The Ever-Evolving Role of the Executive Director
Editor’s Message

Susan Zemsky, Executive Director
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As professionals in our field we are expected to be knowledgeable and nimble in all the technical skills that keep things running smoothly. Membership and accounting software, internet accessibility, telephone and heating systems, plumbing, electricity, landscaping, institutional archives and more all fall under our purview. While technical work is not simple or easy, the tasks are known and expertise and answers are readily available. This technical work, where the challenges are clearly defined, takes up a healthy portion of our day.

Then there is the other kind of work, clearly distinguished from the technical, which is labeled adaptive work. In these tasks the issues are more difficult to define. Those involved must take leadership roles and meet the challenge of taking a new view on the issues and collectively coming up with answers to the problems at hand.

Each of the articles in this issue of the NATA Journal provides insight through the author’s lens on adaptive challenges. Our idea for this Journal was to set forth and explore the information and possibilities that adaptive leadership can bring to the field of temple administration. It is our hope this will be useful in moving our communities forward, developing perspective, and meeting the needs of our congregations. The corollary to adaptive leadership is adaptive change, often the goal we aspire to reach when facing the challenges of synagogues today.

I would like to give a huge shout of gratitude to both the editors and the contributors to this issue of the NATA Journal. Each submission gives us insight into how executive directors are leading and adapting in new and different ways. I would like to thank the NATA Board and lastly the leaders of Temple Shalom of Chevy Chase Maryland for allowing me the honor of editing this Journal and participating in NATA at this level.

—Susan Zemsky has over 25 years of experience in Jewish congregational and communal leadership in the metropolitan Washington, DC area. She is currently in her 15th year serving as Executive Director of Temple Shalom in Chevy Chase, Maryland.

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President’s Message

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“You need only to look at affiliation patterns for liberal religious movements, including the Reform movement, and trends in the Jewish world, to understand the importance of adaptive leadership. When the world is changing and what has always worked no longer does, when there is no solution, it is adaptive leadership that is needed. An adaptive leader pushes us to alter long held beliefs, values, and even behavior, and recognizes that everyone must work together towards a shared vision.

In The Practice of Adaptive Leadership by Ronald Heifetz, Alexander Grashow, and Marty Linksy, adaptive leadership is defined as “the practice of mobilizing people to tackle tough challenges and thrive.” It requires evaluating values, purpose and process, and seeks to build on the past instead of disassociating from it. Adaptive leadership occurs through experimentation, so one must be willing to fail. It takes time, and it is change that enables an organization to thrive. Adaptive leadership involves observing events and patterns, interpreting what you are observing and intervening based on the observations and interpretations.

This edition of the NATA Journal will focus on the ever-evolving role of the executive director in shepherding change. It will help us to think about our role in the adaptive leadership process, and how we engage our members, lay leaders and the rest of the professional team in the change process.

Thank you to Susan Zemsky, editor of the Journal, the editorial board and the writers, for all of their work, and for reminding us that if we want to meet the future head on, we cannot maintain the status quo, but instead, we must all embrace change and work to together to find new possibilities.

—Abigail Goldberg Spiegel has been Executive Director since the spring of 2004, having joined the Leo Baeck Temple staff as Program Director, in September 2002. She is responsible for the daily management of the temple’s operations and facilities. She serves as an ex-officio member of the Temple Board and Executive Committee and she staffs various temple committees including the Membership Committee, Finance Committee, Budget Committee, Endowment Committee, Communications, and the House and Grounds Committee. Abigail is a graduate of Mount Holyoke College. She is currently President of the National Association for Temple Administration (NATA), having served as a member of the NATA National Board, and Vice President, overseeing Education. She is also a Past President of the Professional Association of Temple Administrators (PATA). Married to Adam Spiegel, they have four children, Sydney, Maxwell, Sascha, and Harry.

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For proponents of adaptive leadership, leadership is a practice, not a position.

Adaptive leadership focuses on leadership as a practice to be used in situations without known solutions.

Ronald Heifetz and his colleagues argue that adaptive leadership is a practice not a theory, defining it as the “practice of mobilizing people to tackle tough challenges and thrive” (Heifetz, et al., 2009, p. 14). It is a “distributed leadership” model, which means leadership can be displayed across an organization, and not only by those in senior positions or management roles.

