



The National Association of Temple Administrators'

PRESENT -

**A GUIDE FOR
CONGREGATIONS
GOING INTO PLACEMENT
FOR A NEW
EXECUTIVE DIRECTOR**

OCTOBER 2008

Introduction:

The National Association of Temple Administrators (NATA) serves Reform Jewish congregations 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 pamphlet 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.

PLEASE NOTE: Neither the NATA office nor the placement committee is involved in making decisions about the hiring of any specific candidate for a specific job.

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 for profit and not for profit. They may have also received professional certification from NATA, which includes Senior Status or a Fellow in Temple Administration (FTA)¹. The goal of any placement process is to find the executive director best suited for the specific position. There is no “perfect” position for all applicants, and there is no applicant who is “perfect” for every position. Through the placement process, applicants and synagogues get to know one another in order to find a “match” that will be fulfilling and rewarding.

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

1. The congregational leadership should define the scope of management, leadership and governance responsibilities of the ED position before going into the search process. This should then lead to the development of an accurate 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.

¹ 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 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.

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.

The NATA management office is available to assist NATA members and URJ congregations in the placement process, and members are encouraged to consult with the NATA office as necessary. In addition, the NATA placement committee, made up of seasoned experienced executive directors, is a wonderful resource and can be contacted through the NATA management office.

The NATA Job Search List

NATA provides potential candidates with a list of open positions in congregations and institutions affiliated with the Reform Movement on its Website (WWW.NATANET.ORG). All regular members of NATA can access the website postings for free and receive, in addition, periodic email reminders and updates. Non-NATA member individuals 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 NATAOFFICE@NATANET.ORG, by phone at 1-800-966-6282 or by logging onto our website. The congregation will be asked to fill out an application form (available on line at www.natanet.org) and to verify that the current executive director, if there is one, is aware that the congregation is going into placement or beginning the placement process. After the NATA management office receives the completed application, the congregation will be contacted by someone from the placement committee to review the application with them and to answer questions. Once approved for posting, the new position is posted on NATA’s Web site in a secure section.

The job search list is updated periodically as changes occur, and members receive email notification of such updates. Interested applicants respond directly to the congregation.

The Search Process

- I. The congregational leadership needs to define the executive director’s scope of management, leadership and governance responsibilities.

Just as there are many different kinds of 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 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.

The leadership needs to consider the following:

1. 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 also an evolution in the nature of 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.
2. 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.
3. Who does the executive director supervise, and why? This question deals with the organizational structure of the synagogue.
4. Who are the executive director's indirect ("dotted line") supervisions, and why? This question deals with the day- to- day operations of the synagogue.
5. What are his or her direct and indirect responsibilities for: membership, development, communication, facilities, finances, education and programming, life cycle, 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.
6. 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.
7. What is 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.
8. 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. 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. NOTE: the placement 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:

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

In appointing members to the search committee, one member should be designated as the contact for the applicants throughout the process. This person will be responsible for regular communication with all applicants. The same person or a different person (the chair, usually) should be reporting regularly to the officers 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 of the following topics as part of this preliminary work:

1. The religious environment of the congregation (does it matter if the candidate isn't a Reform Jew?)
2. Vision and mission of the congregation
3. Congregation's strengths and weaknesses
4. Key challenges of the next year

5. The “ideal” applicant
6. Core competencies and key personal characteristics that are required, and the essential functions. Must this person have a financial background? Be able to multitask? Be able to communicate effectively in writing?
7. 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?
8. Will he or she attend board and executive committee meetings? Staff those meetings? Staff other committees?
9. Who the candidates should 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. 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 in its placement section.

A job description should include the following:

1. Title
2. Reporting structure
3. Job summary
4. Key responsibilities with specific duties (“Essential Functions”) such as financial management, and membership
5. Core competencies, including expectations of character attributes necessary for the position, such as strong team building and problem-solving skills
6. 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 pull together other materials 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

1. Go through the NATA placement process by filling out a placement form on line and submitting it. Review other locations for placing advertisements including local Jewish papers, national papers, web sites and search firms.
2. Any resume that comes in should receive an acknowledgement.
3. 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 a whole.
4. 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.
5. 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:
 - a. Feedback from their phone or initial face-to-face interview
 - b. Names and brief background of the individuals with whom they will be meeting during this second round

- c. Expectations of the committee during the next phase of the interview
- d. References—may not, at this point, include current employer
- e. 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?”)
- f. The timing of hiring (and candidate’s availability)
- g. 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.

- 6. 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.
- 7. 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 is 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 called 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:

- a. How long have you known the candidate, and in what capacity?
- b. What are the candidate's strengths and weaknesses?
- c. Has the candidate been successful in his or her current position?
- d. Given the opportunity, would you hire the candidate again, and for what position?
- e. What other information (which my prior questions did not elicit would be helpful to us)?
- f. 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.

8. At the additional conversation or face- to- face meetings, it is hoped that the search committee is able to 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, subject to speaking with the candidate's current employer as a final reference check. When a candidate is currently an executive director at another congregation, at this time it is likely that the search committee will speak with the senior rabbi and/or the president from the candidate's congregation.

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, signed by both parties. The parties may find it useful to look at the suggestions and guidelines of Guidelines for the Administrator-Congregational Relationships, the agreement between the URJ, CCAR and NATA (as adopted and amended in 1993). 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 nursery school at no charge
6. Moving allowance
7. Continuing education, including NATA membership
8. Four weeks of vacation
9. Disability leave 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 placement committee and the NATA office will continue to be available to you throughout the process.

Good luck!