders who described this change did so with some regret that they were getting someone with less capacity and fewer skills, reflected in the lower salaries and weaker benefits they offered.²⁶ However, a few congregations, regardless of their financial state, said they wanted an administrator because they believe strategic thinking, leadership engagement, and other management functions are the responsibility of clergy or lay leadership.²⁷

When asked about his synagogue’s major challenges, one rabbi at a conservative suburban congregation said, it is “hard to pin down one challenge. One is an infrastructure/technology issue. We are so in the 1940s that it’s horrific. The second one is, our staff is just bad.”

Volunteerism and leadership. Congregations are struggling to find enough volunteers and individuals committed to leadership roles. Fewer volunteers have the skills synagogues need, including program logistics, communications, and hands-on tasks. As a result, ED/As are increasingly asked to take on the operational tasks that volunteers have previously managed.

Several rabbis make note of what stands in the way of the ideal executive director role:

“There are not enough staff or volunteers to get it all done.”

“Very difficult to get volunteers to take on responsible positions.”

“I fill in for lack of volunteers when things need to get done.”

“The structure that depends on volunteers leading many efforts is often fictional.”

It is also difficult for congregations to find people willing to take on leadership roles. At the same time, some synagogue boards have evolved from including small business owners, full-time volunteers, and people in the service professions to comprising more lawyers and finance people who want to run their synagogue as a corporation. These boards view the chair of the board as the CEO of the synagogue and often see the ED/A as the COO, following a corporate model of management. They expect a high level of professionalism and look to the ED/A to bring a significant set of business skills to the position.²⁸

²⁴ In these interviews, there is a sense that professionals rely heavily on younger clergy or educators or lay leaders. (Even 14- to 17-year-old members handle some of the social media in at least one congregation.)

²⁵ Brown, Scott, “The Jewish Professional Talent Shortage: Striving for Excellence,” EJewish Philanthropy, July 19, 2011, <http://ejewishphilanthropy.com/the-jewish-professional-talent-shortage-striving-for-excellence>.

²⁶ As the rabbi of an urban Conservative congregation explained, “[We] made the decision to hire an administrator because of the salary they could pay. Need someone to get things done, an implementer. Hope person might grow into a larger position as they grow and learn.” Another senior rabbi with an MBA described his role as the CEO, business head, and staff manager and deliberately hired an administrator instead of an executive director. That congregation did not need the administrator to have strong business and finance skills. Using the resulting cost savings, the rabbi wanted to hire a visionary educator.

²⁷ An educator of an urban Conservative congregation that recently hired an administrator explained, “We don’t want an executive director who has mission/vision under their purview. Really want the lay leadership to own that.”

²⁸ Perhaps this is one of the reasons that some of the largest and best-resourced congregations hire MBAs with significant corporate experience. Most congregations cannot afford to hire someone with this level of educational and professional experience.

And presidents make note of some additional barriers:

“Ideally, the executive director should have direct or indirect control over facility management, budget management, admin/custodial staff management, and fundraising.”

“Culture has been participatory, and lay leaders need to transfer to a professionally led congregation with a governing board.”

Moreover, the fact that most presidents serve for two to four years means that many synagogues experience significant leadership turnover fairly frequently, which often leads to a shift in strategic focus and management or governance styles. For example, while some presidents describe their role as being the CEO of the synagogue’s “business,” others express a desire to lead vision conversations and set strategic goals for the synagogue. The frequent rotation of lay leadership is often an area of frustration and angst for synagogue professionals. An executive director of a suburban congregation that experienced a difficult presidency commented, “The president gets turned over every two or three years, and then suddenly you’re with someone who you don’t really get along with. I mean, there’s a lot of relationships that you need to always be mindful of and keep staying on your toes in a way.”

The high turnover rate may also give the ED/A more authority. As one executive director from a suburban reconstructionist congregation said, “Because our leadership changes every two years, there isn’t an opportunity for any kind of power to be vested in that position.” Or, as another administrator from an urban Orthodox congregation noted, “When you have a weak leader, it’s to your advantage.”

CHANGING ROLES: AS THE ED/A ROLE EVOLVES TO MEET CHANGING SYNAGOGUE NEEDS, SO DOES ITS CORE RESPONSIBILITIES AND RELATIONSHIPS WITH SYNAGOGUE LEADERS.

In conversation after conversation, synagogue leaders recognize that the changing synagogue world is forcing them to change how they work and what they do. Many leaders wrestle with what these trends mean for professional and lay roles and wonder if current ED/A roles can meet the challenges before them. Synagogues leaders want to identify core functions that can make the ED/A role most helpful. They believe that the ED/A has an important supporting role in advancing the synagogue’s mission — but is that it?

Many synagogue leaders start with the premise that the ED/A’s functional priorities must be around operations, limiting them to the strategic vision and priorities set by other leaders in the congregation. As a reform movement leader said, the “rabbi is the chief engagement officer. ... Ideally, the executive director is the partner in everything and potentially the backbone of the team. The foundational structure of any synagogue working well. Good administration, financial, good communication skills. All has to be in alignment with the mission/vision for which the rabbi and president are responsible.”

Other synagogue leaders believe that their congregations are better served by a more expansive ED/A role that includes strategic, engagement, leadership, and management functional responsibilities.²⁹ As a senior rabbi noted, their executive director has to spend “too much time on emergencies and details, not enough time to be visionary rather than reactionary.”

As the report turns to practical consideration of the ED/A’s priorities, core functions, and responsibilities, we find two distinct functional areas that define the ED/A role:

- Daily operations and administrative management — or “administrator” functions
- Strategic planning, leadership, and membership engagement — or “executive director” functions

²⁹ This is not to imply that only the program work is “sacred” and the business side is “profane.” Such lay leaders as the treasurer, administrative staff, and facilities staff are part of the synagogue team working toward a sacred purpose. The distinction made here is about the particular functions of each role that collectively support the synagogue’s sacred purpose.

ED/As as “administrators” focused on operational work

Synagogue leaders consistently talk about the importance of effective and efficient management, while recognizing that limited resources make this difficult to achieve. Almost to a person, presidents, rabbis, and educators described an overwhelming amount of “business oriented” work they have to do.³⁰ They believe this work significantly impedes their ability to focus on more important priorities. For example, many presidents complain they had to focus on aging facilities and day-to-day finances, instead of the mission. As one president from an urban conservative congregation said, “We mostly talk about the building. Our synagogue is a business. ... There’s no conversation about: What’s our vision on social justice. What’s our vision on growing the community?”

Synagogue leaders look to the ED/A role to respond to these operational challenges. Recently, an urban conservative congregation hired a new administrator, and the senior rabbi explained that she hoped this would “take the burden off the educator,” who was carrying too much of the synagogue’s operational tasks on her shoulders.

Many synagogue leaders describe the ideal ED/A role as focused on operational functions to professionalize administrative processes, develop sound financial reporting, better maintain buildings, successfully manage events, and communicate without error. Depending on staff size, they expect the ED/As of their congregations to supervise or do more to ensure that daily operational functions are handled well. A rabbi of a progressive urban congregation said that she believed her executive director was great because of her “attention to detail, passion about mission, strong administrative skills, and was a great team player.”

ED/As know that effective synagogue management is a top priority, and much of their time is spent on operational issues — financial reporting, human resources, facilities and events management, membership management, and technology — which require strong technical and management skills. Given limited resources, competing priorities, multiple responsibilities, and an enormous volume of work, many ED/As are scrambling to get this work done well.³¹ Some ED/As identify facilities management as particularly burdensome,³² while others are particularly concerned about other operational tasks (see chart below).

EDs/As SPEND SIGNIFICANT TIME ON OPERATIONAL TASKS



EDs/As WOULD LIKE TO SPEND LESS TIME ON



How ED/As spend significant time or would like to spend less time

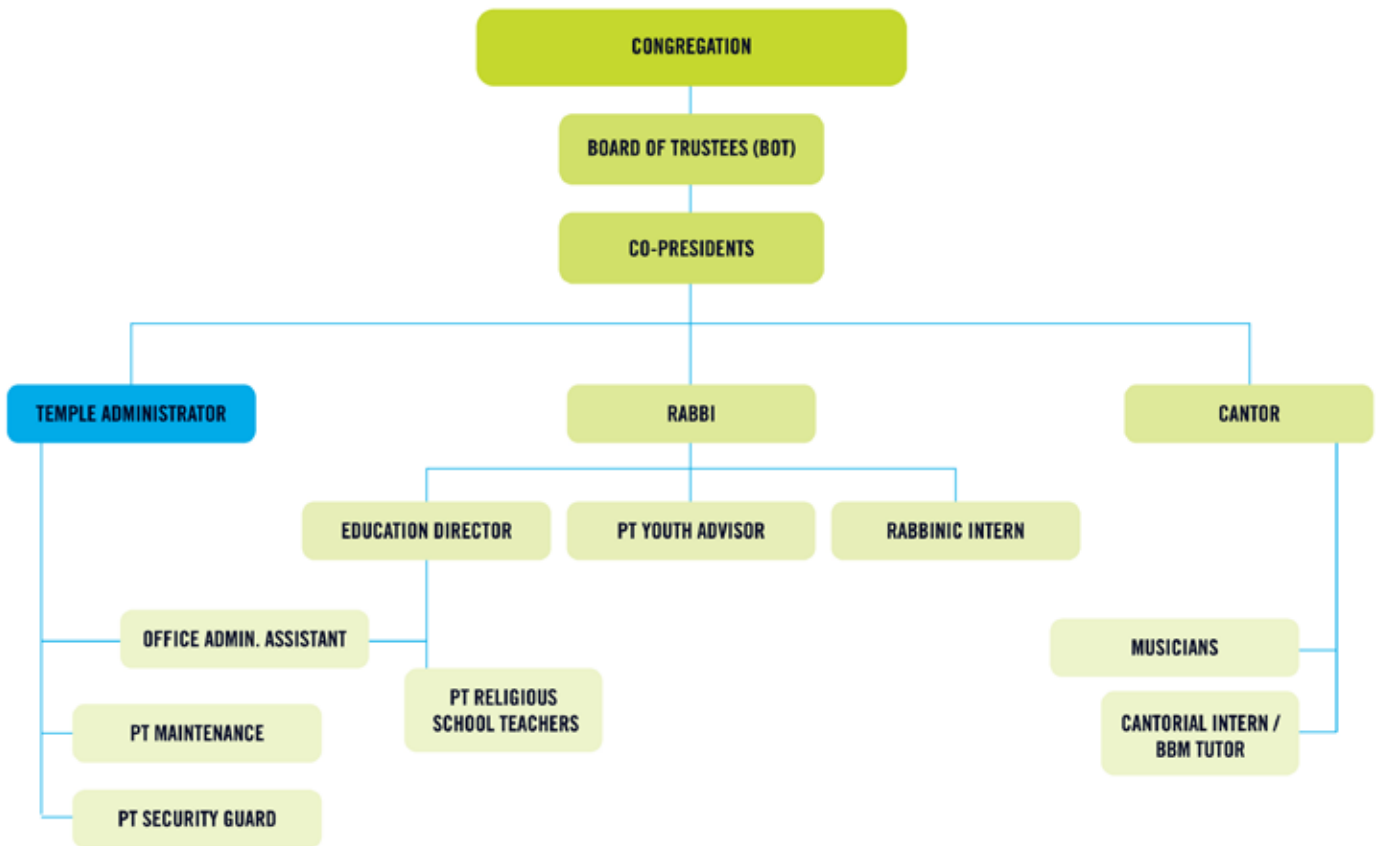
³⁰ In responding about the top three places in which they spend too much time, presidents list facilities maintenance, day-to-day financial management, and staff management. Rabbis also mention facilities maintenance, synagogue technology, and congregational programming management and logistics. Educators list facilities management and synagogue technology, as well as High Holiday logistics.

³¹ As one executive director commented, “Day-to-day issues that come up need to be addressed. Staff and lay leader needs that to take priority.”

³² Executive directors expressed similar concerns in a 2016 OU survey, indicating they spend too much time on building-related issues, scheduling, and other general administrative tasks.

Many smaller congregations with fewer resources feel fortunate if they have a competent “administrator” who effectively manages their operational needs. While less common, some larger congregations have a person in this role. The organizational chart below is from a small, urban congregation with an “administrator.” Other synagogues with someone in the ED/A role, regardless of actual title, share common characteristics: The “administrator” role generally supervises a small staff,

including general office and maintenance, with core functions related to day-to-day office management, basic financial reporting, membership, and facilities management. The role is heavily oriented around tasks like daily operations, and not strategic functions. Whereas the ED/A role as operations leader is clearly articulated, it can be satisfying for the right ED/A with complementary skills to delve into the strategic.



Organizational Chart of a Synagogue with an “Administrator”

ED/A as “executive director” with a broad portfolio

At the same time, other congregational leaders expressed their desire to have an “executive director” in a leadership role with operations, engagement, management, and strategic responsibilities.³³ This is heard more commonly from larger congregation leaders and congregations with the capacity to hire specialized staff and resources. A conservative movement leader said, “The big difference between an administrator and an executive director is about proactivity. The executive director is a leader, innovator, change agent.”

Most ED/As desire this type of position, which they believe makes for a more effective synagogue professional and personal satisfaction by connecting their work and their personal commitment to the Jewish community (see chart below). An executive director said, “I finally found the home in the career I should have been all along, which allows me to combine a business background and a Judaic background. ... I have the best of all the worlds this way.”

EDs/As WOULD LIKE TO SPEND MORE TIME ON



How ED/As would like to spend their time

The recent journal article “The Values That Set Us Apart: Guides for Managing the Temple’s Business,” describes the connection between the work and the Jewish values that motivate many ED/As:

We are directed to lead with the ethics and values set by Torah and by centuries of Jewish teaching. Whether we are dealing with financial challenges ..., our actions must reflect our foundational ethical and moral code. Our vision is to strengthen and ensure the continuation of our Jewish community. Our mission is to create

relationships and understandings that support our vision.³⁴

While synagogue leaders sound interested in the potential for a broad ED/A role, they worry that core operational tasks might not get enough attention. ED/As are also concerned about managing both aspects of their work and whether they would have the resources and the necessary authority to be successful. They also worry about whether their presidents and rabbis would actively support this enhanced role.

A synagogue president articulated the dilemma many congregations face about the limits of the current ED/A role, and how much more effective an ED/A could be:

The position of executive director is a new one in our recently consolidated congregation, and her roles and responsibilities have not been so clearly defined yet. To a large degree, she has been expected to function more as an office manager but sees herself as underutilized, so far, regarding taking a more vital role or in developing programs, strategic planning, and influencing decision making in a culture that has been very heavily reliant on the voluntary services and relative autonomy of congregations. ... The fact is that the office “needs work” regarding efficiency, and working on improving the office processes is crucial, but should not limit the wider role of an executive director.

Time pressures are worse, perhaps, because the majority of ED/As spend at least a third of their day on unplanned activities. Some of this work, such as unexpected facilities issues, just adds to the ED/As feeling overwhelmed. On the other hand, when they are called to assist a member in a life cycle crisis or engage in a meaningful conversation with a congregation or staff person, it can be fulfilling.³⁵ As one executive director of an urban reform congregation described, emphasizing the importance of this aspect of her work, “I think I spend more than a third of my time on unplanned activities, because people walk in and the conversation that’s not planned takes an hour of time, because it just does. ... My door is always open.”

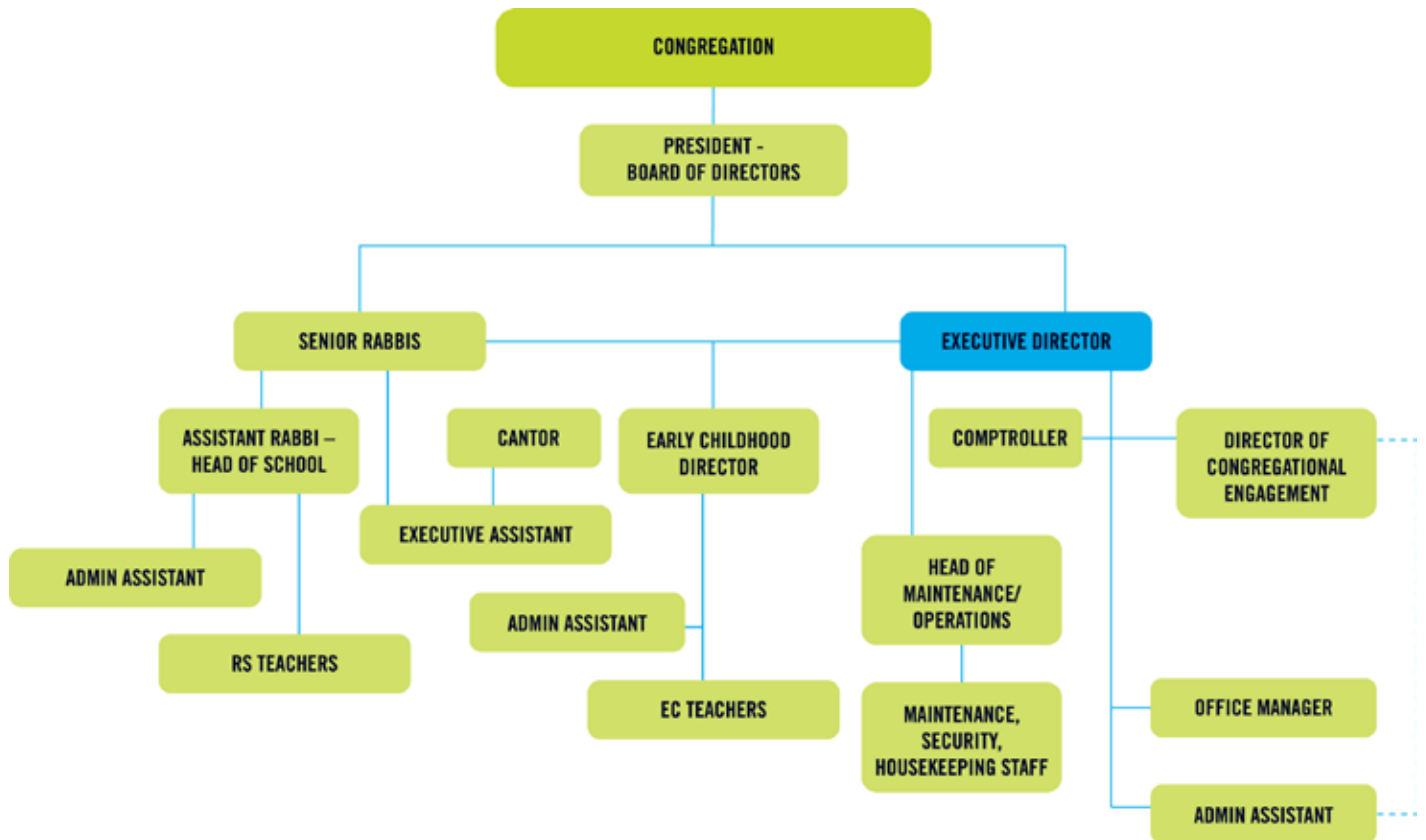
³³ In one Reform suburban congregation, the rabbi explained that he “and president are rethinking role, [want to] hire a part-time financial role and have an executive director focus on membership engagement and communications. Finance person will coordinate with and report to the executive director.”