Heifetz et al view leadership and management as distinct but important behaviors that complement each other as part of a broader system of action. Management (authority) is best used for technical challenges, problems – routine and complex – where the solution can be found provided you have access to people with the appropriate expertise. Management is about coping with complexity, while leadership is about coping with adaptive challenges that require adaptive change.

Adaptive challenges are those where there is “a gap between aspirations and operational capacity that cannot be closed by the expertise and procedures currently in place” (Creelman, 2009, p. 1), they are systemic and have no ready answers. Adaptive change is uncomfortable; it challenges our most deeply held beliefs and suggests that deeply held values are losing relevance, bringing to the surface legitimate but competing perspectives or commitments. This means that adaptive challenges require a different form of leadership behavior: adaptive leaders do not provide the answers (and do not equate leadership with expertise) and accept that a degree of disequilibrium is needed to sustain adaptive change (rather than minimizing conflict and discomfort).
Core to adaptive work are three activities:

1. Observing events and patterns, taking in this information as data without forming judgements or making assumptions about the data’s meaning;

2. Tentatively interpreting observations by developing multiple hypotheses about what is really going on, and at the same time, recognizing that hypotheses are simply that – hypotheses; and

3. Designing interventions based on your observations and interpretations in the service of making progress on the adaptive challenge. (Heifetz, et al., 2009)

The Practice of Adaptive Leadership: Tools and Tactics for Changing Your Organization and the World (Heifetz, et al., 2009) was published as a “field guide” for learning and developing adaptive leadership skills. The authors suggest that “practicing adaptive leadership is difficult on the one hand and profoundly meaningful on the other,” while warning that “it is not something you should enter into casually” (Heifetz, et al., 2009, p. 41). “Leadership, when seen in this light, requires a learning strategy …. The adaptive demands of our time require leaders who take responsibility without waiting for revelation or request. One can lead with no more than a question in hand.” (Heifetz & Laurie, 2011, p. 78).

**Criticisms and Challenges**

Adaptive leadership has been criticized for failing to conform to traditional views of “the leader,” with suggestions that it would be better described as facilitation or catalyzing rather than “leading” (McCrimmon, n.d.). McCrimmon (n.d.) also argues that not all leadership occurs in the context of a problem; that leadership can occur without leaders and followers necessarily working together to solve a problem (i.e. action taken by one person can influence others); and that change can sometimes be easily made without confronting an adaptive challenge.

The disconnect between what has come to be expected of a leadership theory versus the principles adaptive leadership promotes appears to arise from a failure to appreciate that Heifetz is not advocating the use of adaptive leadership at all times and is instead offering a set of tools and principles that can be applied to work through specific challenges and periods of change.

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**Further Reading**


“I know we’re a synagogue, but we’re a business too.”

How often have we temple executive directors heard this statement from volunteers or lay leaders? We’ve even said it occasionally ourselves. It’s true – and yet ...

Over my 20+ years as an executive director I have often referred temple presidents and board members to URJ materials that describe the differences between being in congregational leadership and running a business. However, there are fewer such guides specifically for temple executive directors. We hail from a wide range of prior professional experience, including from the corporate sector, so it might be helpful to look more closely at some of the differences in the ways we executive directors lead our congregations compared to how we would lead a business or a social service non-profit.

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, personnel issues, congregant complaints, or leadership limitations, 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, but unlike in a corporate or business setting, our success cannot be measured by a bottom line or the invention of a new, improved widget. In fact, there might be times when, in pursuance of our mission, we must act counter to a conventional business approach.

And yet ... we still have to craft reasonable and actionable budgets. We still have to direct and mentor staff members and maintain over-used and often inadequate facilities. We need to oversee complex programmatic schedules for departments that compete with each other for space, publicity, and credit. So, what are a few of the ways in which we can incorporate our fundamental Jewish values and ethics in our day-to-day management?
My primary principle for setting a tone and model for synagogue leadership is Derech Eretz. Teachers of mine have translated this as “doing what it takes to make others feel respected.” Note that the emphasis is on “others.” If each of us is created in the image of God, we are required to act in ways that uphold the honor and dignity of all those around us, regardless of job status or finances.

