

The Special Management Concerns Facing A Temple's First Director

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The Hypothesis

Having been the first executive director for two temples, I always suspected that the set of problems and concerns would be unique and different than in a temple where one director follows another. With no professional precedent, the first time director must address a host of temple management needs in a very different way than simply being a link in the evolution of that temple's professional growth.

A newly hired director to any temple may put the stamp of his or her personality on the definition of what an executive director is or isn't, does or doesn't do, but there an expectation already in place. The job description may vary but whoever preceded the new director created, in his or her tenure, some fundamental understanding of how the director functions.

A newly hired director to a temple might review the manner in which records are kept, and might suggest new approaches for filing documents. But the assumption would be that there *is* a design or intelligence behind the current filing system. Surely, one would not assume that it's an accident or a totally ad hoc affair. A temple's first director, however, cannot make such assumptions. The filing system might only suggest that certain past presidents, at some time or other, found some methods feasible while others, during their term, favored alternative measures. The only real assumption that can be made is that no one, over time, would have had this responsibility *as an executive director*. There might have been office managers, sometimes quite skilled, with abilities in filing, but no one who had a global sense of the temple that could take an overall view.

This was my experience. For the first time in the history of these particular congregations, the management and review of temple life itself - specifically with regard to the office, building, finances, administration and record keeping - would become the purview of a professional.

At least, this was my own best guess, and it explains why my first years at my temples were significantly different than my colleagues who followed other colleagues in their jobs.

This thesis will explore and research data to determine in what ways my hypothesis is correct or not.

Methodology

In order to gather data for my hypothesis, I sent a survey and cover letter (a reworked version of the hypothesis) to 60 congregations nationwide, targeting those that might be likely to have directors serving for the first time. These congregations had membership totals between 400-700.

The National Association of Temple Administrators, NATA, was able to provide me with a list of directors who joined NATA in the year 2000 *and* who accepted positions in that same year. Some of these directors, indeed, were not first time directors at their temples – they were listed correctly but were serving temples with a long history of professional development. There were, however, viable candidates for the survey, about half a dozen who were their temple’s first director but with very limited experience. All were solicited to gather information from every perspective.

The survey and introduction also was sent electronically through NATA-SCHMOOZE, an interactive Website for temple managers. From this method, there were phone calls, wonderful conversations, emails, and about 20 completed survey forms.

It should be noted that I made a decision regarding statistics in the presentation of the material. I did not think statistical paradigms were applicable. The particular methodologies used here focused on significant anecdotal information. So, for example,

to say that almost 100% of the responses identified the major role of a temple's first time director as an agent of change - though it would be correct - there was wide variance on *how* the director effects change and *what* changes specifically needed to be addressed. No statistic alone would show the reality behind the numbers. The overall samples were also too limiting, in a statistical sense, to be relevant. So it became apparent that it would be more accurate to rely on language to present the material than percentages in survey responses.

The survey itself encouraged personal observations and narrative and was *not* created to solicit quantifiable results.

I have stayed true to the totality of the responses by indicating all of the *kinds* of response, from those that most people shared to individual comments, even if they did not fit the consensus. In this way, the material reflects the overall opinion of directors on each subject from their own perspective and situation.

The survey appears in the Appendix.

Thesis

Directors in the field universally agree that one of the central issues for them, as their temple's first administrator, is the recognition that the leadership has no experience in giving up some of their control to a professional, other than the rabbi and, to a lesser extent, the cantor. Some congregations are more willing than others to relinquish control.

It is a common challenge to new directors. It's apparent that some directors come into a temple that is poorly organized, or, as some directors put it, "barely organized," and are hired to "fix" the problems, while at the same time, they have trouble wrestling the problem from those who owned it before.

"The delegator must 'let go' and allow the other person the right to do the job consistent with that person's own skills, personality, style and experience."¹ To be given the job, then watched over, regulated and directed by a leadership who must control everything to be sure it's done exactly as they would, is an equation for disaster. While it's true that the temple has no experience or history with what a new and first-time director does, and

therefore remains unconvinced of the director's ability to succeed until he or she actually does, it logically needs to surrender control before it's really comfortable doing so.

Some directors responded that they came into their temples with experience and credibility, perhaps from across town, or across the country, so that leadership was more willing to "let me deal with the leaky roof" and other issues. For most directors, the responses indicated that confidence building is an evolutionary process over a few years, despite their experience or credentials.