³⁴ Herst, Esther, “The Values that set us Apart: Guides for Managing the Temple’s Business,” NATA Journal (Fall 2017)

³⁵ Our survey results indicate that unplanned time increases with a congregation size up until the largest congregations, where they may benefit from additional staff resources. In addition, women in general have more unplanned time than men.

The organizational chart below represents an expansive ED/A role. It is from a suburban congregation with a relatively new executive director who reports to both the president and the senior rabbis. Some program staff members report to the ED/A, and others to the senior rabbis. Actively involved in membership engagement, the ED/A is also responsible for development and

fundraising. For congregations with this level of “executive director,” expansive job descriptions shift core functions from technical tasks to management, leadership, and strategic-thinking skills. Technical competencies and interpersonal skills are different from the above “administrator” role.



Organizational Chart of a Synagogue with an “Executive Director”

Job descriptions vary, reflecting both operational and strategic functions.

Perhaps because of confusion over the appropriate scope of the ED/A role, the list of functional responsibilities included in many job descriptions are endless, reading like grocery lists.³⁶ They reflect a

hope that somehow ED/As will be able to juggle many responsibilities, have the requisite skills, and move from operations to strategic thinking to membership engagement without missing a beat. Interviewers, however, generally acknowledged that core functions in these job descriptions are unrealistic and too much for any one person.

SYNAGOGUE ED/A PORTFOLIO



OPERATIONS

- Building maintenance
- Human resources
- Capital improvements
- Technology
- Communications/social media
- Fundraising
- Membership management
- Finances



PROGRAM

- Membership engagement
- Education
- Social justice
- Leadership development
- Staff development
- Strategic planning



SUPERVISION

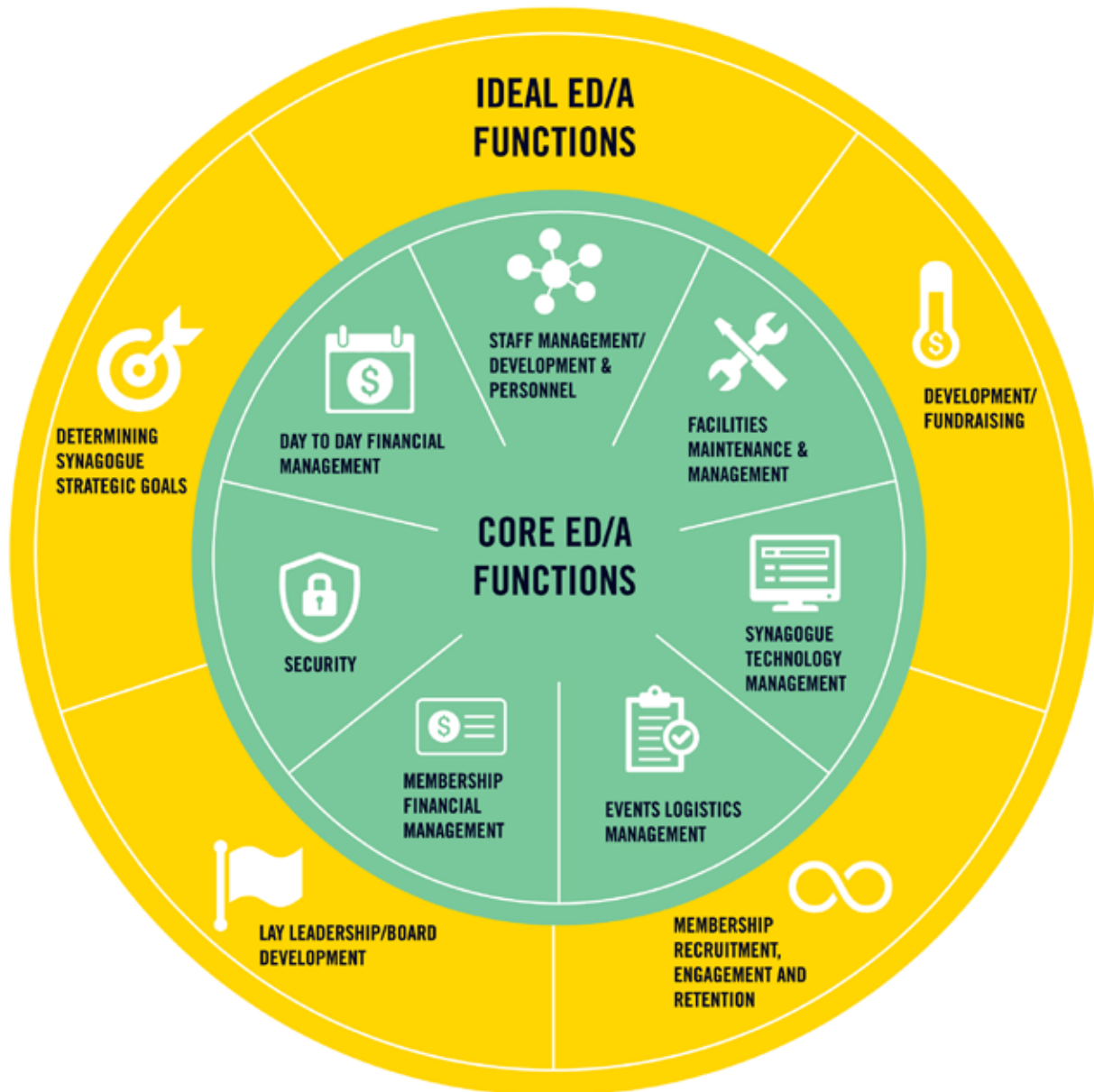
- Maintenance
- General administration
- Finance
- Events
- Communications
- Membership technology
- Fundraising
- Early childhood
- Other educators and program staff

ED/A portfolio: List of operational and programmatic priorities and supervision

³⁶ See Appendix for excerpts from related job descriptions.

The chart below summarizes core functional areas of responsibility that emerged from a review of job descriptions, interviews and survey results. It also reflects the supervisory – reporting relationships that are also part of the overall definition of the ED/A role.

The Appendix includes job descriptions that provide specific functional responsibilities.



This graphic is a useful guide for considering the scope of the ED/A role. The blue circle includes core operational functions of the ED/A's “administrator” role, and the yellow circle enhances the role with a layer of strategic, governance, and engagement responsibilities of the “executive director” role.

Relationships with other synagogue leaders. The skills and organizational structure necessary for functional priorities and expectations can result in tension or confusion between ED/As and the presidents, rabbis, and educators of the congregations they serve. This is especially true when ED/As seek to integrate daily operational tasks and broad engagement in the life of the congregation, while colleagues may want them to focus only on operational tasks. Without transparency and clarity, the differing views of the role can lead to job dissatisfaction, confused priorities, and misunderstandings over authority. Positive synagogue leadership relationships, therefore, are crucial.

An ED/A's ability to work well with many different personalities, become effective team members and builders, and lead from behind may be as important as technical skills. These emotional quotient (EQ) skills help them to build relationships with synagogue leaders and may determine what ED/As can achieve in their role. The research findings emphasized general patterns around relationships, as well as potential challenges with the president, rabbi, and educator.³⁷

An emerging theme from the interviews is the role of the ED/A as facilitators, providing lay and staff leadership with practical operational information, building consensus, and framing issues around strategy and a vision for the future. Synagogue professionals identified the interpersonal skills and qualities needed to effectively maneuver through potentially fraught situations as important competencies of their ED/As. As the president of a suburban Reform congregation stated, he wanted an "executive director who ... provides strategic initiatives and direction, ... and mediates issues with the senior professional staff."

Another theme was the extent to which successful ED/As must adapt and adjust to situational and leadership changes. As our research indicates, ED/As recognize they must be willing to modify how they do things and reframe their role, style, and methods, depending on the issue addressed and synagogue team dynamics. As a rabbi of a suburban reform congregation noted, the "job description of ED varies from place to place, and some of it depends on the strengths the

person offers. I've seen at least three different EDs, each very different from one another and different in the places that they're at."

Adaptability connects to another finding related to the impact personalities have on defining roles and establishing protocols for making decisions. Synagogue leaders shared many stories that illustrate how easily a difficult personality can disrupt the leadership team.

Specific relationships between ED/As and the senior rabbi and president are especially important. Both relationships are heavily influenced by the nature of the relationship between the senior rabbi and president. Our research indicates that many rabbis and presidents clash on how they share authority and power, including who heads the synagogue makes decisions, and sets the strategic vision. The conflict or confusion over role boundaries could also affect their understanding of the role of the ED/A and who should supervise that role.³⁸ According to some synagogue leaders, presidential transitions are often a time when these questions arise.

Most presidents describe the ED/A as their "resource person" and sometimes as their "partner" on the operations and management side of the synagogue's work. A president of another suburban Orthodox Union congregation who viewed himself as the CEO said, for example, "In a perfect world, [the president] would very much like the executive director to play the chief operations officer role. Everything about running the shul should run through the COO." Rabbis, in contrast, often describe the ED/A relationship in terms of trust, as the person who implements their vision and the person responsible for handling program and events logistics. As a rabbi of a progressive, suburban congregation stated, "Rabbi is CEO ... executive director is the chief of staff, operations, and coordinator of day-to-day."

Longevity in a role may also affect the power dynamics among the presidents, rabbis, and ED/As. Several rabbis we interviewed told us about how powerless they felt in trying to remove a longtime executive director and bring in someone they could work with more effectively.

³⁷Nearly all ED/As in our research report their two most important relationships as those with presidents and senior rabbis. For many presidents, the most important relationships are with the senior rabbi, followed by the ED/A. For senior rabbis, it is typically the president and then the ED/A or the educator. For the educator, the senior rabbi is first and foremost, with the ED/A or their lay leader liaison in second place.

³⁸As the president of an urban OU congregation explained, "I'm sure that it's not clear [if the senior rabbi reports to the president]. Anything that is religious or spiritual, the president does not have the power to make that decision. It is a weird dynamic in that respect. ... It's pretty clear that the executive director reports to the president and is an employee."

A rabbi of a suburban conservative organization with a longtime administrator stated, “There is a general sense that all staff reports to me, unenforceable and unaccountable in any possible way. It took me two years to get rid of our religious school director, who was horrible. I am not going to even try to get rid of our administrator, because she owns me.”

Presidents and executive directors describe how long-term senior rabbis could become autocratic, with no one willing to challenge their decisions. As one president of an urban Orthodox congregation with a longtime senior rabbi and a relatively new ED/A stated, “Some of the structure of the relationships among the rabbi, president, and executive director changes. It depends on the strengths of the relative people in their place. ... The rabbi was the shul and the figurehead of the shul. Then the executive director and the president were just emissaries. I would like it to be more of a three-person team of equals, working as a team.”

ED/As describe themselves as needing to respond to both the president and the senior rabbi as they build strong, trusting relationships with both, even if there is conflict. They agree that when each works well with the other, they are better able to focus on their core functions and serve the congregations successfully because of the support of the other two.

Educator and ED/A relationships are also important, although with possible areas of conflict. Some congregations have developed rabbi/educator or cantor/educator roles that may have more authority as clergy than they would otherwise as educators. They may also have expectations of their ED/A based on clergy training, and they may not have the management and other skills that the ED/A generally expects from an educator. These joint positions may lead to reorganizing functional priorities for the executive director. For example, in one suburban congregation, the senior rabbi spoke about wanting “to hire a rabbi/educator who is visionary and a strong manager and educational leader.” In such a congregation, the ED/A role may be limited to operational responsibilities.

In some congregations, educators and ED/A roles overlap, especially regarding member engagement.³⁹ They may share this responsibility and supervise staff — for instance, program staff or early childhood educators — with clergy or lay leadership. Development is another area of overlap, because some educators are responsible for finding donor funding for their programs, and most fundraising efforts are managed through the ED/A. Synagogue leaders have not thought much about the extent to which some of the organizational changes could result in confusion about the authority and scope of responsibilities of these roles.

Some educators describe tension with their executive director because of a different professional approach to synagogue issues and confusion over reporting structures.⁴⁰ In voicing concerns over the executive director’s role in her congregation, an educator for a suburban reform congregation said, “Executive director is a hard life — sometimes hard to be kind and strong at the same time. ... It may be difficult to have a Jewish heart or soul in this role.” Few other educators go as far as this educator did, but others suggest they felt their opinion was not as valued as the ED/A’s, even when these opinions were on substantive areas in which they were more knowledgeable. An educator of an unaffiliated urban congregation discussed her difficult relationship with the congregation’s executive director, who “is just about moving things forward.”

The educator described her ideal executive director as someone:

- To talk with and to.
- Who understands the education point of view.
- Who provides money for programs.
- Who understands that education should be a high priority.
- Has strong communication and social media skills.
- Is more focused on administration.

³⁹ Some education degree programs directly attempt to train their students to be leaders and education experts. For example, the William Davidson Graduate School of Jewish Education at the Jewish Theological Seminary seeks to “train the leaders who will shape the lives and communities of the Jewish people for decades to come.” (See <http://www.jtsa.edu/davidson-graduate-school-of-jewish-education>.)

⁴⁰ Professional education association leaders from JEA, JEP, and ARJE spoke about this in blunt terms, noting that many members of their organizations complain about their ED/A relationship. As one Jewish education leader said, “EDs wear too many hats ... Job is too big. ... Key to success of ED–educator relationships is collaboration.” Another education leader spoke about educators learning to be “visionary managers” with “budget skills ... management” and knowing “how to work in an organizational structure. ... Collaboration is key.” A third education leader explained that “educators don’t understand the ED role. See it focused on finance, membership building. ... Many educators do not like their EDs, and they don’t think their EDs are effective.” It appears that these educational associations are not focusing on the educator relationship with ED/As. Rather, they are working on clergy–educator relationships.

At the same time, our research indicates that ED/As and educators collaborate on many issues that include the budget, events logistics, staff issues, and working effectively with lay and professional leaders and members. A number of educators praised their executive directors for their support.

In general, ED/As did not feel the same level of tension toward educators as educators (and echoed by educational leaders) expressed toward them — tension that surprised many of the NAASE and NATA leaders who participated in this study.

SYNAGOGUE MANAGEMENT: MANAGEMENT MODELS, REPORTING STRUCTURES, AND ED/A TITLES CONTRIBUTE TO A LACK OF CLARITY AROUND THE ED/A ROLE.

As synagogues grapple with changing times and roles, they do so in an environment where synagogue leaders are also confused about leadership roles and management processes. How are decisions made today — and how should they be made in the future? Many management models start with a basic assumption that staff and lay leadership work is sacred. Participants may generally agree on this as the ideal model for synagogue management. There appears to be confusion, however, is in how this ideal is translated into a synagogue's day-to-day functions. Three examples illustrate the issues raised by specific management models.⁴¹

Sacred Partnership/Covenantal Relationships Model. This model describes an ideal collaborative partnership among lay and professional synagogue leaders,⁴² emphasizing respect and appreciation for one another's gifts.⁴³ While movement leaders often refer to sacred or covenantal relationships, synagogue

leaders generally do not. This model, on its face, does not provide synagogue leaders with practical guidance on making decisions for the synagogue or on functional roles and responsibilities. Perhaps as a result, both the Conservative and Reform movements have developed tools for congregational leaders to apply this relationship model to synagogue management issues.⁴⁴

Three-Legged Stool Model. This model describes a hierarchical decision-making model of leadership and does not address interpersonal relationships. It defines the senior rabbi, president, and ED/A as the synagogue leadership and decision-making team. This model is referenced often by ED/As and their professional organizations (it was the focus of a NATA conference years ago).⁴⁵ While presidents and rabbis also referenced this model, when mentioned by educators, it was generally with a question about where they fall in this model or a suggestion that the three-legged stool included them and not the ED/A.

Corporate Model. While corporate terms and organizational structures are not generally part of synagogue management literature, synagogue leaders use them to describe the synagogue's leadership team, including the CEO role. Some congregational leaders find this model antithetical to what a synagogue represents. But for others, it provides a way to think about power and authority. In identifying who the CEO is, sometimes it's the president or the senior rabbi, and sometimes it is a blended leadership system, where the rabbi is CEO for program, spiritual, and community-focused matters — as the chief ritual officer, chief spiritual officer, or chief engagement officer⁴⁶ — and the president is CEO for business matters.⁴⁷ Synagogues that rely on this model generally presume that the ED/A is the chief operating officer.

⁴¹ Other examples include the Double Pyramid Model, which assumes two pyramids of organizational management headed by a chief volunteer officer (usually the president) and a chief professional officer, which could be the senior rabbi or the executive director. (See pages 41–45, Teutsch, David. *Making a Difference: A Guide to Jewish Leadership and Not-For Profit Management*. Wyncote, PA: RRC Press, 2009.) *Clay kodesh* is used in the Rabbinic Assembly code to describe a rabbi's relationship with his or her congregation. It refers to the idea that rabbis have a unique role in the congregation as spiritual and religious leaders because of the holy purpose of their work that includes rituals and life cycles. It's also appropriate to hold them to a higher standard. More recently, this term is used more broadly to describe those who work in synagogues. There is some suggestion that rabbis, as *clay kodesh*, should not focus on the business of managing the synagogue.

⁴² See Bellow, Marci, "How the Language of Sacred Partnerships Helps Build Trust," Union for Reform Judaism, February 27, 2017, <https://urj.org/blog/2017/02/27/how-language-sacred-partnership-helps-build-trust>.

⁴³ See *Sacred Partnership: A Resource and Discussion Guide*: URJ 2017, "A sacred partnership is a commitment to building and nurturing relationships that elevate the work of leadership to a level of holiness. Sacred partnerships recognize each of us as individuals and our desire to inspire sacred action in our communities. Sacred partnerships are built and nurtured through the Jewish values of mutual respect, trust, honesty, listening and communication, transparency, confidentiality, flexibility, and reflection." USCJ's Sulam Leadership program for current leaders also focuses on the covenantal model. Read a description of this model, including how it contrasts with the contract or corporate model, in Beaumont, Susan, and Gil Rendle, *When Moses Meets Aaron: Staffing and Supervision in Large Congregations*, New York: Rowman & Littlefield Publishers, 2007.

⁴⁴ See *Sacred Partnership: A Resource and Discussion Guide*, URJ 2017.

⁴⁵ See *NATA Journal: The Leadership Issue*, National Association for Temple Administration, Fall 2009, <http://natanet.org/wp-content/uploads/2014/05/NATAJournalFall2009.pdf>.

⁴⁶ Many United Synagogue materials describe these rabbinic roles. See, for example, USCJ's guideline for rabbinic search committees and their Sulam programming around volunteer/staff partnerships, <https://uscj.org/leadership>.

⁴⁷ More presidents, educators, and ED/As identify the president as the CEO than rabbis do. Rabbis are more likely to define themselves as CEOs.