Some congregations distinguish between operations and long-term planning – they are willing to let their new director take charge immediately with building issues but do not regard the director as a full partner in the future planning of the temple. This may show itself by officers not inviting the director to an executive committee meeting, or by their excluding the director in some top-level meetings. Directors thought this was not always intentional; they simply have not been used to including professional staff. So it became necessary for new directors to educate their congregations and assure them that their hesitancy was normal but that it needed to change.

Some directors reported that one of their mandates was dealing with long term personnel issues, which the leadership was hesitant to resolve. For example, more than a few directors told the classic tale of needing to deal with a "sacred cow" in the temple office, usually an employee who had worked for the temple many years and whom everyone respected though they could not confront him or her with criticism or evaluation. This is

usually further complicated by the actual need by the director to foster a relationship with this person, as the sole proprietor of office and temple knowledge – she (and it’s generally a “she”) knows where everything is and how everything is done!

Almost every new director who was their temple’s first reported that there were not adequate personnel files in place. In fact, they said, temples left personnel issues alone and generally refused to deal with them. In many cases, it was one of the reasons temples hired executive directors. The reasons for this included lack of expertise and volunteer time – human resource issues were dealt with in the past by a temple president and the rabbi, admittedly, not necessarily in a consistent manner from person to person, or year to year.

Temples, it seems, deal with maintenance coverage for an oneg on a much more formal basis than personnel issues! People issues are notoriously more confrontational and emotionally charged than how the social hall is to be set for Shabbat services. Directors in the field needed to deal with these issues in their first few months on the job.

A few directors responded that they were accepted more readily because that had had some relationship with the temple prior to serving as the new director; some were, in fact, active leaders in these temples.

The survey attempted to ask directors, in light of how they were accepted by their temples, what the organizational culture was regarding change. Was leadership used to

change? Was the temple staff comfortable with change? Did the leadership realize that their new director was an agent for change? How did other staff perceive the new director?

There was agreement among directors in the field that not only does a temple's first director educate the congregation as to what a director does, he or she also must educate the congregation as to what a director does not do. It was apparent that a new director needs to enlighten the temple board that change is good for the congregation. It is also, as many conversations attested to, bothersome and tricky, but in the end, it creates a professional canopy under which congregational goals would be met both productively and with accountability.

“People resist change for two reasons. Change is often perceived to be a threat, and detailed knowledge about the change is frequently not made available. Both of these reasons fuel uncertainties about the future.”²

Survey responses supported the idea that it's important to identify the need for change and to further delineate whom is affected by the change. Most agree that to be successful, it's necessary to communicate the need for change to everyone in the temple, in appropriate ways. Past presidents should be included in communications on major changes, and certainly the temple board needs to know what the director is planning. Written overall goals are important. Newsletter articles about growth and change are also

useful. Directors reported that the changes needed to be monitored and adjusted, as required.

The survey responses suggested that not all temple boards were accustomed to this kind of honest, regular communication from professionals. While the director might favor more rather than less, some boards were not comfortable questioning plans, or acting as an overseer, or simply not used to professional communications on a regular basis.

While no one suggested that it was the director's job to fix what wasn't broken, it was part of the job description, for many in the field, to improve on success and to effect change if warranted. One needed to review *all* procedures, systems, operations, even leadership assumptions, because no one prior, with accountability, did so. The new director needed the board to expand and shape the definition of the job.

When asked what these temple directors do that most other directors don't, the answer was, commonly, that they had to create a definition of an executive director, not in a vacuum, but in concert with their temple boards. Both sets of expectations needed to be forged from some reality they would share to create a true definition. This would not happen once, but over time. Whatever the director or temple thought the job meant, it seems from the data to mean something different in the first few weeks from what it means after six months or a year. It develops as directors wage big battles over small issues, and a series of important little battles over big issues.

When asked what they did differently, in their first few weeks and months, from directors who followed other directors, they answered: there was great energy spent reinventing the basics of temple operations. Rental agreements had to be rewritten, since they were hardly applicable in a new building expansion! Many directors reported that their temples had no policy manuals, so vacation schedules or sick leave guidelines were not consistent throughout the building. Some temples were living with problems that could be easily resolved but no one really had ever tried. The vendors in the temple had to be evaluated yesterday. A variety of other ills existed and awaited a director's solution.