CEO language came up in many conversations with synagogue leaders who struggled to describe how decisions are made in their congregation and whether one person has ultimate authority.⁴⁸ As one rabbi of a suburban conservative congregation stated, “I’m sort of a hybrid. ... I feel like I have the responsibility of a CEO without the authority that comes from being a CEO.” Some presidents expressed discomfort around the question of who supervises the senior rabbi and a disinclination to do so, even when they might otherwise think of their role as the CEO.

For example, one president of an urban orthodox congregation explained:

Forget about what you’re reading or hearing. I don’t think you should see a rabbi reporting to the president, which is interesting. That’s the whole thing about the performance review. ... It shocked me to think that the rabbi would report to me, as president.

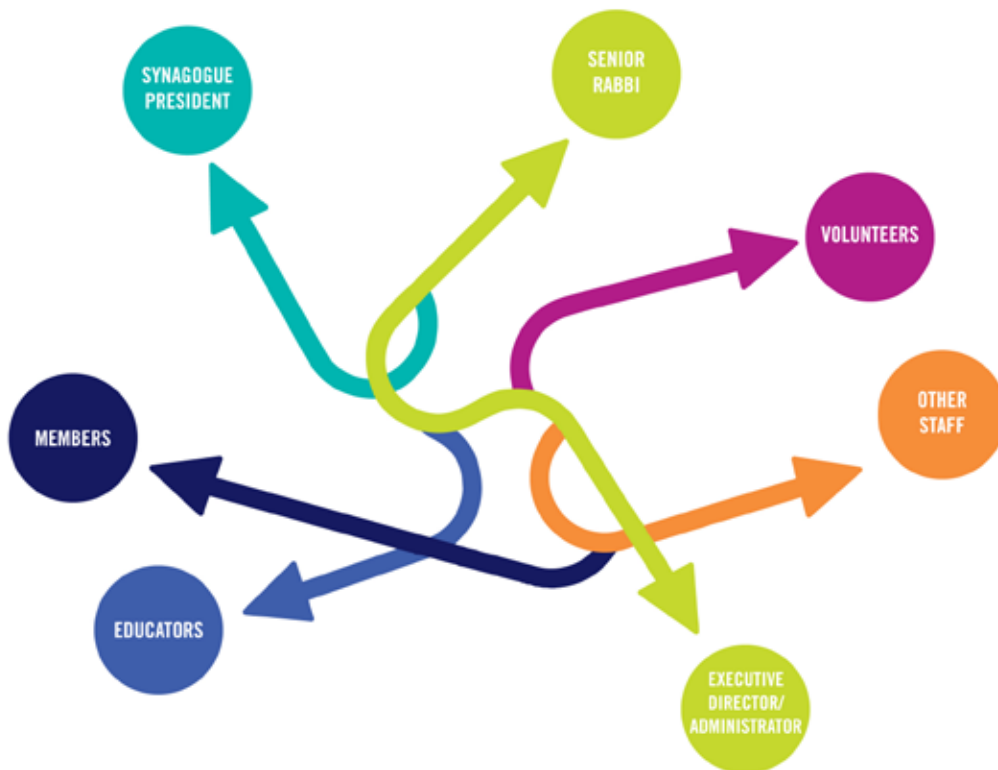
Regardless of management models, there is a universal call for better understanding the functional responsibilities of the president, rabbi, and ED/A and limits on the rabbi’s and president’s authority.

A movement leader echoed the desire for role and decision-making clarity:

The greatest confusion in synagogue life is when there is a lack of role clarity. Rabbi should drive the role definition for all senior team members. President’s job is to be the driving voice of governance but not to govern alone. ... There is a gray area of shared leadership. Presidents set goals and expected outcomes. Rabbis and presidents work together to figure out their roles of shared leadership. That is where the difficult communications take place.

As the president of a suburban Reform congregation with a longtime senior rabbi and new executive director said, “In the synagogue, who is in charge? There’s a triangulation. ... Decisions are being made in different places.”

IN THE SYNAGOGUE, WHO IS IN CHARGE?



ED/A titles do not provide clarity around the role’s functions

⁴⁸ A rabbi of a suburban conservative congregation went so far as to say, “We don’t have any of that horizontal, lateral, hierarchical. ... There is no CEO, no COO. ... Nobody’s accountable to anybody. It’s miraculous that we are open.”

Research shows that in most congregations, across movements, the senior administrative position is called “executive director,” regardless of the role’s function or authority. Of the individuals surveyed, 88% use the title executive director. A minority uses the title administrator, while a small number use chief operating officer (COO) (see chart below).⁴⁹ NAASE and NATA professional associations use “executive director” to refer to their members, regardless of official titles, functional roles, or organizational authority.⁵⁰

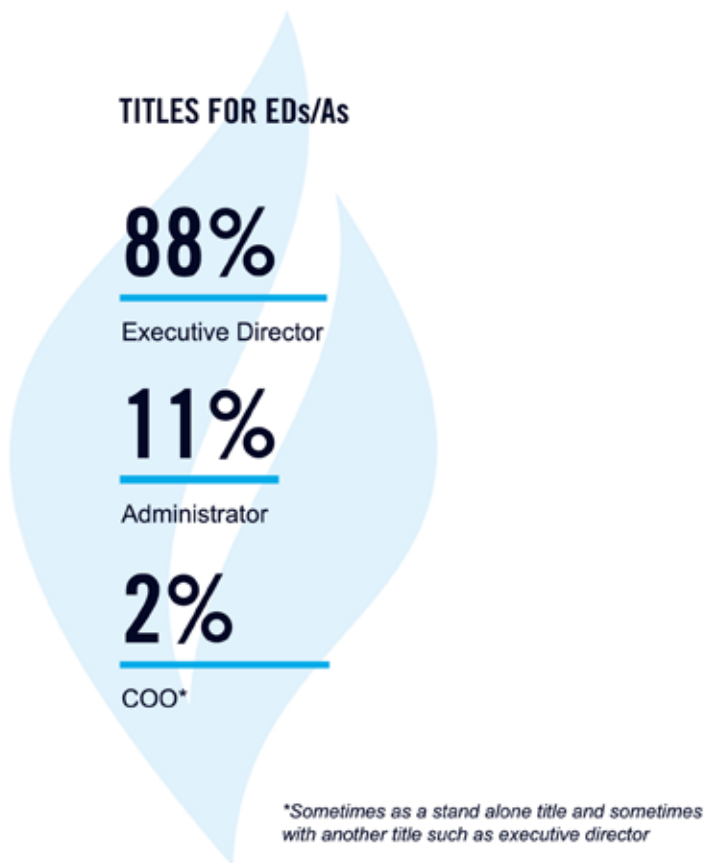
But what does this title mean? In a traditional nonprofit, “executive director” is typically the most senior professional in the organization. That is not the case for ED/As, many viewing the title as a sign of respect that acknowledges the important role they play. They believe that “administrator” reflects a lesser position. Interestingly, synagogue and movement leaders also draw a distinction between “executive director” and “administrator” roles, suggesting that “executive director” connotes a senior role with significant functional responsibilities and authority, while “administrator” suggests a more limited role. And yet synagogues use “administrator,” regardless of the individual’s functional role and level of authority.

Though its use is relatively new, “COO” is increasingly used as part of the job description. You’ll also see this use in the not-for-profit world generally and in churches.⁵¹ Increasing references to the COO role in job descriptions, even when it’s not in the formal title, appears to be about positioning the senior operations role as supporting the CEO or “heads” of the congregation — the senior rabbi or president.⁵² Its use is relatively rare in the synagogue world, even though we found that the ED/A position is often described using the COO term.

See the Appendix for an in-depth discussion of the COO title and others used in the church world for the senior administrative role.

Reporting Structures. Organizational charts and job descriptions do not necessarily reflect actual authority.

Regardless of title, the trend is for most ED/As to officially report to the president (see chart on next page), while a minority report to the senior rabbi. Our research indicates that presidents generally want this structure, while senior rabbis generally like



⁴⁹ While only a few OU congregations participated in this survey, a 2016 OU survey of executive directors found that two-thirds had the title executive director. In NATA’s 2017 salary survey, 77% of respondents had the title executive director, and 16% were “temple administrators.”

⁵⁰ NATA’s website describes its membership as including “executive directors with a variety of experiences and backgrounds.” Many executive directors have significant professional experiences outside of the synagogue, both in the for-profit and not-for-profit worlds. They may have also earned professional certification from NATA. The goal of any search process is to find the executive director best suited for the specific position. See NATA’s *Guide for Congregations Searching for A New Executive Director*, <http://natanet.org/for-congregations/nata-job-listings-guide/>. NAASE’s website similarly refers to executive directors and to “synagogue executives.”

⁵¹ In the church world, two senior administrative positions exist with different titles and different roles. The “church business administrator” focuses on daily operations and may have a bigger management and leadership role. The title is used most often in smaller congregations, where the church needs its professional to be a hands-on generalist, similar to the “administrator” role in synagogues. In larger churches, the “executive pastor” emerges as a translator of the senior minister’s mission and is often the chief of staff and second in command organizationally, with the ability to step in and preach or conduct life cycles as needed. For this reason, while similar to the “executive director” title in a synagogue, the executive pastor role has a stronger clergy component. See Taylor, Phil, *Defining the Executive Pastor Role*, Orlando, FL: Floodlight Press, 2015.

⁵² Mike Bonem discusses a similar supporting role of church administrators in *Thriving in the Second Chair: Ten Practices for Robust Ministry (When You’re Not In Charge)*, Nashville, TN: Abington Press, 2016.

the role to report to them. As a result, many ED/As, presidents, and rabbis end up with a complex supervisory relationship and often a bifurcated reporting structure. In some congregations, organizational charts include dotted-line or dual reporting, where the ED/A officially reports to both the president and the senior rabbi (see chart below). In other congregations, ED/As respond to and are accountable to both as a practical matter. (See, for example, the two reporting structures demonstrated in organizational charts on pages 16 and 18.

ED/A job descriptions often include language about joint supervision. Our research suggests that priorities differ if the ED/A reports to the president or the senior rabbi. In survey responses and interviews, presidents who supervise ED/As are more likely to want the ED/A to

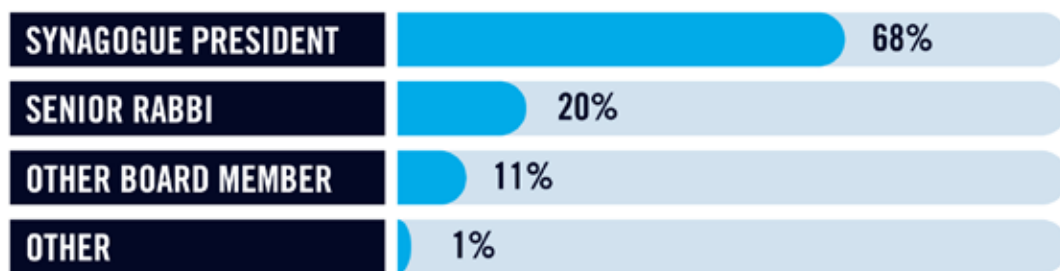
lead staff management, help with board agendas, and develop lay leadership. Rabbis, however, are more likely to want them to focus on membership recruitment, life cycle management, and everyday operations.

The two job descriptions below illustrate the split supervision many ED/As face:

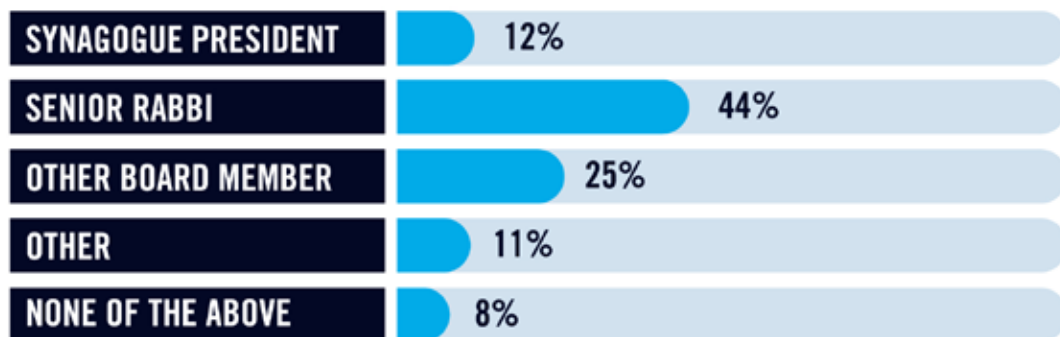
This position reports to the rabbi for staff, programming, development, and management issues. The executive director will report to the board on financial matters.⁵³

Reporting directly to the CEO/senior rabbi with a dotted line to the president ..., the ED will provide the business knowledge and leadership to make the strategic plan a reality.⁵⁴

EDs/As DIRECTLY REPORT TO



EDs/As DOTTED LINE REPORT TO



Who ED/As report to

⁵³ Job description from an independent, entrepreneurial urban congregation.

⁵⁴ Job description of an ED who had been an longtime active board member.

ED/As have a wide range of reporting and supervisory responsibilities. Survey respondents and interviewers generally agree that the ED/A should be responsible for supervising basic administrative, finance, and maintenance staff, who generally report to them as well.⁵⁵ In many congregations, a diverse group of operational and programmatic staff report to ED/As, including directors of development, communications, technology, facilities, youth and early childhood centers, and membership engagement. In a few congregations, ED/As supervise all educators, and in another few, they have a dotted-line supervisory role with clergy.

Congregations need to decide on the best reporting structure for their synagogues, given their priorities, governance model, and staffing.⁵⁶ Our research suggests that too many synagogue leaders fail to ensure that organizational charts and reporting structures clarify the leadership, governance, and authority of key synagogue roles, including the ED/A. Even if structures are transparent and clear, leaders may need to further define and refine roles by working relationships within the synagogue team. A president of an urban Reform congregation in which the executive director reports to the president explains, “What is the right structure? Less about the structure that drives the relationship and more about building relationships with trust and communication, so that where there is tension, it can be worked through.”

PROFESSIONAL DEVELOPMENT, TRAINING, AND MENTORING IS NECESSARY TO THE SUCCESS OF THE ED/A.

Even if the ED/A role is clear, regardless of functional responsibilities and authority, changing times require ED/As to meet changing times and changing needs. Ongoing professional development becomes even more important, with so many coming to the role without training in all functional areas synagogues expect them to be responsible for — now or in the future.

Synagogue leaders recognize the value of ongoing training and support for ED/As, even if it isn't always clear to them the specific professional development needed.⁵⁷ Many ED/As reflect back often on their training and valuable lessons, and most are interested in continuing their professional development.

An executive director who went to school at night to get his MBA said his schooling is “invaluable”:

Not a Jewish nonprofit management course, but ... the skills are so, so, so invaluable to me. I'm amazed by how many EDs have bookkeepers and accountants because they can't answer basic financial questions. ... This job would be much more difficult, and I would be much worse without an MBA.

Online and in-person courses in marketing, fundraising, member retention, data management, synagogue trends, and communications ... all valuable. I'd love time to do more of it.⁵⁸

The critical importance of ongoing professional development for ED/As is reflected in the efforts of professional organizations to provide ongoing training and mentoring programs. The majority of NATA and NAASE members take advantage of opportunities that include certification programs, annual conferences, webinars, weeklong learning sessions, and peer mentoring. Many Reconstructionist ED/As are members of at least one of these organizations and take advantage of training opportunities, and the Orthodox Union offers an annual conference for their ED/As. The movements also provide opportunities for ED/As and other synagogue leaders to hone their management and technical skills.

As one NATA member reflected, “My training included fundamentals of synagogue management and the NATA institute. Without those, my job would have been much more difficult. The tools learned at these trainings allowed me to do my job better.”

⁵⁵ We question whether administrative staff that support clergy or educational or program staff should report to the ED/A or the clergy or program person for whom they work regularly. A number of organizational charts shared in our research indicate dotted lines and crossover reporting or supervising relationships that attempt to respond to this question.

⁵⁶ There does not appear to be an ideal organizational chart. Some movement organization materials include sample organizational chart models and generally do not proscribe any one ideal or model organizational chart.

⁵⁷ Survey results show that 68% of all presidents, 73% of all rabbis, and 66% of all educators are extremely or very interested in their ED/As getting ongoing training. Only 10% or less are not very or not at all interested. For executive directors, 69% are extremely or very interested, while only 5% are not very or not at all interested.

⁵⁸ This executive director also noted the helpfulness of interaction with others in the field and one-on-one training with board members about staff management and development .

Organizational leaders at NATA and NAASE say they're rethinking their educational focus to teach important technical skills ("administrator" areas) and support their members looking to study strategic, leadership, engagement, and other EQ skills ("executive director" areas). Both organizations generally believe that members are most successful when their role integrates administrator and executive director core functions.

Many other Jewish and secular institutions provide training and professional development opportunities for ED/As:

- UJA-Federation of New York's Weiner Center for Leadership and Learning offers the Institute for Jewish Executive Leadership for executive directors from various Jewish organizations, and some participants are synagogue executives.⁵⁹ One participant who is a synagogue executive director at a suburban conservative congregation noted, "A beneficial aspect of the program was being in the mix with non-synagogue directors. So often, it is about what other synagogues are doing. It's helpful to learn from other organizations. It exposes new ideas and approaches."
- The Hebrew Union College-Jewish Institute of Religion's Zelikow School of Jewish Nonprofit Management offers a certificate and master's degree programs in nonprofit management, based in Los Angeles. While the Zelikow School is not specifically for synagogue ED/As, the programs include materials relevant to the role.⁶⁰
- Many academic and professional programs offer professional training programs, including Baruch College in New York City,⁶¹ Spertus Institute for Jewish Learning and Leadership in Chicago,⁶² and the Church Network in Texas.⁶³

Technical training programs in the marketplace allow anyone to become more proficient in social media, financial reporting, and other specific core skills, and such synagogue vendors as Membership Management Software run special programs for synagogues.

A number of synagogue experts are private coaches who offer personalized training to ED/As. The majority focus on interpersonal and EQ, problem-solving, and building-management skills.

But, according to our study, many ED/As do not take full advantage of training opportunities due to a lack of time or money. Many training programs are expensive and don't easily fit into the difficult schedules of many ED/As.

As one executive director said:

The busy nature of the job and the lack of resources makes adequate training and professional development a challenge. I've thought about sabbatical arrangements for administrative management, but that is often a pipe dream. Still, I've taken classes through NATA, online seminars through AFP and other professional organizations, have employed leadership trainers and strategic planners on behalf of the synagogue, etc.

ED/As fail to take advantage of training because it doesn't necessarily meet the needs of the evolving role:

- Secular skills training doesn't account for the nuances of synagogue dynamics.
- Short-term opportunities may not provide enough substantive and focused learning based on the functional needs of synagogues.
- Training may not focus enough on new priorities and necessary skills.
- Current training is taking place in an environment where the ED/A role is confusing.

⁵⁹ For more about this program and others, see UJA-Federation's Weiner Center Institute for Jewish Executive Leadership at <https://www.ujafedny.org/get-info-for-professionals>.

⁶⁰ For more about the Zelikow School of Nonprofit Management, see <http://zsjnm.huc.edu>.

⁶¹ See the Executive Master of Public Administration program at Baruch College's Austin W. Marxe School of Public and International Affairs, <http://www.baruch.cuny.edu/mspia> and special certification programs at www.baruch.cuny.edu/mspia/academics/executive-certificate-programs/index.html.

⁶² See the executive training program at Spertus Institute for Jewish Learning and Leadership at <https://www.spertus.edu>.

⁶³ See the Church Network's training opportunities at <https://thecrg.org/resources/national-association-of-church-business-administration-nacba>.

AREAS FOR CONSIDERATION

Our final report section moves from research to potential next steps to address issues raised by the results and maximize the ED/A's effectiveness. By developing transparent roles that integrate functional responsibilities, authority, and skills, the ED/A can better serve the specific needs of each congregation, better face continuing challenges and opportunities, and better serve the Jewish people.

Our research pushes synagogue leaders to identify core priorities, revisit assumptions about roles and responsibilities, and understand how to strengthen relationships.

The question is how to encourage opportunities for synagogue, professional, and movement leaders to develop effective transparent governance, management models, and tools for future leaders. Significant possibilities exist for greater teamwork across all sectors to support ED/As and develop key roles, responsibilities, and governance structures.

To start, synagogues can create a more effective and flexible ED/A role by addressing the elements below and referencing supporting materials in the Appendix.

Establish realistic and transparent parameters for the ED/A role. Include common language to address core functions, and consider minimum hard and soft skills that all ED/As should have.

Questions to consider:

- What are the key organizational priorities for the synagogue — both operational and more programmatic or strategic? Given the culture of the synagogue and its priorities, how do the ED/A and other roles fit into the overall leadership, programmatic, and operational structure?

To maximize the ED/A's effectiveness, synagogue leaders must decide on titles, reporting and supervisory responsibilities, job descriptions, and relationships to other staff and lay leadership within the broader synagogue organizational system.

- Does the administrator or executive director support those priorities by focusing on operations or by having a broader portfolio? Synagogues must address how to best position the ED/A role to respond to new priorities and approaches, not just today's needs.

To meet agreed-on priorities, leadership must identify the most important and relevant technical, interpersonal skills, and functional areas. The synagogue can use these priorities to measure the ED/A's success.

- What resources are available to the ED/A to meet the synagogue's expectations and priorities, and how will the synagogue support the ED/A internally and through professional development and mentoring support?
- How will synagogue leadership make sure that roles and responsibilities are transparent to avoid confusion?

Synagogues must periodically review operational areas, programmatic areas, decision-making processes, and reporting structures for key professional staff and lay leadership as the congregation evolves.

- Based on desired goals and circumstances, can the synagogue find common language to address the core functions of the ED/A role and create templates to frame the role and address core competencies and necessary skills? How might professional associations and movement organizations support this effort?
- At the same time, considering patterns of core functions and skills that congregations require, should every ED/A possess specific hard and soft skills, especially around operational functions?

To stimulate conversation, the Appendix includes a set of SYNERGY cards that synagogue leaders can use to explore key areas of responsibility for the ED/A and focus group excerpts to discuss with the synagogue team or groups within it. Useful reference points throughout the report include the ED/A portfolio and graphics on pages 19 and 20 and organizational charts on pages 16 and 18.

Consider mentoring, professional development, and training for the ED/As. This support can help ED/As develop minimum skills and respond to changing responsibilities.

Should the synagogue require a formal certification program for all ED/As? How can it make sure to provide training opportunities for other synagogue leaders to maximize their work with ED/As?

To set the role up for success, synagogues can help ED/As:

- Ensure they have the necessary soft and hard skills to meet responsibilities based on core ED/A functions. Can professional associations and movement organizations provide this training through a common certification program?
- Develop as professionals, moving beyond operational functions to use their skills and become facilitators for evaluating their congregations. ED/As need continued training and mentoring around changing competencies to succeed as the role evolves.
- Understand their interpersonal or EQ skills, harness their strengths, and recognize the impact of their weaknesses for effective leadership and relationships.
- Take advantage of tools for managing complex systems, even if there's continued confusion over roles, responsibilities, and authority.
- Access ongoing mentoring and support. ED/As spoke about the importance of mentoring by peers and senior colleagues as well as building relationships with other synagogue ED/As and nonprofit leaders. How can the synagogue build this mentoring and support into professional development programming?

Synagogues must also pay attention to creating accessible learning opportunities that address:

- **Time and budget.** Diverse opportunities should be affordable and respect the time constraints many ED/As face. How can synagogues assure ED/As that they'll get the time needed to learn what is necessary to meet the role's crucial functional areas?
- **Use of technology.** How can professional development and training make use of technology so that learning is accessible and provides quality education across the country efficiently?
- **Different learning methods.** How can a synagogue design professional development to include different learning styles, giving ED/As the best chance to succeed?

See the Bibliography for a summary of websites and organizations that provide professional development and training.

Explore creative approaches for underfunded or less resourced congregations. Creativity can help congregations leverage in-house support and respond to the fact that many ED/As do not possess necessary technical skills or resources.

Congregations with limited resources may have additional barriers to creating a fully functioning synagogue with both efficient operations management and opportunities to be strategic. These congregations can find it difficult to align top priorities with the ideal ED/A role.

A few creative and entrepreneurial approaches for these congregations to try:

- Increase the use of volunteers to fill gaps or re-engage members as volunteers.
- Use vendors to "staff" such areas as security, building maintenance, events logistics, financial reporting, technology, communications, and human resources.⁶⁴

⁶⁴ URJ and USCJ have programs to help congregations connect to third-party vendors. Generally, this includes negotiated discounts on the fees charged by the vendors. We did not thoroughly investigate these programs.

According to a few ED/As we interviewed, third-party vendor relationships resulted in higher-quality services, technically proficient people to respond to specialized needs, and less time wasted managing an area in which they do not have technical expertise. A question deserving further consideration is whether there's a way to create third-party vendor options that can provide relief economically.

- Create operations collaborations across synagogues.

Some collaborations result organically from congregations sharing space, jointly hosting a program, or running ongoing initiatives — for example, high school or youth groups, food pantries, or adult programming. A few congregations have banded together to explore new data management systems.

The research for this report did not uncover collaboration resulting from shared operations staff or functions, except when congregations merged. Is it possible to imagine a consortium of congregations sharing staff resources to better support each party?⁶⁵ What will it take to get congregations to share operational areas with another congregation — for instance, a staff position, consultant, or vendor who gains knowledge by working with several congregations?

- Establish and stick with priorities that can be handled with available resources. This can be hard to imagine, because congregations are driven to exploring, changing, and responding to congregant needs.

Broaden relationships to include ED/As and other key synagogue staff and lay leadership.

Interviews with movement leaders suggest that most management training is about relationships between clergy and lay leaders, educators and clergy, or rabbis

and cantors.⁶⁶ Broadening synagogue relationships to include ED/As and other synagogue leaders could help address areas of potential conflict in congregations and get buy-in from key synagogue stakeholders about how to strengthen these relationships. Questions raised by this report are a part of NATA's and NAASE's long-term strategies for supporting their members.

What might happen if synagogue leaders were trained to approach synagogue management and leadership? It is possible to develop processes to support them in fulfilling core functions for each synagogue role? What if movement seminaries, organizations, and professional groups included questions about these relationships as part of their leadership training materials and management curriculum?

Movements are making an effort to do so. For example, the Reform movement's *Sacred Partnership* guide provides congregations with a model for asking questions around decision-making and considering how to move forward and even challenge one another respectfully.⁶⁷

Create a career path for Jewish professionals who may become ED/As.

Specific training can prepare aspiring ED/As by focusing on competencies necessary to respond to basic functional needs of congregations. How can congregations identify possible candidates for this role and support them with professional development opportunities that ensure they have necessary basic skills?

Without a direct path or formal certificate to becoming an ED/A, is there a way to take advantage of candidates' backgrounds, leveraging their experiences in a training program? Could there be a mentoring program for not only current ED/As, but also those who aspire to become one?

⁶⁵ In one city that comprises major donors who support the large Conservative and Reform congregations, donors hope to create a nonprofit organization that can handle member billing and vendor payments for both congregations. At this time, donors are paying for the two congregations to use a third-party vendor to update the congregations' computers, including moving to compatible new membership data management software and financial reporting platform.

⁶⁶ See URJ's Scheidt Seminar for presidents and president elects, urj.org/leadership-institute; USCJ's Sulam for Presidents and Sulam for Officers, <https://uscj.org/leadership/sulam-for-presidents>. There is some cross-staff programming as well, mostly driven by a program goal, such as strategic planning or an educational initiative that can involve lay leaders and staff. In addition, professional associations are creating opportunities to build staff relationships, like the JEP Leadership Initiative program that engages senior clergy and educators (see <https://jewishedproject.org>).

⁶⁷ *Sacred Partnership: A Resource and Discussion Guide*, URJ (2017)

CONCLUSION

The synagogue ED/A comes to the role with experience and a deep commitment to the Jewish community. Most love what they do but are often overwhelmed by the amount of work, competing demands, and complicated relationships as a result of confusion over their functional roles and authority. Technology, facilities management, and general operational tasks take up a lot of their time. They are aware that other synagogue leaders look to them to ease administrative burdens. At the same time, ED/As believe they can most help their congregations thrive by taking on a role that integrates operational and strategic functions. Furthermore, regardless of the scope of their role, ED/As want and need ongoing professional development opportunities to stay current and prepare for the future.

Our report details the external and internal challenges that prevent ED/As from best serving their congregations successfully.

First, synagogues deal with enormous pressures that include demographic changes, economic resource issues, aging buildings and other infrastructure problems, a lack of volunteers, shifts from program to engagement, and the constant need to respond to changing technology. As synagogues rethink roles and responsibilities to meet these challenges, ED/As fill in gaps and learn new skills to keep up with basic operational needs and redefine priorities to respond to the significant external pressures that are reshaping synagogue life.

ED/As must be flexible and adapt as synagogues change and priorities shift. As our research reveals, congregations are moving from program to engagement, incorporating more technology into operations, and exploring new funding models and creative cost savings.

Presidents and rabbis in particular must be aware of how their priorities translate into a functional definition of the position they need and the skills individuals should have. In today's world, congregations should consider these questions annually and also at key staff/lay leader transition points to maximize the ED/A role's effectiveness.

Second, confusion over the ED/A role creates obstacles for both individuals in the role and the rest of the synagogue leadership. Issues explored in the report include the scope of core functional responsibilities that best serve the congregation, reporting and supervisory structures that support those functions, and titles to best describe the role. Rethinking the ED/A role

requires a willingness to reconsider the functional roles and authority of synagogue leaders with whom the role interacts and to address the impact that changing roles may have on relationships. The confusion some presidents and senior rabbis have around their authority also affects the ED/A role, and there might be tension with the educator who is asked to take on a larger engagement role and thus have functional overlap with the ED/A.

Third, there is a need for movements, professional associations, and synagogue leaders to develop an effective, ideally common approach to support congregations in finding the most effective ED/A role for them and develop job descriptions, organizational charts and reporting structures, and titles that make sense. This effort requires clear core functions of the role and the ability to measure success. The ED/A and team members need to be able to understand the ED/A's priorities, skills, and necessary resources as well as complementary responsibilities of the other team members.

Finally, professional development is key for current and potential ED/As. ED/As need substantial training and mentoring geared toward core functions in ways that are accessible, even with limited time. At the same time, the evolution of synagogues and rapid technological changes require ongoing re-education and skills training. A set of core functions with core competencies could emerge for all ED/As, and training for these competencies should be available to potential ED/As.

Congregations can take steps to unify an understanding of the evolving role, develop job descriptions that accurately reflect core functions and competencies, and provide professional training and support for individuals in this role. Working together, synagogue and movement leaders can create stronger, more effective congregations by better using the ED/A in their congregations.



**I REALLY DO LOVE
THE WORK. BUT
I THINK THE BIGGEST
CHALLENGE IS THE
LACK OF CLARITY
AROUND THE
POSITION.**



**— Executive Director
National Professional
Association Leader**

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**WHAT MOTIVATES
ME IN THIS WORK
IS THE FEELING
THAT I CAN BRING
SOMETHING GOOD
TO THE FIELD, AND
BY EXTENSION TO
THE COMMUNITY.**



**— Executive Director
Suburban Reform Congregation**

APPENDIX

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SYNAGOGUE JOB DESCRIPTIONS

We include examples of actual job descriptions that we gathered in our research in this section. These descriptions represent what the congregation's leadership thought the role and responsibilities were for their ED/A at that time. As you will see, even when descriptions use the title executive director, the positions describe different core functions and required competencies.

As you review these documents against language from job descriptions for administrator or executive director positions, remember that each of these positions require considering the roles and responsibilities of other synagogue positions as well.

JOB DESCRIPTION LANGUAGE

Below are examples of language commonly found in job descriptions for executive directors and administrators, regardless of title, including core functions and core competencies.

Executive Director: Job descriptions often include sweeping language about the role and its partnership relationships with the senior rabbi and president.

Core functions relate to management, strategic implementation, staff and lay partnerships, and membership engagement. Many job descriptions refer to the executive director as the COO.

Specific terms include:

- Serve with rabbi(s) as part of [synagogue's] senior management team.
- Guide the process of [synagogue's] strategic implementation ... and ensure each person ... understands how their positions support ... the mission.
- Senior nonclergy employee and lead "implementer in chief" of the vision and mission of the congregation.
- Functions as the point of intersection of operations with educational and spiritual programming and messaging.
- Exceptional donor relationship management, negotiation, follow-through, and diplomacy skills.

Core competencies tied into the above functions include:

- Ability to be strategic while working at the ground level.
- Customer service-minded "doer" with a high EQ.
- Experienced leader.
- Effective team leader who can collaborate and delegate.
- Able to help others set, pursue, and meet priorities.
- Can translate nascent ideas and objects into actionable projects.
- Excellent problem solver.
- Skillful communicator.
- Available, accessible, and approachable to the synagogue community.
- Provides business leadership.
- Confident, flexible, and well-grounded professional.
- Self-starter who can thrive in an entrepreneurial environment.

Administrator: Job description (which may use another title) tends to focus on daily responsibilities and defined tasks. Often implied is that the administrator will be responsible for doing the tasks, and not making sure the tasks are complete.

Core functions may focus on specific ways in which the administrator will support clergy, educational staff, and lay leadership — logistics, administrative tasks, providing information, getting out communications, etc. Often, it is clear this role is the resource support to lay leadership as well.

Excerpts from administrator job descriptions include:

- Interfacing with prospective members about congregation and with existing members about dues, life cycle events, and other issues.
- Responsibility for the administrative implementation of the programs, policies, and strategy envisioned by the professional and lay leadership of the congregation.
- Responsibility for maintaining synagogue property and preparation of events.
- Responsibility for developing annual operating and capital budgets with the treasurer.
- Serving as a resource to the board by providing report and information as required.
- Collaborating with professional, clergy, and education staff.
- Supervising office staff, custodians, and bookkeeper.
- Facilitates and provides necessary information and support.

Core competencies, mostly focused on specific skills and knowledge, may include:

- Ability to manage administrative, custodial, and security staff.
- Experience with facilities maintenance.
- Familiarity with synagogue operations.
- Experience managing events.
- Experience with social media, communications, and data management software.
- Experience with membership organizations.
- Strong office computer skills.
- Ability to multitask.
- Ability to work collaboratively with clergy and lay leadership.
- Experience in financial matters, including budgeting.
- Strong interpersonal skills and ability to deal with a broad range of people with sensitivity, respect, compassion, and confidentiality.
- Honesty and integrity.

II. Administrative Director (full time)

- 1) Executive assistant to Rabbi (projects, communication, organization, etc.)
- 2) Develop efficient office systems & processes
- 3) Bookkeeping (reports directly to VP Finance)
 - a. Internal membership accounting
 - b. Payables/receivables
 - c. Reconciliations
 - d. Financial reports
- 4) Ritual
 - a. Supervision/mentoring/preparation of Gabbaim
 - b. Holiday preparation and orders (lulav, matza, groggers, flags, etc.)
 - c. Development of new baalei Tefilla (adult and youth)
 - d. High Holiday seating, honors & appeals
- 5) Synagogue communications & publications
 - a. email blasts
 - B. Shabbat Updates
 - c. Holiday Laws & Customs
 - d. Trip Ticks
 - e. Surveys
 - f. Website
- 6) Management & supervision
 - a. supervise receptionist
 - b. supervise Programming (Youth & Adult) Staff & volunteers
 - c. supervise facility 'readiness'
 - d. day-to-day business decisions
 - e. schedules & calendars (services, Shabbat/holiday times, events)

JOB DESCRIPTION – Executive Director, Brooklyn Heights Synagogue

Title: Executive Director

Function: The Executive Director serves as the chief administrative officer of the congregation in accordance with the principles, guidelines and objectives set forth by the Board of Trustees and By-Laws of the Synagogue. The Executive Director is responsible for the implementation of the policies of the Board of Trustees. She provides the day-to-day management of Synagogue fiscal and administrative affairs and has direct supervisory jurisdiction over all administrative, clerical, and building maintenance personnel.

Relationships: The Executive Director takes direction from and is accountable to the President of the Congregation and the Board of Trustees. The Executive Director also takes direction from the Rabbi in accordance with the provisions of Guidelines for Rabbinical-Congregational Relationships, (UAHC-CCAR, 1984), or its successor publication. The Executive Director is expected to collaborate and coordinate with the Rabbi, Educator and Preschool Director on administrative matters.

Principal Duties: Under the general direction of the President of the Congregation and in close consultation with the Rabbi, Assistant Rabbi and/or the Educator and/or the Preschool Director, as well as other Officers and Chairs of the appropriate committees, the Executive Director is responsible for assuring the performance of the following functions either personally or through his/her staff:

1. Office Management:

- Supervise all non-professional staff (with the exception of the content of the Rabbi's secretarial work.)
- Assist in hiring and firing all nonprofessional staff.
- Develop job descriptions, document and evaluate performance, and manage salary administration of all non-professional staff.
- Develop and implement office policies and procedures.
- Train new staff and oversee the continued training of existing staff.
- Supervise all office systems.
- Supervise the day-to-day operations of the Synagogue Office.

2. Religious Services:

- Provide administrative and logistic support required for the smooth running of all Shabbat and life cycle services, High Holy Day services, and festivals.

3. Property and Equipment:

- Maintain the property in good condition by authorizing necessary repairs, replacements and maintenance and making recommendations to the Board when extraordinary expenditures are required.
- Supervise the custodial staff to be sure that the property is kept in a state of cleanliness and repair, and custodial help is available when needed.
- Provide on-site supervision of repair, grounds maintenance, renovation and expansion projects.
- Negotiate, with the Treasurer's approval, appropriate insurance protection for the building and its content
- As appropriate, obtain competitive bids for services, projects, and contracts.
- Develop and implement a program of preventive periodic maintenance.
- Monitor utilities usage and identify areas for improvement and corrective action.

4. Membership:

- Provide initial contact with prospective and new members, offering information on services, programs, and dues structure.
- Maintain accurate membership records which reflect all pertinent data as to individuals and families.
- Assist in planning of strategies for growth and membership retention.