One director reported that the temple's accounts payable file was chronological – so, to determine the status of an invoice, one needed to know the date it was paid. Simply making it alphabetical by vendor solved a longstanding problem.

It is not my intention to demean the efforts and dedication of a temple's leadership. It is my intention to assert strongly that professionalism in the temple is an indisputable virtue, which makes possible excellence in our collective ability to create temples that act as *successful* places of worship, assembly and prayer.

Directors responded that there was a need to empathize with everyone's perspective in the temple. "Listening" was prioritized often by new directors. Many suggested that a temple's first director need not always have a solution. Merely to acknowledge the problem is a first step. One director said, "When asked about a copier, I said, yes, I hear you, it's very slow. We'll get to it!" No immediate solution was offered, but there was a

willingness to recognize the problem. Another director said, "You don't have to agree or disagree. I was famous for saying, 'step by step.'"

Directors should encourage their boards to question and doubt, to guide them in developing a job description for their executive director that reflects their combined character and expectation. Going through the motions is simply not professional. As Peter Drucker said, in his landmark book, Management, "An effective board asks inconvenient questions. An effective board insists on being informed before the event - this is its legal responsibility. An effective board will not unquestionably accept the recommendation of top management, but will want to know why. An effective board insists on being effective." ³

The new director brings a fresh perspective to the temple and the board needs to understand it, if not support it, initially. In my own case, to help the board help me develop my focus and to determine what they wanted me to spend time on, and what they wanted me not to waste time on, I kept a weekly log of exactly what I did at the temple. I attach it, in the Appendix, to show at least one instrument that can be used to sensitize boards to the real world of the director as, together, the job is defined. I asked them, from their viewing this log, exactly what they thought I should be doing that I wasn't, and what they thought I should stop doing. It was a springboard for dialogue.

Some directors noted that "slow is better than fast." As Geoffrey M. Bellman, in his book, The Quest for Staff Leadership, says, "Your need to perform is outrunning your

knowledge of the organization. People working around you are going to see quick action as precipitous. You are ignorant. So find out what's going on before you begin to change things."⁴ Directors cautioned patience, avoiding early wars.

While the director needs to be able to build consensus, being decisive is also important. As the agent for temple change, involvement by others is crucial. "...an important means for overcoming resistance to change is to involve those who will be affected by the change in the decision to make the change."⁵ While not always possible, directors feel it's desirable. While it may be true that part of the job description for *any* director includes his or her role as an agent for change, the job description for a temple's first director is all about managing temple change. While a temple may be used to tacitly supporting change, with its new director, it will learn to proactively initiate change.

Some responses did acknowledge that professionals, from a volunteer's point of view, usurp leadership's participation, but that it was "the lesser of two evils." Better to have someone paid to do the job than do the job myself, but it is more virtuous to do the job myself. Directors needed to recognize this phenomenon and develop, with their temples, a sense of trust. Working as partners means that no one usurps the other. The reality of temple management is that the director rarely works in a vacuum. Leadership, for both, continues to be traditionally defined as the art and science of *getting things done* through the *willing* efforts of others. Directors *want* to help their leadership succeed; leadership, in their own self-interest, wants its directors to succeed.

Many temples talk about the old days when volunteers did everything. The truth is, as survey responses show, it is a different world for volunteers today than even ten years ago. There is a value to Jews coming together to work for their temple, but increasingly more of our congregants are working at two jobs with little time to volunteer *unless* that involvement is meaningful. Professionals do more of the temple work than ever before. The larger question focused on the professionalization of temples. Most people in the survey agreed that the old days were not at all that glorious and that today's modern, well-run temples are more successful houses of prayer, worship and assembly.

A legend in temple management, Irving Katz, put it best: temples, he said, needed to “rely upon research, tested experience, and the application of scientific method.”⁶

Modern temple managers encourage self-evaluation. Directors in the survey agreed. They felt strongly that diligent adherence to this principle is exactly what distinguishes them as contemporary managers. As their temples' first directors, they are pioneers and their temples are the beneficiaries of their professional legacy. It is the metaphoric enactment of our Jewish value of *dor l'dor*, from generation to generation, a process of continuity, making it better for those that follow.

Footnotes and Bibliography

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