5. Board Committees and Auxiliaries:

- Serve as a resource for committees and auxiliaries.
- Serve as a liaison between committees and auxiliaries.
- Help staff committees, and assist with the planning and implementation of their programs.
- Attend special committee meetings as warranted.

6. Fundraising:

- Assist in the development and supervision of all fundraising activities.
- Assist in the development and management of Capital Campaigns.

7. Program Coordination and Calendar Development and Management:

- Coordinate scheduling of activities for all Synagogue groups.
- Supervise the pre-planning of the year's activities to ensure a balanced calendar.
- Provide the administrative and logistical support required for the smooth running of events.

8. Purchasing:

- Serve as the central purchasing agent assuring cost effectiveness.
- Monitor all expenditures.

9. Rentals:

- Oversee the rental of the facilities to members and the community at large including contracts, collections, and scheduling of staff.
- Develop, implement and enforce Synagogue policies in regard to caterers, photographers, musicians, etc. who provide services within the Synagogue building.

10. Fiscal:

- Assist the Treasurer in maintaining fiscal records and presenting monthly and annual financial reports.
- Assist the Budget Committee in the preparation of the annual budget.
- Assist the Treasurer and the Financial Committee in monitoring the collection of dues.
- Survey and make recommendations on dues and fees.

11. Insurance:

- Research, negotiate, monitor and recommend to the Treasurer benefit packages including health insurance, disability insurance, retirement plans for all staff as appropriate.

12. Relations:

- Serve as a liaison between the Congregation and the community in order to promote Brooklyn Heights Synagogue's visibility.
- Maintain ongoing contact with the local media.
- Act as an advisor and assist with all Synagogue publications (i.e., bulletin, mailings, directory, etc.)

13. Professional Development:

- Participate in local Association of Temple and Synagogue Administrators and NATA (National Association of Temple Administrators) in order to network with other administrators and gather information.

14. Synagogue Records/Archives:

- Maintain the various Synagogue records, e.g. membership data, newsletters, minutes, and all historical and archival records.

RESPONSIBILITIES OF THE EXECUTIVE DIRECTOR

Exempt (Y/N): Yes

Board Member Liaison: President of the Synagogue or his/her designee

SUMMARY: To ensure that the synagogue operates and plans ahead in a manner which is responsive to the needs of its congregants; to ensure that the religious, educational, programmatic, and business operations of the synagogue synchronize in a manner which best effects congregant needs.

The Executive Director oversees and is ultimately responsible for the synagogue operation and management, including its business office, programming, marketing and public relations, physical plant, supervision of non-contractual synagogue personnel, and the overall management and day-to-day operations of Tiferet Bet Israel. The Executive Director takes ultimate responsibility for, and provides leadership and direction, in partnership with the Rabbi, Cantor, Directors of Education and lay leadership, to program development and management, fund-raising stratagems and coordination, membership relations, recruitment and retention, resource management (both financial and human), and overseeing capital campaigns and building programs.

- *The Executive Director serves as the lead administrator of the Congregation to implement policy decisions of the Board of Directors.*
- *The Executive Director provides for the day-to-day management of the synagogue's fiscal, physical and administrative affairs.*
- *The Executive Director works with the Rabbi and other professionals within the synagogue to develop annual plans for programs and activities.*
- *The Executive Director administers the procedures and maintains the physical environment within which the Congregation's worship, educational, cultural and social activities are carried out.*
- *The Executive Director is the person through whom all Congregation activities, program and communications are arranged and coordinated.*
- *The Executive Director is responsible for administering and supervising and budgeting for all clerical and building maintenance personnel.*

The Executive Director is to manage and provide leadership to the administration of the synagogue, and in so doing, help create and maintain an environment which:

- is warm, welcoming and inviting.
- maintains a professional environment.
- serves the needs of Clergy and the Congregation.
- establishes and maintains conditions in which Clergy can function optimally to meet congregants' religious, social and community needs.

- insures that office and custodial staff display an attitude of respect toward Clergy, congregants and all visitors in keeping with synagogue goals

The major areas of responsibility, directly managed or managed through subordinates, described in more detail, include:

- I. FACILITIES MANAGEMENT
- II. ADMINISTRATIVE SUPPORT AND OVERSIGHT
- III. PUBLIC AND COMMUNITY RELATIONS
- IV. MEMBERSHIP
- V. FINANCE AND BUDGETS

AREAS OF RESPONSIBILITIES FOR EXECUTIVE DIRECTOR

I. FACILITIES MANAGEMENT

The Executive Director is responsible, either directly or through direct reports, for the appearance and smooth operation of synagogue building, grounds, property and equipment.

A. Building and Grounds: Oversee maintenance of physical plant

- Arrange for prompt repair or replacement of articles, as necessary.
- Assess safety and security of building and make recommendations to board as needed.
- Walk site on a regular basis to assess conditions, keep building and grounds and cemetery in proper state of appearance, cleanliness and safety.
- Supervise custodial staff' in maintenance, care; repair and security of physical facility, including religious articles.
- Will have responsibility for review and recommendations of insurance policies and facility service contracts.
- Make recommendations to Board, as necessary, to insure implementation of plans.

B. Property and Equipment: Maintain property and equipment in excellent condition.

- See that all property and equipment is clean, in good repair and in proper use.
- Anticipate, schedule and authorize repairs, as necessary.
- Maintain schedule for replacing, updating and maintaining equipment, property and supplies.
- Establish and maintain accurate, current inventory of property, equipment, supplies, archived and stored material.
- Supervise custodial and office staff with regard to above.

C. Calendar: Facilities Scheduling and Use

- Maintain accurate, reliable up-to-date master calendar for all synagogue programs and events.
- Create and maintain needed forms for collecting information to contain in calendar.
- Schedule use of all synagogue facilities.
- Provide requested set ups.
- Attend and supervise all special events (to be determined on an event by event basis) to ensure smooth operation,
- Market synagogue facility usage/rental and oversee all aspects of facility use.
- Coordinate calendar with Caterer.
- Ensure that members holding special events understand procedures and responsibilities.

D. Services

- Attend religious services and holiday celebrations, as required.
- Provide support for religious services and holiday celebrations.
- Supervise all administrative aspects of High Holiday services.
- Provide and supervise the smooth operations of Friday night, Saturday morning, High Holy Days, all other holidays, Bar/Bat Mitzvah ceremonies, weddings, funerals, other life cycle events.

II. ADMINISTRATIVE SUPPORT AND OVERSIGHT

The Executive Director is responsible, either directly or through other direct reports, for the smooth administrative functioning of the synagogue and for all synagogue office management.

A. Administration

- Supervise, train, remediate and evaluate clerical and custodial staff.
- Delegate and oversee work as appropriate.
- Allocate staff workload and work flow.
- Oversee quality and timeliness of office staff output
- Create administrative operating systems for routine synagogue business, as well as emergency, overload situations.
- Draft and implement staff job descriptions, including qualifications and standards of conduct
- Create and maintain an office "policy and procedures manual."
- Ensure that notices of congregant birthdays, anniversaries, tributes, births and deaths are properly distributed.
- Coordinate and produce Shabbat bulletin.
- Generate office correspondence in a timely fashion
- Review all synagogue correspondence to ensure accuracy and consistency with synagogue

B. Personnel

1) Office Staff

- Recruit, develop and terminate all office staff.
- Establish personnel procedures and standards for all employees. This should include pay scales, hours, vacations, raises, dismissals, etc., as well as social security and benefits, in accordance with federal and state law.
- Create and maintain Employee Handbook.
- Mediate interoffice conflicts.
- Maintain accurate and confidential personnel files
- Meet privately with each member of office staff to review individual performance at a minimum of one time a year.

2) Professional Staff

- Attend regular Professional Staff meetings.
- Serve as Staff member on specific committees.

C. Record-keeping

- Maintain and update all synagogue records accurately and securely, to include: deeds, permits, insurance agreements, maintenance contracts
- Maintain and update records of all synagogue business, including: By-laws, Board minutes, archived materials, etc.

Maintain and update accurate and confidential files on all synagogue members, including: family demographics, yahrtzeits, anniversaries, births, deaths; etc.

Establishing and maintaining archives for the preservation and care of all the Congregation's records, minutes, bulletins, mailings, yearbooks, etc.

D. Meetings

- Attend all meetings of Executive Board, Board of Directors, Committees and Congregation as instructed by Board, President or Senior Rabbi.
- Schedule and chair regular office staff and maintenance meetings.

E. Computer and Telephone Systems

- Evaluate, maintain and update computer and telephone systems to ensure optimal efficiency in administrative areas.
- Review the hardware and software in use, and compare with new developments in marketplace. Make recommendations to the Board as needed.

III. PUBLIC AND COMMUNITY RELATIONS

A. Public Relations: Promote positive image of synagogue among staff, congregants and community

- Edit, in collaboration with others, all synagogue publications, including monthly newsletter
- Oversee all public communications from all synagogue committees and affiliate groups.
- Co-ordinate press releases to all Jewish and relevant media.
- Help to make synagogue visible in neighborhood and community, promoting membership growth and development.
- Attend umbrella and/or professional organization meetings, such as Naase, Devasa, etc.

IV. MEMBERSHIP

The Executive Director is responsible for promoting the well being of synagogue membership

A. Current Membership

- Ensure the retention of synagogue members through ongoing dialogue with the congregation.
- Handle all financial issues of members, including dues relief. Promote image of synagogue as caring, courteous and confidential in this area.
- Develop tools for assessing new and existing member interests and expertise as a means to assisting the synagogue in its activities and programs.
- Maintain membership records to include demographic data, synagogue use, etc. Communicate with Clergy and Membership Directors with regard to members' personal or institutional concerns and life cycle events.
- Issue membership reports regularly, or as requested by Board or Rabbi.

B. Prospective and New Members

- Respond to inquires from all prospective new members. -
 - Arrange for meetings with interested families.
 - Develop and managed "new member open houses."
 - Prepare and distribute membership packets.
- Help orient and integrate new members to the synagogue community.
- Co-ordinate exit interviews with exiting members.

V. FINANCE AND BUDGET

The Executive Director shares the administrative responsibility for the financial management.

A. Budgeting

- Prepare and recommend to Board the annual budget; maintain controls over the annual budget.
- Offer insight and guidance to Directors to help prepare their budgets.
- Oversee all expenditures as per budgetary guidelines.
- Provide frequent mid-year updates to Directors and schools with regard to "actual vs budget " comparisons
- Prepare financial reports and statements as requested by Board, President or Treasurer.

B. Income

- Supervise and approve allocation of incoming monies.
- Will assist in the development and supervision of all fund raising activities held on behalf of the congregation.
- Supervise comptroller/bookkeeper in billing and collection of membership dues, fees for facility use, and all other accounts payable.
- Ensure that membership dues and fees are collected.
- Maintain analysis of members' accounts, and recommend policy in establishing adjusted dues as needed.
- Maintain records of other income, including gifts, endowments, memorial funds and annual fund.

C. Expenses

- Approve all expenditures according to budgetary guidelines. Supervise personnel working in this area.
- Prepare proposed annual administrative and office budget.
- Maintain overview of synagogue financial health; avoid unnecessary duplication. of expenditures.

D. Fundraising

- Provide leadership and staff support for fundraising.
- Articulate and support the execution of fundraising strategies.

E. Purchasing

- Serve as central purchasing agent for all departments of synagogue.
- Purchase equipment and supplies as necessary.

VI. PROFESSIONAL DEVELOPMENT

- Will attend as necessary organizational meetings and seminars relevant for ongoing professional development of synagogue executive directors.

EXECUTIVE DIRECTOR -JOB DESCRIPTION AND DUTIES

The Executive Director (ED) serves as the Chief Operating Officer of the synagogue, overseeing and managing the day-to-day operations of the synagogue. He/she reports directly to the congregation President and Board of Trustees. He/she works in partnership with the clergy and lay-leaders, representing the officers and board in the affairs of the congregation.

The ED's areas of responsibility are broad and varied. Specific functions include, but are not limited to:

Congregational/Lay Leadership Functions

Support to President, Board Chair, Executive Committee, Board of Trustees and Synagogue Committees

Focusing particularly on the "standing committees" indicated in the bylaws.

Congregant and Committee Support

Includes daily interaction with congregants to resolve concerns/complaints. Also includes assistance to volunteer committees/chevras in support of their projects and missions.

Fiscal Functions

Financial review/reporting

Includes monthly financial status review, regular review of delinquent accounts and providing support to the collections efforts, assistance with preparation of accountant's compilation, regular analysis of building/capital and other funds, oversight of billing process and congregant accounts, budget preparation, management of banking relationship.

Business Package, Workers Compensation and Health Insurance programs

Includes renewals and administration of existing programs.

Expenditure Approval

Includes review and approval of all synagogue expenditures in accordance with synagogue policies and approved synagogue budget.

Development Support

Includes assisting volunteer fundraising efforts such as the annual Mishloach Manot project, Judaica Craft Show and other revenue based events/activities.

Grant Writing

Includes applying for Homeland Security and other grants to pay for needed security and other equipment.

Management, Administration and Staff Leadership Functions

Staff Supervision

Includes recruitment, training and daily supervision of office and custodial staff, biweekly payroll, all issues relating to personnel including management of personnel policy and assistance with personnel issues in the religious school. Also includes allocation and assignment of personnel work load among staff to ensure timely completion of necessary work.

Calendar Management

Includes development of annual event calendar in conjunction with the Program Chair, Education Director and the Rabbi, as well as planning/preparation for day-to-day event management.

Building Management and Security

Includes oversight of daily operations, management of building maintenance and capital projects, hiring and management of all building contractors and security company.

Management of Building Rentals

Includes the need to maintain a balance between much needed rental income and BAS' use of the building, manage building policy relative to kashrut and other Jewish ritual/custom.

Communications

Includes regular review of synagogue communications, including but not limited to the weekly calendar, quarterly newsletter and regular email communications. Provide support to Communications Chair and Newsletter editor. Prepare and send bereavement communications to congregation and oversee synagogue internet and email systems and communications.

Management of Technology

Includes acquisition and maintenance/management of computer hardware and software, phone system, third party software applications such as front door access system, internet streaming and DSP sound system management to ensure efficient performance of office responsibility and effective communication with the congregation.

B'nai and B'not Mitzvah calendar Planning and Management

Work with rabbi to assign dates to each class and its students.

Bereavement Support

Includes 24 hr. response in the event of congregant need, arranging shiva team response and administration of synagogue cemetery sections and plots.

High Holy Day Planning and Implementation

Includes hiring of all necessary contractors, event planning and management, coordination of all volunteer responsibilities and emergency preparation, coordination of congregant honors and other related issues. Also includes rental of all needed supplemental equipment and extensive security preparations.

Executive Director Responsibilities

The Executive Director (“ED”) serves as the chief operating officer of the synagogue and is responsible for the implementation of all of the administrative and financial policies of the board of directors. The ED reports to the president and works closely with the Senior Rabbi.

The ED shall possess the following competencies.

- Work harmoniously with and fulfill the needs of members, staff and the board of directors.
- Create administrative and financial systems that enable rabbinical, lay leadership and staff to implement the mission of the synagogue and mikvah.
- Raise funds for the synagogue.
- Oversee synagogue financial, accounting and membership reporting systems.
- Coordinate space allocations on the synagogue campus.

Specific Responsibilities:

General Operational Requirements

- You must be physically on premises 90% of the work day.
- Perform daily walkthroughs
- Perform monthly walkthroughs
- Perform quarterly walkthroughs
- Create a checklist of items to be inspected on a daily basis
- Create a checklist of items to be inspected on a monthly basis
- Create a pre-event checklist
- Create a pre Shabbat / holiday checklist
- Create (and tune as required) a daily, monthly, and quarterly checklists
- Create a list of tasks to be performed by a custodian by event. For example, if a new custodian shows up and you are to have a sheet of paper representing his duties for that day/event to review with the individual.
- Maintain a paper AND computer log of all walkthroughs. Note any issues and move to Issues list.
- Maintain issues list with notes
- Maintain a list of vendors that you are in contact with including last contact and next steps. Pester vendors on regular basis to get issues closed (e.g. cubbies, AC)

Administrator

Board of Directors

- Serve as liaison to committees and aid in committee projects.
- Attend meetings (as requested) of the congregation, board and committees.
- Assist in the identification of new lay leadership, volunteers and aid in the acculturation of new families in the community.
- Point out issues that need to be addressed.

Senior Rabbi & Assistant Rabbi

- Assist in the areas of ritual, educational and specific events, programs, simchas, funerals, kiddushim, etc.
- Be available to help senior rabbi for rabbinic obligations
- Assistant Rabbi
- Assist in the preparation, scheduling and publication of the annual Teshuva Campaign
- Assist in the preparation, scheduling and publication of the annual Adult Education Brochure.
- Market and advertise all Rabbinic programs to the community.
- Assist in the maintenance and operation of the Tape Library.

Youth Directors

- Supervise Youth Directors.
- Assist in all technical aspects of programs.
- Ensure that Teen Lounge is operational.
- Maintain mentoring relationship with teenagers.
- Create calendar of regular events.
- Coordinate supervision of the Teen Minyan and Gabaim.
- Coordinate Bar Mitzvah program.
- Maintain mentoring relationship with teenagers.

Office Staff

- Manage office personnel, including scheduling of vacations and managing benefits.
- Be responsible for purchasing and inventorying of all office supplies and equipment.
- Ensure that all personnel have appropriate equipment in order to accomplish their jobs effectively and efficiently.
- Have authority to hire and fire office personnel with consent of the president.
- Act as liaison to board and rabbinate regarding office staff.
- Ensure that all mailing are prepared and sent out on time.
- Provide support services where necessary.
- Maintain up to date information to be sent out in the High Holiday Packet.
- Proof all publications before they are published in print or on the website.
- Create contracts that detail all obligations and benefits.
- Human resource development at monthly staff meetings.
- Hire and fire as required
- Ensure that all personnel work required hours and days
- Ensure that office is NEVER unattended during business hours (except for lunch)
- Manage work within the office across the office staff to maximize efficiency
- Suggest changes to BOD if it will affect budget.
- Implement all changes whether initiated by you or the EXEC

Custodial Staff

- Ensure the cleanliness of the entire campus.
- Order janitorial supplies.
- Ensure that custodian complete daily checklists of responsibilities.
- Distribute a weekly calendar of programs and update on a daily basis.
- Ensure that custodial obligations are not hampered by other functions.

Volunteers

- Develop a pool and manage the use of volunteers for routine work or special events.
- Enlist the help of teenagers for community service opportunities.

Services:

Members Services

- Coordinate membership events and recruiting with membership chair.
- Maintain complete and up to date membership records.
- Maintain & implement master calendar
- Publish weekly activity sheet detailing upcoming programs and events.
- Publish quarterly synagogue magazine.
- Be responsible for and coordinate the scheduling for all membership or public events, programs, simchas, funerals, kiddushim, etc.
- Coordinate activities of auxiliary and associated organizations as they relate to and interact with the synagogue.
- Create and update holiday seating chart for all of the minyanim.
- Assist members with simcha planning.

Synagogue Services

- Implement policy and management decisions of board and halachic decisions of the Senior Rabbi.
- Ensure that appropriate lighting and air conditioning is set in a cost effective manor.
- Meet with representative of each minyan.
- Create a handbook of all programs and protocols.

Public Relations

- Be responsible for promoting synagogue's events and activities with media in conjunction with the senior rabbi and president
- Coordinate and control the placement of all paid advertising.
- Ensure that potential membership packets are kept up to date and distributed appropriately.
- Take pictures at synagogue functions and post them in their respective locations.
- Maintain relationship with Local Vaad Hakashrut and approved catering facilities
- Ensure that the website is current and up to date with a complete listing of all programs and services.

Financial Matters:

- Supervise billing and collection of all dues, fees and assessments.
- Oversee the preparation and distribution of budget and other financial reports to board and congregation.
- Oversee recordkeeping and reporting of income and expenditures for the synagogue and auxiliaries.

- Maintain accurate aged accounts receivable of all members.
- Maintain synagogue's insurance portfolio, make recommendations to the board as required and implement the board's decisions.
- Weekly review of synagogue expenses against budget
- Monthly meeting with treasurer to review budget
- Verification of satisfactory job completion prior to authorizing payment
- Participation in budget committee
- Participation in all major (budget line itemed) fund raisers in support role.
- Suggest improvements to minimize costs
- Weekly - Call all Yahr Zeheit individuals and ask them to sponsor Seudah Shelisheet.
- Ensure that Synagogue tax exemption, sales tax, corporate papers are filed immediately (annual)
- Verify that insurance policies are received
- Verify that vendors employing personnel on site have certificates of insurance – Liability (minimum \$1M) and workers comp (or exemption)
- Begin to shop for new insurance 90 days prior to expiration (mark your calendar)

Fundraising

- Work with lay leadership in development and implementation of fundraising opportunities and programs
- Assist in developing a master plan for fundraising.
- Assist in the annual journal dinner
- Assist in the annual golf and tennis classic

Physical Plant

Building Maintenance and Construction:

- Manage janitorial personnel and have authority to hire and fire with the consent of the president.
- Oversee and program utilization of space for events, functions and minyanim.
- Monitor all contacts with vendors regarding ongoing maintenance, new construction and capital improvements.
- Responsible for all security of the synagogue
- Ensure that the playground is safe and operational.
- Check all thermostats to ensure that they are set to go on and off for planned programs or services.
- Maintain an inventory of all Multi media equipment.
- On call for burglar alarm and fire alarm.
- Negotiate new contracts with vendors.
- Complete parking lot and site to be cleaned every sunday morning (lowest traffic day). In the event that a holiday or function makes that impossible, then the cleaning should be scheduled for the next possible day.
- Paint all arrows twice a year.
- Clean and paint bumpers and lines once a year.
- Keep surface of paved parking area in good repair.
- Parking lot to be sealed every 3 to 5 years.

- Ext. of building to be painted every 5 to 7 years.
- Police grass parking for litter and dumping lot every month.
- Check for weeds monthly in between pavers around building. Treat weeds that are found.
- Walkways to be checked daily and swept as needed.
- All ladders are to be locked when not in use. Large ladders can be stored on the exterior of the Mikva (there are hooks there) and MUST be locked when not in use.
- Exterior lighting to be checked monthly and repaired as required.
- Property out side fence to be policed once a month.
- Keep area in front of office and main shul entries clean at all times.
- Keep all fire exits complete clear of storage items and debris.
- All exterior doors should be kept clean, in good repair and painted as needed.
- All exterior doors to be kept locked at all times other than for events and per YHS contract.
- All exterior doors to be kept in good working order
- Mens bathrooms to be steam cleaned monthly. Womens as required, but no less frequently than twice/year (Pre Passover and Rosh Hashana)
- Carpets to be vacuumed immediately after an event.
- Tile and marble floors to mopped clean every night and immediately after an event.
- All A.C. filters to be replaced every 4 months (or per recommendations of a professional AC company)
- All offices and library cleaned and vacuumed every day, and dusted and at least once a week.
- Carpet in social and kiddush room to be vacuumed every day or more as needed.
- Sanctuary to be checked Friday morning (and erev yom tov and the morning prior to an event) and vacuumed as needed and ark doors dusted as needed.
- Glass mechitzah to be cleaned every Friday morning as needed.
- Chairs in sanctuary to be kept in neat rows when room is not in use.
- Kick plates on doors to be inspected weekly and cleaned as needed.
- All doors and walls to be checked weekly and kept clean, in good repair and touched up as needed.
- All sconces, memorials and bookcases to be checked weekly and dusted as needed.
- Rails on ramp, bema and up to ark to be scraped and painted.
- Electric fixtures to be checked weekly and kept in good working condition and bulbs changed as needed.
- Folding partitions to be aligned and locked in position at all times.
- Marble and tile floors to be professionally filled as required, sealed and polished before Rosh Hashanah and Passover.
- Duct grills to be cleaned once every 3 months.
- Electric lights turned off when a room is not in use.
- AC to be adjusted when a room is not in use
- Bathrooms
 - Cleaned nightly during low traffic times and hourly during high traffic times including Shabbat, holidays and any events. A final cleaning is required at the end of an event prior to building close-up.
 - Bathrooms to be steam cleaned monthly
 - Mopped and cleaned every night and as needed.

- All exposed plumbing to be cleaned daily.
- Use strong disinfectant for bathroom
- Building should not be left unattended at any time when doors are unlocked.
- A custodian must be present at all times during services
- Tile and marble floors to be kept in good repair.
- All 1st floor windows and door side lights to be cleaned every Sunday morning. They are to be checked daily and spot cleaned as needed.
- Repairs should be scheduled so that the building looks its best prior to Rosh Hashanah and Passover.
- Sunday before custodian leaves the building it should look completely clean for Monday morning.
- Lobby in bet midrash and bathrooms in that area must be kept clean at all times that the office is open. This entrance is the Shul office entrance and it is important the visitors see a clean area upon entry.
- All mirrors to be cleaned every Sunday morning, checked daily and spot cleaned as required.
- Entrance doors are to be locked at all times (except for events and services)

Shabbat & Holidays

- Ensure that all siddurim , Chumashim and Machzorim are in their appropriate places.
- Set up each room for its respective Minyan as indicated by the gabaim and ritual committee
- Arrange for Kidushim when requested.

Catering

- Oversee management of catering operations and related contract terms.
- Assist officers in development of menus, obtaining proposals and negotiating contracts.
- Coordinate communal functions at synagogue as well as other locations.
- Ensure that the appropriate amount of food is ordered for each kiddush and seudat shlishiet.
- Maintain the kashrus standards set up by the local Vaad.

Programs

- Ensure room request are completed
- Ensure all audio visual equipment is set up as requested
- Maintain a complete inventory of shul movable property
- Order necessary items for annual synagogue programs.
- Journal Dinner
- Mitzvah Marker
- Purim Carnival
- Holiday and Commemorative Programs
- Set up and coordinate new members tea.

GUIDE FOR EXECUTIVE DIRECTOR SEARCHES

The National Association for Temple Administration and the United Synagogue of Conservative Judaism, working with the North American Association of Synagogue Executives, offer guides for congregations searching for a new executive director/administrator.

Both of these documents ask synagogue leaders to think about the position in terms of functional roles, required competencies, and level of authority. They ask synagogues to use a variety of tools that include titles, organizational charts, and job descriptions to create a transparent definition of the role that helps candidates understand what success looks like and guides synagogue team members to realistic expectations.

These two guides may be helpful in the lay leaders' quest. When the time comes to hire a new ED/A to address the questions raised by this report, they can design a role with an appropriate focus, support congregational priorities, and find a balance between operations and strategic or engagement work.

A Guide for Congregations Searching for a New Executive Director

Introduction

The National Association for Temple Administration (NATA) serves synagogues and their administrators and executive directors. One of its roles is to be a resource for congregations looking for executive directors and administrators (collectively referred to as "executive directors" in this document). The purpose of this resource is to provide guidelines and direction for congregations and executive directors who are planning to begin a search. We hope this information will make the process go more smoothly for both the candidates and the congregation, and that it will lead to successfully matching expectations and needs.

NATA's membership includes executive directors with a variety of experiences and backgrounds. Many executive directors have significant professional experience outside of the synagogue, both in the for-profit and not for profit worlds. They may have also received professional certification from NATA, which includes Senior Status or a Fellow in Temple Administration (FTA).

A senior member of NATA is a temple administrator who has completed a minimum of three years of active service as a full - time administrator in a Reform congregation, and has completed a certain number of specific examinations in the subject of synagogue management taught by NATA members or outside teachers. This is the first part of a formal certification process to become a Fellow in Temple Administration (FTA), which is a joint program of the URJ, NATA and the CCAR. The F.T.A. designation requires passing exams in Judaic studies, reading knowledge of Hebrew and the writing of a thesis.

The process of searching for an executive director involves several steps and considerations which are listed below and described in more detail.

The process of searching for an executive director involves several steps and considerations are listed below and described in more detail:

1. The congregational leadership should define the scope of management, leadership and governance responsibilities of the ED position before going into the search process. The leadership needs to look at what strengths are needed for the congregation at present and in the future. This should then lead to the development of a job description. The active search process generally shouldn't start until the congregational leadership is clear about the job requirements.
2. A search committee should be established that can define the search process and take responsibility for it. This may be done in conjunction with the leadership. It is important for the search committee, for example, to determine the interview and decision-making processes.

3. Leadership needs to decide how to establish a good transition process for introducing the new Executive Director to the staff and the congregation. This may involve an exit transition for an existing Executive Director. (Ethical, treating the departing ED with respect)

Michael Liepman, the NATA Executive Director is available to assist NATA members and URJ congregations in the search process, and members are encouraged to consult with the NATA office as necessary. In addition, NATA is made up of many seasoned experienced executive directors, who can be wonderful resources and can be contacted through the NATA office.

The NATA Job Search List

NATA provides potential candidates with a list of open positions in congregations and institutions on its members only section of the website: www.natanet.org. NATA members can access the website postings. They also receive access to NATA-NET, the private Yammer network available to all NATA members. NATA members may also receive periodic email reminders and updates. Non-NATA members, who pay a fee are also given access to the website postings. A congregation or such institution (hereinafter referred to as the "congregation") interested in having a position posted can contact the NATA office by email at mliepman@natanet.org, or by phone at 1-800-966-6282. To post the job, the congregation needs to follow these simple steps:

1. Make sure that you have read the [NATA Job Listing Guide](#).
2. Have you completed a concise but accurate job description? See the NATA website for [sample job descriptions](#)
3. Fill out an online [application form](#) The NATA office will verify that the current executive director if there is one, is aware that the congregation is going through a search process. After the NATA office receives the completed application, the congregation will be contacted by the [NATA Executive Director](#) to review the application with them and to answer questions. Once approved for posting, the new position is posted on NATA's website in a secure section.

The Search Process

The congregational leadership needs to define the executive director's scope of management, leadership and governance responsibilities. Just as there are many different congregations, there are many different kinds of executive directors, with different levels of responsibilities with regard to governance and the internal operations of the institution. This is often culturally based, and reflects historical perspectives, the role of lay leadership and the role of clergy and other senior staff positions. Before beginning the search process, it is important that the leadership reach consensus about the scope of management, leadership and governance responsibilities of the executive director

position so that the search committee can be properly charged. This conversation will generally involve the lay officers of the congregation and the senior rabbi.

An Important Checklist

The leadership needs to consider the following:

What is the appropriate title for this position? Most administrators in congregations are referred to as executive directors, reflecting both a change in common parlance and an evolution in the position and the scope of responsibilities. This transition is continuing as congregations have increasingly complex needs and fewer available lay people to handle the multiple functions that need to be managed.

Who does the executive director report to, and why? In most congregations, executive directors report to the president or some other lay officer (i.e., VP Administration) although in some congregations the executive director reports to the senior rabbi. Regardless of the formal reporting structure, a strong and positive collaborative relationship between the rabbi and the executive director is crucial.

Who does the executive director supervise, and why? This question deals with the organizational structure of the synagogue.

Who are the executive director's indirect ("dotted line") supervisions, and why? This question deals with the day-to-day operations of the synagogue.

What are his or her direct and indirect responsibilities? (i.e. membership, development, communication, facilities, finances, education, programming, lifecycle, ritual, cemetery, events management, committees and board relations, general administration, external community, and human resources) This question deals with the executive director's scope of responsibilities.

What is his or her responsibility with regard to the board, and the executive committee (officer group), and other committees? This question relates to governance issues.

What are the salary, benefit, and other compensation package? The package needs to be fair, and reflect the requirements of the position and the marketplace. NATA has some summary salary and benefit information that is periodically updated and is available to posting congregations and to individuals. The latest executive summary of the salary survey is available on the Tent or you can contact Michael Liepman.

What is the initial hiring term (and who negotiates these terms)? Many executive directors have multi-year contracts (often 2 years for the first contract, and then 3 or 5 years for subsequent contracts). Not all executive directors have contracts.

Establish a Search Committee

Often, the temple president appoints the search committee and designates a chair. Potential committee members should be made aware of the time frame for the search and the time commitment to the process before agreeing to serve on the committee. (Refer again to who is on the committee – HR pp and how many) It is possible that the executive director search will take months to complete. The leadership may want to consider an alternate short-term plan for managing the synagogue during this search process, if it is delayed. If that is case, the short and long-term plan should be discussed with Michael. The process may include a request for candidates interested in short-term, interim work.

Search committee members need to be advised of the confidential nature of the search, that they may not independently speak to anyone about the candidate (including references) without permission and that they need to keep resumes and other information and materials about the candidates in a secure place. Disagreements stay within the committee.

The search committee should consider whether it is important that constituency groups from within the congregation be represented on the committee or during the interview process.

Consider the following:

- A current officer
- A current board member
- Senior rabbi and/or other staff
- Congregants from different constituency groups, such as religious school parents, ECE parents, young adults, empty nesters, seniors, and long-standing members of the congregation.

When appointing members to the search committee, one member should be designated as the contact for the applicants throughout the process. One individual from the committee needs to be given responsibility for regular communication with all applicants and with the NATA office as well as someone, (the chair, usually) who reports regularly to the officers/Board about the search.

When first called together, the search committee should take time to reflect on the congregation's priorities and vision, and may choose to discuss some or all the following topics as part of this preliminary work:

Important Preliminary Questions

- The religious environment of the congregation (does it matter if the candidate isn't a Reform Jew?)
- Vision and mission of the congregation

- Congregation's strengths and weaknesses
- Key challenges of the next year
- The "ideal" applicant
- Core competencies and key personal characteristics that are required, and the essential functions. For example,
 - Must this person have a financial background?
 - Be able to multitask?
 - Be able to communicate effectively in writing?
- What are the hours and days that are expected?
 - Does this person work on Shabbat?
 - During Religious School, especially if on a Sunday?
 - Does he or she get a day off during the week?
 - Will he or she attend board and executive committee meetings? Staff those meetings? Staff other committees?
- Who should the candidates meet in addition to the search committee? Clergy and professional staff, administrative staff, members of the board and executive committee, and some representative congregants and at what point in the process.
- In addition, the committee needs to decide what kind of vote it will take to recommend a candidate. Does the vote need to be unanimous, by consensus, and not by formal vote?
- The search committee should also talk about the search schedule, including blocking out time for meetings, interviews, and debriefing sessions as close to meeting candidates as possible.

Develop the Job Description for the Executive Director

The first task of the search committee is to create a job description. This may involve editing a current job description or creating a new description. The job description needs to reflect the management, leadership and governance responsibilities established by the leadership and further refined by the search committee in its initial conversations. The NATA web site has sample job descriptions listed.. The job description is crucial in the process so if there are any questions, contact the NATA office.

A job description should include the following:

- Title
- Reporting structure
- Job summary
- Key responsibilities with specific duties ("Essential Functions") such as financial management, and membership

- Core competencies, including expectations of character attributes necessary for the position, such as strong team building and problem-solving skills
- Key responsibilities for programs, committees and areas within the organization such as membership, finances, facilities, development.

In addition to the job description, the search committee should put together other material that will assist candidates in understanding the congregation and the position. These materials could include: strategic plans, mission statement, membership packet, religious school handbook, organization chart, temple bulletin, recent publicity, information about the area, audited financials, job description, and budget information. Some of these materials may go to any applicant who responds to the employment ad, and some of these materials (i.e. financial, organizational chart, etc.) may go only to candidates who are further along in the process.

The search committee needs to tell candidates whether the congregation pays expenses related to the interview process including transportation (local and long distance), hotel and meals.

Start the active search process

Go through the NATA job listing process by filling out a job listing form available on the NATA website. NATA recommends that you review other locations for placing advertisements including local Jewish papers, national papers, web sites and search firms.

Any resume that comes in should receive an acknowledgement.

The committee needs to decide how resumes are circulated among search committee members, and what the process is for feedback on the resumes, and to decide which individuals will be interviewed. Interviews are then scheduled with candidates. The committee needs to decide if the entire committee meets each candidate in the first round or whether the committee divides into subgroups for initial conversations with each candidate. The committee should also decide if these first conversations are in person or by phone. Each group should have the same list of questions and use the same basic format for consistency. One member of each interviewing group needs to report back to the committee.

As these initial conversations happen, the search committee needs to evaluate the candidates and decide which candidates to bring in for an in-person conversation (or a second interview). Generally, it is likely that there will be several candidates who make it to the second round. Those candidates who are no longer going to be considered should receive a letter thanking them for their interest and time, and letting them know they are no longer being considered.

The committee should invite second round candidates-often by phone followed up by a letter with more information and should discuss the following with those candidates:

- Feedback from their phone or initial face-to-face interview
- Names and brief background of the individuals with whom they will be meeting during this second round
- Expectations of the committee during the next phase of the interview
- References-may not, at this point, include current employer
- Specific questions that the candidate should be prepared to answer (i.e., "Given the materials that we have shared with you and what you know about our synagogue, what do you see as our greatest strengths and possible challenges over the next three years?")
- The timing of hiring (and candidate's availability)
- Some general salary and benefits information to make sure that both the synagogue and the candidate are aware of the scope of the employment package

The above may be done by phone, although it might be followed up with a letter confirming arrangements.

This second round of conversations should include formal and informal meetings and at least one meal. If possible, all candidates should be scheduled so that they don't accidentally run into each other. All candidates should be interviewed as closely together as possible so that when the search committee meets to evaluate the candidates the committee members' recollections are still fresh. If possible, the full search committee should have an opportunity to meet with the candidate in small groups or as a single group, as should members of the senior staff, additional board members, and congregants. It would be useful for the candidate, at this time, to also meet with members of the administrative, finance, educational and maintenance staff, and to tour the facilities. The schedule should allow for some "free time" during the visit so that the candidate has an opportunity to reflect on what he or she has heard and what additional questions and information he or she would like to discuss. Anyone meeting with the candidate should be handed a list of possible questions and what questions he or she cannot ask. Please check with an attorney for the specific guidelines.

The search committee should reconvene as quickly as possible after round two candidates have been interviewed to decide whether there is one candidate around whom there is consensus. If so, it may be appropriate to invite that candidate back for an additional conversation in person or on the phone to further explore any specific issues that may have come up and to confirm that candidate's continued interest in the position. If the search committee were considering more than one candidate, it would be important to have those candidates back in person for further conversations. This should be done in a timely manner. References should be checked before calling those finalists (or the finalist).

Those references will probably include individuals outside the candidate's workplace. Final references should include the candidate's current workplace.

Questions for reference check.

Remember to emphasize to the person calling and to the person being contacted that this is a confidential process and that you have the candidate's permission to speak with the reference. Following are some questions that you may want to include in your reference check:

- How long have you known the candidate, and in what capacity?
- What are the candidate's strengths and weaknesses?
- Has the candidate been successful in his or her current position?
- Given the opportunity, would you hire the candidate again, and for what position?
- What other information (which my prior questions did not elicit would be helpful to us)?
- May I call you back with further questions?

DO NOT at this point tell any of the other finalist candidates that they are no longer being considered unless they are candidates the committee feels would not be considered further under any circumstances. At the end, all finalist candidates not selected should receive a gracious letter letting them know that the position has been filled. This should be done in a timely manner.

At the additional conversation or face-to-face meetings, it is hoped that the search committee can build consensus around one candidate and is ready to make a recommendation to the board or whatever governing authority needs to approve moving forward with the selected candidate. Assuming that the governing authority approves the candidate, it is now time for whoever is authorized to call the candidate to offer him or her the position and to discuss the terms of their agreement.

Terms and Conditions of Employment

When negotiations have been completed between a candidate and a congregation/institution, the terms of the negotiations should be formalized in a written contract or letter of agreement signed by both parties. We urge both the candidate and the congregation/institution to seek legal advice before the contract is signed.

The following terms are recommended:

1. Term of initial engagement: two or three years
2. Salary-fair and equitable based on professional experience, job requirements, and the marketplace. NATA has salary and benefits information that may be useful to both the candidate and the prospective employer

3. Family medical coverage
4. RPB pension at 15 percent
5. Synagogue membership, religious school and ECE at no charge
6. Moving allowance
7. Continuing education, including NATA membership and conferences
8. Four weeks of vacation
9. Disability leaves and long-term disability insurance

Transition

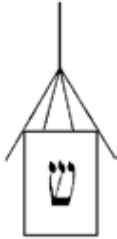
The process doesn't end with the formal engagement. The congregation should have a formal transition process in place that includes lay leadership and senior staff to welcome the new executive director, and to integrate him or her into the congregation and into the staff.

Bear in mind that this process can easily take an entire calendar year. In addition, congregations that have a current executive director need to consider how they will properly acknowledge the departing executive director, and what the transition should be between the two individuals.

In conclusion, we hope that the above information is helpful to your congregation as you begin the exciting and challenging process of looking for a new Executive Director. The NATA office will continue to be available to you throughout the process.

Good luck!

THE USCJ - NAASE JOINT COMMISSION FOR THE PLACEMENT OF EXECUTIVE DIRECTORS



מלאכת הקדש

MELECHET HaKODESH

The Holy Work of the Kehillah's Executive Director

This resource booklet is rightly entitled **Melechet haKodesh** because of the commitment to the synagogue mission shared by the kehillah's lay leadership, clergy, and executive director. It is through the operational and organizational framework, that the executive carries out his or her work as a valued member of the **Kley Kodesh**, those in whom is entrusted the sacred and impactful work on behalf of the Jewish community.

As a key member of the senior executive staff and an integral component of the congregation's Kley Kodesh, the synagogue's executive director is at once a manager, facilitator, role model, gentle guide, leadership partner and mission-driven individual with a deep commitment, a dynamic collegial network and an evolving skill set. The materials in this packet are intended to trigger conversations within the synagogue leadership about their vision for its future and the role of its new executive, given the needs of the congregation and its unique culture and potential. It is anticipated that these resources will help in fashioning an effective position description that advances the goals and meets the expectations of the congregation in a host of areas. Some of these resources are ideally suited for the preliminary envisioning conversations, and others for the various stages of the work of the search committee.

In addition to the documents in this booklet, there are links to electronic materials placed on-line by the NAASE-USCJ Joint Commission to assist your kehillah's search committee in its mission to bring together the priorities and vision for the congregation's and community's future with an experienced and enthusiastic executive possessing exactly the right skills and commitment to guide the fulfillment of that vision and the realization of its potential.

We wish you great success with your search and with your envisioning of the future of your kehillah!

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THE NAASE - USCJ JOINT COMMISSION FOR THE PLACEMENT OF EXECUTIVE DIRECTORS

For more information and for specific assistance,
or to arrange for a consultation, please contact us at
Placement@NAASE.org or Office@NAASE.org

THE SEARCH PROCESS: GETTING STARTED

Neal Price, FSA, ATz
Chairman, NAASE Placement Services

Dr. Ray Goldstein
Kehilla Relationship Team Leader

Dear Search Committee Chairperson,

*This is an exciting time for your congregation . . . presenting opportunities for new and visionary organizational activities, innovative approaches to the synagogue's tasks and challenges, and a revitalized leadership alliance, the **Kley Kodesh**, committed to doing the Holy Work of the congregation in fulfilling its mission We are delighted to partner with you in your search for the most fitting executive leadership available to you and your congregational community.*

The **NAASE-USCJ Joint Commission for the Placement of Synagogue Executives** welcomes this opportunity to assist you in the planning and implementing of your search for an Executive Director for your congregation. Before you set about completing the Placement Listing Form, we would suggest that your Search Committee be mindful of several factors that many years of experience have shown us to be relevant at this point by:

- NAASE (the North American Association of Synagogue Executives), USCJ (the United Synagogue of Conservative Judaism) and the Joint Placement Commission can assist you substantially and confidentially with a variety of elements of the search process. For consultation about structuring the administrative position, developing reasonable expectations, and the interactivity among the various leadership elements, the NAASE Executive Director, Harry Hauser, stands ready to assist you (631-732-9461 or office@naase.org). Please contact him with questions about the interview process, developing a workable and customized search strategy, or for information about the availability of candidates. A variety of materials for search committee study are available as well, from the NAASE office.
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- The Placement Commission functions year-round, with greatest activity occurring between February and May. But congregations may hire executive staff at any point in the programming year. The length of time for well-thought-out searches varies from several weeks to several months, depending on the nature of the position, the congregational needs, the remuneration package, the availability of candidates, and of course, the time of year. Congregations are advised to avoid waiting unnecessarily to initiate executive searches.
- This is an excellent time to review your existing staffing structure, organizational chart, long-range planning documents, and synagogue mission statement, to insure that the interviewing process is sufficiently reflective of the congregational realities, culture and aspirations, so as to yield the candidate most appropriate for the unique composition of your kehillah.

- When you complete the application to list the position, please recognize that the information you provide is the only information that candidates will receive, upon which to make their decisions about submitting resumes for your consideration. We cannot stress enough the need for completeness and openness about issues such as areas of responsibility, anticipated congregational or programmatic changes, long-term expectations, and remuneration.
- A number of congregations have asked us, “Why do you request a salary range for the placement listing?” The reason is that while professional compensation is certainly a negotiated matter between the congregation and the candidate, by providing a salary range the potential candidates have an opportunity to judge the viability of the position before both parties spend time and effort only to find that it might not be economically possible for the candidate to accept an offer. Also, the congregation runs the risk that viable candidates will not apply, because of the missing information that might motivate their interest. So, our experience tells us that supplying sufficient compensation information, even if only a salary range, proves to be helpful to the congregation as well, in knowing that candidates who apply are expressing an informed interest.
- If the position vacancy follows the incumbency of an Executive Director, please complete the professional obligations expected of USCJ-affiliated congregations as relates to their professional staff. These are outlined in the USCJ Guide To Congregational Standards. If there are questions in this regard, the Joint Placement Commission can refer you to knowledgeable consultants.
- Executives of many qualification levels request to be included on the “active placement list” of candidates. Meanwhile, congregations place their open administrative positions on a parallel “positions list”. Requests provided by congregations for candidates with specific experience levels and skill sets are made known to all actively searching candidates, and the respective individuals forward their resumes directly to the specific congregations. The availability of positions is distributed to all NAASE members via e-mail, with specifics provided discreetly to interested candidates.
- The service provided by the Joint Placement Commission is solely a referral service. No recommendations are ever made or withheld about individual candidates, nor are screenings applied to the experiences or skills of the respective candidates. Accordingly, the fiduciary responsibilities of synagogue leadership that apply to all areas of congregational life apply here. Very specifically, it is solely the responsibility of the synagogue’s Search Committee or designees to actively screen, confirm and validate whatever information is given it by candidates, both in writing and orally, that enter into the conversations and negotiations of the search process.
- All executive candidates referred to congregations by the Joint Placement Commission are members of their professional association within the Conservative Movement, the North American Association of Synagogue Executives (NAASE). It is generally expected that successful candidates who are not yet affiliated with NAASE at the time of commencing congregational service will do so in good time, to the mutual benefit of both the congregation and the professional.

Again, we bring you the best wishes of the entire NAASE-USCJ Joint Placement Commission for a successful search, resulting in a long, productive and respectful association between your new Executive Director, the other professionals and lay leadership, and the dedicated members of your kehilla and community.

Sincerely,

Neal Price, *FSA, ATz*
 Chairperson, NAASE Placement Services

Dr. Ray Goldstein
 Kehilla Relationship Team Leader

..... ADMINISTRATIVE FUNCTIONING

Resource for Board of Trustees/committees
Board leadership training
Agenda development
Liaison to all auxiliary organizations
Program ideas/techniques
Financial reports and analysis
Representative to Board/committees

Fiscal Management

Accounts payable / receivable
Financial reporting
Budgeting
Purchasing / contracting
Special arrangements
Investments (w/appropriate lay committee)
Insurance

Facilities Management

Building usage scheduling
Space allocation / preparation
Building maintenance / repair
Personnel management
Cemetery management
Security

**Prioritizing, Maintaining, Implementing
Synagogue Calendar**

Bar / Bat Mitzvah dates
Synagogue events / holiday programming
School / youth programming
Weddings and receptions
Meetings
Community usage

On-Site Implementation of Board Policy

Computer Management
 Hardware / software
 Membership database
 Cemetery control
Personnel management - support staff
Mailings / newsletters
Liaison to volunteers

..... DEVELOPMENT ROLES

Fundraising events
Long-range planning
Capital / endowment campaigns
Fund development and special needs appeals

..... MEMBERSHIP

Recruitment / retention
Liaison to:
 Volunteers
 Membership
 New members
 General membership
 Officers and Board of Trustees
 Committees

**..... COORDINATION WITH
PROFESSIONAL STAFF**

Special projects / events
Holiday programming
Regular synagogue activities
Assisting families with life-cycle events

**..... SYNAGOGUE FOOD SERVICE
COORDINATION**

Oneg Shabbat / Kiddush
Receptions / celebrations
Caterer coordination (in-house or panel)
Kashrut supervision

..... PUBLIC RELATIONS AND OUTREACH

Dissemination of Congregational News via:
 Bulletin Flyers News releases
 Advertisements
 Website E-mail
 Other electronic distribution
Community Outreach
 New Americans
 Jewish / Non-Jewish community groups
Maintain synagogue archives

THE ROLE OF THE EXECUTIVE DIRECTOR IN YOUR KEHILLAH

An executive director's role is a composite of many areas of responsibilities and diverse skills. No one person can fill all the roles that could be expected of an executive director today. This questionnaire is intended to help guide your search committee in prioritizing the roles as they apply to your *kehillah*.

Rank what you consider to be the congregational priority of each of the 12 roles below, from 1 to 12 [with 1 being "most important"; 12 being "least important"].
And then assist your committee in reaching a consensus.

The ED as an operations manager Priority ____ [1-12]
The ED establishes and oversees the many operations throughout the kehillah, as a main task.

The ED as a building manager Priority ____ [1-12]
The ED sees the role as building manager, including operations, scheduling and security, to be core duties.

The ED as a financial manager Priority ____ [1-12]
The ED is fully involved in all aspects of the congregation's finance, from computer reports to purchasing and investments.

The ED as a development leader Priority ____ [1-12]
The ED works to establish fiscal and volunteer development policies to assure the long-term operational health of the kehillah.

The ED as a team leader Priority ____ [1-12]
The ED sees the role of leading the office, building and support staffs as the main task.

The ED as a governance leader Priority ____ [1-12]
The ED helps create an operational structure for the kehillah and works collaboratively with staff and lay leaders.

The ED as a Board resource Priority ____ [1-12]
The ED ensures the Board (and committees) has information, staffs committees which fall in operational areas, and offers guidance on matters under deliberation.

The ED as a congregational motivator Priority ____ [1-12]
The ED serves as a "cheer leader" for the kehillah and its programming.

The ED as a face of the kehillah Priority ____ [1-12]
The ED regards positive interactions with members and potential members, as basic to the role.

The ED as team player and role model Priority ____ [1-12]
The ED understands the Jewish values which support kehillah operations and works with the clergy in planning and investing all areas with those values.

The ED as an educator Priority ____ [1-12]
The ED works with staff and lay leaders in the creation and execution of Shabbat, holiday and other programs.

The ED as a support in times of sorrow Priority ____ [1-12]
The ED takes an active role in cemetery operations as well as coordination of services needed by those who have had a death in the family.

SEARCHING FOR THE EXECUTIVE DIRECTOR: PRESENTING THE PROFESSIONAL PROFILE

Enhancing the search process' goal of attracting the highest caliber candidates, by means of presenting the congregation's visage in the format of a professional profile

A frequently overlooked aspect of the search and interview process, is the "presentation" of the position profile. While the Search Committee may well have developed a thorough concept of the new position and various aspects of responsibility and goals, through its various developmental stages, and have taken steps beyond simply listing the vacancy and compensation, and conveying those perceptions to potential candidates. But this is a task all too often left to chance.

The Search Committee would do well to balance the emphasis on compensation, with an effort to find the individual attracted by the unique opportunities presented by the congregation's programs, culture, mission and prospects. That is the purpose of the Professional Profile document.

This "mock up" for such a document isn't a "boiler plate," but is intended to trigger thought as to how the Search Committee might present the professional opportunity to experienced candidates who know that the position exists in a congregational context, and would need to know how the congregational leadership sees the "bigger picture". Certainly, no one knows your kehillah's personality, culture and expectations better than the synagogue leadership engaging in this exercise. Likely to run some three to four pages, many presentation formats might flow from this prototype, but the best one for your congregation will evolve from your own expectations, creativity and enthusiasm.

Before "going public, the sections illustrated in the attachment should be explored . . .

1. Telling the story photographically
2. The Executive Director position summary
3. The congregational overview
4. The Executive Director's major areas of responsibility
5. The candidate's minimum qualifications
6. The expected compensation and benefits
7. Your guidelines for applicants

The NAASE-USCJ Joint Placement Commission
Placement@NAASE.org Office@NAASE.org

PHOTO HERE

Congregation A B C

PHOTO HERE

PHOTO HERE

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PHOTO HERE

The Executive Director: A Professional Profile

PHOTO HERE

PHOTO HERE

*A few well-chosen photos that together tell your story
... a compelling visual portrait of who you are!!*

THE SEARCH PROCESS: GETTING STARTED

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Chairman, NAASE Placement Services

Dr. Ray Goldstein
Kehilla Relationship Team Leader

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Chairperson, NAASE Placement Services

Dr. Ray Goldstein
Kehilla Relationship Team Leader

SELECTING THE ELEMENTS OF THE CONTRACT WITH THE EXECUTIVE DIRECTOR

This booklet is intended primarily to serve as a guide of congregations who are entering into contract discussions with their about-to-be-hired Executive Director for a newly crafted full-time professional position.

While contracts vary greatly in format, depth, specificity, inclusion and compensation levels, a composite image emerges as to the main elements most often found in the long-term (multi-year) contracts studied for this survey. The reader is urged to view this aggregate “wish list” with great caution, as it represents no actual document nor any single individual contractual agreement . . . rather it is intended to trigger the shared thinking process of the congregational leadership about to engage in discussions with its new Executive Director, on the matter of which items to consider for inclusion in a compensation document. This booklet is offered solely as a stimulus for discussion and consideration of concepts, and may be a valuable addition to other available resources including the booklet *“What Is The Work Of The Executive Director?”* and the reprint *“Developing the Professional Contract with the Executive Director: A Guide to Congregational Practices”*.

Most congregations construct parallel but distinct documents - one spelling out responsibilities, authorities and review process, often referred to as a job description; and the other, being the actual formal professional contract format. The latter is sometimes as basic as a two page itemization, and at other times, results in a more complex agreement with numerous sections. In either case, clarity is paramount, to forestall any future misunderstandings, as is its accurate reflection of the understandings arrived out by the parties.

Congregations are urged to view such matters as resulting from enthusiastic discussions between parties with shared visions, goals and expectations for the synagogue’s future leadership.

Note: In addition to provisions and priorities discussed here, pertinent State and Federal regulations may impact on both the content and wording of such agreements, as well as granting or prohibiting certain rights and practices.

This booklet is not intended to be viewed as an offer of legal, accounting, tax or other such advice, though the reader is urged to seek appropriate counsel in such matters.

Here are the remunerative elements found most often in contracts studied by the NAASE Contracts Survey Committee:

- Term of the contract . . .
often two years initially, then three, then five and longer
- Salary . . .
at a level that reflects a realistic assessment of the costs of living in that region, and that allows the executive to live in, or close to, the community served by the congregation; with specified increases over the life of the contract; the level needs to reflect in some measure geographic location, congregation size, educational background, professional responsibilities and experience, staff size and existing contractual salaries, congregational financial status, and other “job market” factors
- Pension contribution . . .
often increasing over the life of the contract; sometimes jointly contributory (“matching”)
- Medical insurance coverage . . .
usually for the individual fully; may include the spouse/family fully as well, or an allowance for family premium
- Vacation . . .
most often 4 weeks or a month, though initially many are for two or three weeks; unused time usually not carried over to successive years
- Professional association dues/membership . . .
usually paid in full
- Convention(s) attendance / “professional growth” . . .
usually capped; sometimes allows for rollover of unused amounts with a cap or time limit
- Synagogue membership . . .
courtesy (limits voting or other privileges), usually for full family, often including religious school education / life-cycle events
- Severance . . .
most often found in multiple-year contracts or in renewed contracts; a formula such as a lump sum payment equivalent to anywhere from one week to one month’s salary for each full year completed, after the sixth year

Increasingly, executives have mentioned that their contracts include provisions such as . . .

- Life insurance coverage
- Disability insurance coverage
- Long-term care insurance coverage
- Dental/optical insurance coverage
- Travel reimbursement/allowance
- Moving/relocation expenses
- Educational (professional) expense reimbursement
- and other provisions designed to meet the unique needs of both individual executives and congregations alike

ADDITIONAL PLANNING RESOURCES

The USCJ Statement on Contract Standards

This extract from the USCJ's "Guide to Congregational Practices: A Guide to Contractual Relationships with Professional Staff" sets out the expectations and standards associated with entering into contracts with executive directors, clergy, and others on the congregation's professional team.

The Sample Contract Compendium

A collection of seven contracts currently in use in the field, varying in complexity, detail, length, duration, and inclusiveness of provisions. Some opt to include the job description in the body of the contract format, others set that into a parallel document.

The Job Description Compendium

For those congregations electing to structure the job description separately from the contract, this collection of actual job descriptions currently in use in the field may prove helpful. They are intentionally not designated by congregation size or other parameters to allow for maximum flexibility for the readers viewing them.

The NAASE Members Guide

When your new executive is announced, the ideal next step for him or her, is to "connect" with the professional network of over 300 colleagues across North America and receive access to the dynamic resources of this peer-to-peer network. This booklet highlights the programs, services and activities of NAASE.

**These and other planning material resources are available
by e-mail request to Office@NAASE.org**

**We are delighted to offer you a personal consultation for your Search Committee Chair,
President, Personnel Chair or other officer.**

Please contact us at Placement@NAASE.org or Office@NAASE.org

**THE USCJ - NAASE JOINT COMMISSION FOR
THE PLACEMENT OF EXECUTIVE DIRECTORS**

SYNERGY ED/A JOB FUNCTION CARDS

Use the Synergy cards found in the Appendix to answer the questions below, focusing on your specific responsibilities and authority for each functional area.

For Executive Directors/Administrators

Given your understanding of your priorities, functional responsibilities and required competencies, along with your level of authority:

- Would you describe yourself as an administrator or an executive director?
- How do you think your synagogue team would describe you?
- Does the role as defined best support the mission and needs of your congregation?
- Does it take advantage of your skills?

If you do not think your role best meets the needs of your synagogue:

- How would you reposition your priorities, functional responsibilities, and level of authority to achieve that goal?
- What resources, leadership support, and training do you need to move toward these new priorities?
- Would other roles change as a result of your shifting priorities?
- Would you and your colleagues' understanding of your role as an administrator or executive director change?

As you think about the ED Considerations graphic and your responsibilities:

- How would you describe your balance between the green administrator areas and yellow executive director areas?
- How might you find the balance you want?
- Is that balance consistent with what you believe synagogue leadership wants?

- If not, how might you talk with them to bring you needs closer together?

If you have a job description:

- Do you understand your priorities and what success looks like when you meet them?
- Does it help you understand the core skills you need?
- If it's not helpful or you don't have one, what do you think a job description should include?
- Who would you work with to draft one for your position?

Possible ways to sort the cards:

Who leads each of the areas described in the cards?

Rabbi
Executive Director
President
Educator
Lay leaders or volunteer
Nobody

Probes: Why is leadership structured this way? Is it working? Who decides who does what? Do you have the skills you need to lead the areas you're responsible for?

What role should you have for each of the areas described in the cards?

Leader or coleader
Provide input
No involvement

Probes: What gets in the way of this happening today? What attempts have been made to change? What were the outcomes? What are the benefits and drawbacks of such a change versus how it's done today? To what degree are you skilled and ready to accomplish each of these tasks?

How satisfied are you with your role in each of these areas?

Very satisfied
Somewhat satisfied
Not satisfied

Probes: Why or why not? Have you discussed your role? Can others offer ideas? How can you brainstorm to make the change?

For Synagogue Leaders

You will need a copy or sketch of your congregation's leadership organizational chart to consider the questions below.

Do you have a CEO or head of congregation role? If so, who are the leaders? How do you define the role and its responsibilities? Would others agree with your expectation of the role? What is the ED/A relationship to this role?

Does your formal chart reflect how decisions are made and the authority for them? Is there a difference between supervisory and reporting authority? Does the ED/A report to one person? Do you think this works effectively? Do you think the ED/A thinks so?

Do your staff and lay leadership know about the formal organization chart? Would they think it accurately reflects how decisions are made? If not, why? What is necessary to clarify authority and decisions within the lay and staff structure?

Possible ways to sort cards:

Who leads each of these areas today?

Rabbi
Executive Director
President
Educator
Lay leaders or volunteer
Nobody

Probes: Why is it structured this way? Does it work? Who decides what people do? Does everyone have the skills they need?

Who role should each have in the process?

Leader or co-leader
Provide input
No involvement

Probes: What gets in the way of this happening today? What attempts have been made to change? What were the outcomes? What are the benefits and drawbacks of such a change versus how it's done today? To what degree is the team skilled and ready to accomplish each of these tasks?



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How Do I Use These Cards

Think of these cards as conversation starters — a way to get synagogue lay and professional leadership teams talking about the executive director or administrator’s responsibility and authority today and what the future might look like.

Each of the 17 cards describe functional areas of responsibility that may fall under the purview of an executive director or administrator. Because they don’t cover all possible function areas, we’ve included a few blank cards for you to customize as you see fit.

Use these cards to consider whether there is clarity around the core functions and authority of your executive director or administrator. If there is, you’re doing great! If there isn’t, consider opportunities for further clarifying the roles, responsibilities, and authority.

Fold here

Fold here

How to Use the Cards

Consider using these cards with your lay and professional leadership team. Here are three suggestions to help you consider whether there is clarity around the roles, responsibilities, and authority associated with each of these core functions in your synagogue.

1. Card by card, review the functions and answer: Who leads this now? Why? Is it working? Does the leader have the necessary skills?
2. Card by card, review the functions and answer: Who should ideally lead or co-lead, give input, or not be involved in each area? What gets in the way of this happening today? What are the pros and cons of what is desired versus what is happening now?
3. As a team, organize the cards while identifying who currently leads and who ideally should lead these functions. Throughout the process, note and discuss where there is agreement.

UJA-Federation of New York cares for Jews everywhere and New Yorkers of all backgrounds, responds to crises close to home and far away, and shapes our Jewish future.



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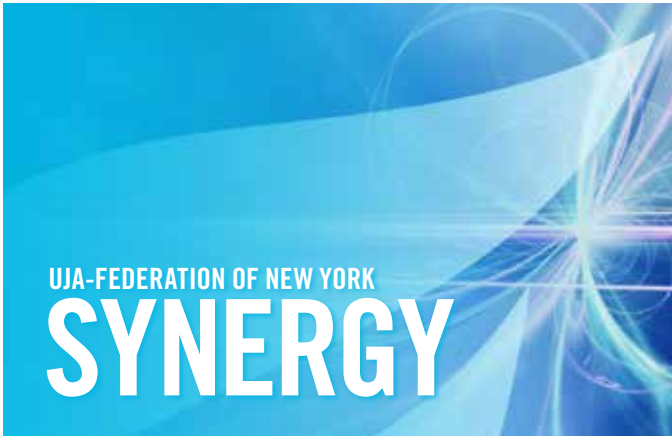
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FACILITIES MAINTENANCE AND MANAGEMENT

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DAY-TO-DAY FINANCIAL MANAGEMENT

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PROGRAM LOGISTICS AND MANAGEMENT, INCLUDING HHD PLANNING

 ujafedny.org    @ujafedny

PROGRAM CREATION

 ujafedny.org    @ujafedny

SYNAGOGUE TECHNOLOGY MANAGEMENT — PHONES, SOUND, SYSTEM, COMPUTERS, AND DATABASE

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COMMUNICATIONS MANAGEMENT — PHONES, SOUND, SYSTEM, COMPUTERS, AND DATABASE

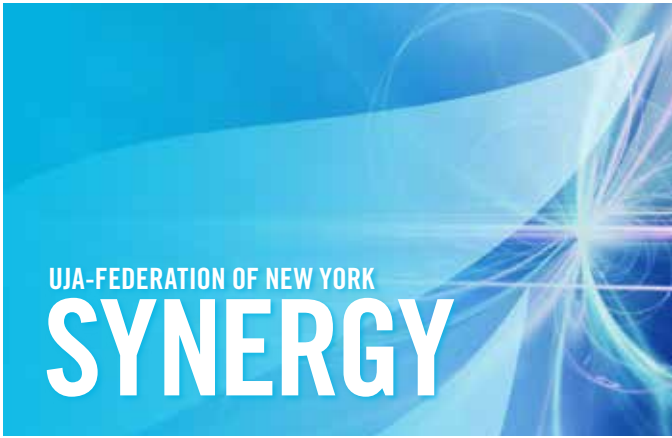
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CHURCH ADMINISTRATION: A BRIEF DISCUSSION OF THE TWO DISTINCT ROLES THAT EXIST IN CHURCHES

As in synagogues, you find a diversity of size, organizational structure, culture, staff, and lay roles among churches. Depending on the size of the congregation, two professional positions emerge as the most senior administrative role in a church, similar to the synagogue roles of administrator and executive director: the church business administrator (CBA) and the executive pastor (x-pastor). For synagogue leaders, studying these two roles may be helpful in exploring the right balance of core functions for the ED/A role in their congregation.

In conversations with church management leaders, it is clear that, as in the synagogue world, there is confusion over the responsibilities of the senior administrator in churches, even with the development of the CBA and x-pastor roles. At the same time, separating the two positions provides better transparency for church leadership and establishes expectations of the role and how success is measured.

The x-pastor role was developed in evangelical megachurches, but it has become more common in a broad base of larger churches over time.¹ In the simplest terms, the x-pastor appears to oversee the implementation of the vision of the church as largely directed by the lead pastor. The person must be a good listener, mature, and understand the difficulties of organizational relationships.²

Church management leaders spoke about the importance of senior pastors and pastors totally trusting the x-pastors, while giving direction and structure to the rest of the staff. Also important, and different from most synagogue ED/As, x-pastors are often required to have the pastoral skills necessary to stand in for the pastor, even if they are not ordained.

The church business administrator, on the other hand, is a limited role that does not require religious training. This position generally focuses on daily operations, financial reporting, and facilities management. The CBA is not engaged in the strategic work of the congregation, reporting to the x-pastor in a larger congregation or the lead pastor in a smaller one. As with under resourced synagogues, CBAs act as the jack of all trades in smaller churches, without the time or capacity to engage in developing the mission of the church or helping the lead pastor (except in an administrative role) bring the vision to fruition.³ As with synagogue ED/As, it appears that some CBAs struggle to find meaning and purpose in their work, preferring a broader and more strategic role.

These two church models do not perfectly align with the synagogue administrator or executive director models, but they raise important questions for synagogues to address. This is especially true when discussing the extent to which the ED/A is intimately engaged in the vision of the congregation and overall management and leadership.

As you read about the church roles below, you'll see there's much that you can translate into the synagogue world.

¹ As with larger synagogues, large churches are hiring more x-pastors with MBAs in addition to their ministerial training. Some Christian seminaries are experimenting with special certification or degree programs for emerging x-pastors.

² Phil Taylor suggests three common reasons for hiring the x-pastor role: 1. The lead pastor needs a right-hand man; 2. the church or board has identified a need for someone to run things more effectively behind the scenes; or 3. the church is looking to attract a particular leader by giving him or her an executive-level role and who may become the heir apparent. See pages 29–30, Taylor, Phil, *Defining the Executive Pastor Role*, Orlando, FL: Floodlight Press, 2015.

³ In our research, a few ED/As indicated they occasionally lead services on vacation weekends, teach religious texts, lead minyans, or conduct life cycle events in a quasi clergy role. Our research did not find instances where these tasks are a core function of the role.

Church business administrator role

- Small churches include this position.
- Focus is on day-to-day operations, finances, and building needs.
- Administration, facilities, and finance staff generally report to them, but program staff does not.
- May support strategic planning and vision as a resource, but unlikely to have a leadership role.
- Task oriented.
- Manages membership.
- Not necessarily part of the senior leadership team.
- Not required to have a religious education background.
- Competencies mostly around technical and basic interpersonal skills.
- Generally reports to the executive pastor, if there is one, or to the senior pastor.

Executive pastor role

- Often referred to as the COO or chief of staff.
- Charged with implementing the senior pastor's vision.
- Generally, supervises most of the staff.
- Responsible for church operations.
- Often has formal or informal seminary training, and may be asked to conduct services, preach, and conduct life cycle rituals or ceremonies.
- Engages and manages membership.
- May supervise the CBA, reporting to the senior pastor.
- Competencies focus on ability to work with the senior pastor, and strategically manage or delegate while also working collaboratively.

A leading voice in church management, Mike Bonem talks about the relational aspects of the executive pastor role. His advice is relevant to synagogues, and especially to congregations who are hiring business executives as the equivalent of an "executive pastor." Bonem reminds new executive pastors transitioning from business of the seven ideas that can help create a strong, lasting relationship.

The first three ideas shape our understanding of the role, and the last four focus on the vital relationships:

- Simplify any systems you implement.
- Narrow your focus to increase your impact.
- Expand your understanding of stewardship.
- Lead relationally.
- Stay tethered to the senior pastor.
- Redefine key boundaries.
- Keep God at the center.⁴

Church management experts emphasize the importance of reviewing the core functions of the senior administrative role and paying special attention whenever there is a senior pastor change. The role must adjust to the changes in mission, program, gifts, and strengths of the senior pastor, as well as growth trajectory and other factors.

Training and ongoing professional development is important for both the executive pastor and the church business administrator. Both the CBA and the x-pastor are provided ongoing professional support through the Church Network. This cross-denominational professional organization for churches offers membership categories for these two roles as well as for finance directors, facilities managers, and other administrative or professional positions. Its annual conference includes learning tracts for each role (as well as worship and governance tracts by denomination). Some executive pastors also participate in X-Pastor and the Leadership Network training, which focuses on organizational and management skills. This specialized training is not for CBAs.

For more information,⁵ see our bibliography and websites lists.

⁴ See Bonem, Mike, "From Business Exec to Executive Pastor," XPastor, May 5, 2017, <https://www.xpastor.org/new-xp/church-business/from-business-executive-to-executive-pastor>.

⁵ For job descriptions see Powers, Bruce P., ed. *Church Administration Handbook*. Nashville, TN: B&H Publishing Group, 2008, page 102.

FURTHER EXPLORING THE CHIEF OPERATING OFFICER ROLE

Titles do not define the ED/A role or the core functions of the role. This is true for the “executive director” in synagogues, where most use the title for senior administrators regardless of the functions, supervisory responsibilities, or authority associated with this role. It would be helpful if the senior administrator title provided clarity around the possible expectations of the role, and if sectors could find common language to describe existing roles. To some extent, churches have responded by creating two distinct roles: the church business administrator and the executive pastor (see Section 1B of the Appendix). And synagogues may move in that direction as well.

Also worth looking at closely is what the chief operating officer (COO) title connotes, because increasing numbers of nonprofits use this title, and synagogues refer to the COO role in ED/A job descriptions and in describing the ED/A role in survey answers and interviews. The COO, as used by synagogues and nonprofits, is potentially connected to the idea that the senior administrator position leads day-to-day operations, generally a senior member of the team supporting the CEO and board. It’s often responsible for enhancing the infrastructure, strengthening systems to improve efficiency, the quality and delivery of services, and preparing the institution for further growth.

As with the synagogue executive director and other titles, the COO title has many meanings and interpretations. In a seminal May 2006 *Harvard Business Review* article,⁶ “Second in Command: The Misunderstood Role of the Chief Operating Officer,” the authors describe their research into the corporate COO role, determining “the role shows real disparity in spans of control, decision rights, reporting structures, and the like.” They posit that key to understanding the role is its relationship to the CEO of that same company. Ultimately, they describe seven types of COOs, some of which don’t apply to the synagogue. However,

several COO definitions are consistent with the executive director/administrator role in the synagogue. For example, depending on the needs of the CEO (the president or senior rabbi), the COO may focus on implementing the CEO’s vision — along the lines of the executive pastor in a church — to make the CEO more effective and efficient or make major organizational changes.

As we look at other COO role definitions, a common thread is that the role supports the institution’s growth and strategic work in numerous ways while also focusing on internal operations. In *Riding Shotgun*, the authors indicate that a broad definition of the COO role is easy: “The COO is the second in command and has responsibility for the day-to-day operations of a business.”⁷

Others expand on this definition. For example, the Society for Human Resource Management defines the COO position as providing “the leadership, management and vision necessary to ensure that the company has the proper operational controls, administrative and reporting procedures, and people systems in place to effectively grow the organization and to ensure financial strength and operating efficiency.” (See https://www.shrm.org/resourcesandtools/tools-and-samples/job-descriptions/pages/cms_001166.aspx.)

A 2009 Bridgespan report *The Nonprofit Chief Operating Officer* reports on the nonprofit COO role, describing it as a “manager who is second in command to the ED, and/or reports to the ED and oversees operations and administration, and/or has the title COO.” At the same time, the nonprofit COO has widely varying roles with responsibilities that differ significantly based on organizational needs, culture, and priorities — just like the executive director/administrator role in synagogues.

⁶ Bennett, Nathan and Miles, Stephen A, “Second in Command: The Misunderstood Role of the Chief Operating Officer”, *Harvard Business Review* (May 2006).

⁷ See page 6, Bennett, Nathan, and Stephen A Miles, *Riding Shotgun: The Role of the COO*, Palo Alto, CA: Stanford University Press, 2017.

Bridgespan suggests three general models of nonprofit COOs:

The COO oversees all operational and administrative functions. In this model, the COO oversees the functions that support the programs but do not relate directly to participants, and other senior managers are responsible for the programs themselves. ...

The COO oversees all programs. In contrast to the first model, some COOs are responsible primarily for programs, while the ED, the chief financial officer, or another senior executive oversees the more administrative functions. ...

The COO oversees all internal functions. This third model is the broadest: The COO oversees everything internal, freeing up the ED to focus on external matters such as fundraising, public relations, and partnerships. Looking at nonprofit COO job descriptions, they're similar to some executive director job descriptions we reviewed for this report, a few included in the Appendix. For example, the COO of Project Renewal reports to both the president and CEO and sounds much like some executive director descriptions.⁸

It says, in part:

The successful candidate will be a mission focused, seasoned, strategic, and process-minded leader. ... Who is able to assess and build the infrastructure systems to deliver measurable, cost-effective results that make the agency's vision a reality. The COO will oversee all operations, quality assurance ... bring efficient and effective systems.

As with executive directors/administrators, mentoring and support, in addition to formal training, is critically important to the ongoing professional development of many nonprofit COOs.⁹

Some synagogue leaders are familiar and comfortable in the COO title, sensing that the description better fits the role of the executive director/administrator in their congregation. It reflects the fact the COO or ED/A role tends to focus inward, allowing the "CEO" rabbi/president to focus outward and reflecting authority and decision-making boundaries more clearly. As synagogue leaders continue to explore the role of the ED/A, the role of the COO in the nonprofit world may provide useful language and suggestions for best positioning the role and others for success.

⁸ See DRG Posting, July 2017, Project Renewal, Chief Operating Officer.

⁹ See The Bridgespan Group, "Nonprofit COOs: Where to Turn for Support," <https://www.bridgespan.org/insights/library/careers/coo-where-to-turn-for-support>.

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