Sensitivity to minhag – the traditions and customary practices of each of our synagogues – is vital when seeking to affect change or to address a conflict. As an Interim Executive Director, the phrase I hear more than anything else is, “That’s the way we always do it.” The statement makes me crazy but, in fact, it’s a reflection of comfort and security. As synagogues in the 21st century face new realities in technology, staffing, family structure, communications, and financial limitations, the “way we’ve always done” something becomes a serious obstacle to adapting. As we guide our congregations through these changes, we need to consider how the ways of the past can be reshaped while reassuring veteran members, lay leaders, and staff that their concerns and fears are being heard.

Tzedek, tzedek – fairness and accountability are hallmarks of a holy community. Temples have a tendency to become cliquey, exclusive groupings based on money, or history at the synagogue, or membership on the board or committees. Executive directors are human too, and we certainly have our favorites among our members and staff, but how we ensure that favoritism does not prejudice our judgment is a key component of acting justly and with thoughtful intentionality. Especially when our temples are seeking solutions to financial strictures, the director’s focus on equitable and creative treatment is a valuable safeguard against perceived bias or discrimination.

Corporate CEO’s and even executive directors of many non-profit organizations appear to have far more freedom in their actions. They are more clearly the “bosses.” They often bring in their own “teams” when they first arrive at their positions. The organizational changes they choose to make most likely are based on analyses of what will benefit the shareholders or the profit margin the most. None of that is true for a synagogue director. With our commitment to Jewish values, we are expected to lead our congregations and face the challenges of changing times without the power and authority of many business heads. And yet ... applying the framework of our Judaism to our day-to-day work can give us a far greater sense of our humanity, our integrity and ultimately our value to the continuity and strength of the Jewish people.

Esther Herst has been a synagogue executive director for more than 20 years. For the past six years, she has been serving as a traveling Interim Executive Director, providing synagogues in transition or facing crises with support and guidance as they seek new executive leadership. Currently she is finishing a nine month placement at Temple Beth Sholom in Santa Ana, CA. Previously, she has been Interim ED for The Brooklyn Heights Synagogue, Temple Chai, Temple Emanuel of South Hills, Temple Shaaray Tefila, and North Shore Congregation Israel. Esther’s home-base is in Seattle where she spends whatever time she has between "gigs."

Synagogues interested in learning more about her services can contact the NATA office.
Change: The Central Challenge of the Adaptive Leadership Framework

Dr. Max Klau, Chief Program Officer
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According to adaptive leadership, change itself is the central challenge. Over the course of time, individuals or organizations encounter challenges, and then engage in a process of experimentation and innovation in a quest to address those challenges. If they are successful, they are – for a while at least – successful and highly adapted to the environment in which they are immersed. Over time, however, the context changes, and systems, norms, habits, and beliefs that may once have been productive eventually become problematic in the new context. From this perspective, the challenge is to find a way to get individuals or systems to stop mindlessly repeating well-established but unproductive patterns and begin experimenting to develop new approaches that will allow them to thrive in the new context.

In these circumstances, the status quo may not be benefitting the powerful at all. Imagine a temple community struggling to adapt to a world in which fewer individuals identify as religious or join religious institutions. The fundamental problem here is not that the “have nots” are being treated unfairly by the “haves.” It’s also not a simple matter of needing to empower individuals to create change. Often, it’s not at all clear exactly what change needs to occur to adapt to a transformed context and environment! From this perspective, the challenge is that what worked in the past no longer works in the present, and the only path forward is to fundamentally question everything in an effort to figure out a new way of being in the world.

There are also a great many circumstances in which this type of change is indeed the central challenge that must be addressed, and adaptive leadership has proven useful in giving people a way to think about and address these challenges.

The Adaptive Leadership Perspective

From the perspective of Adaptive Leadership, two things matter above all else: Diagnosing reality, and crafting “interventions” that regulate the temperature of the system.

The foundational skill of adaptive leadership is diagnosing reality. The great strength and contribution of Adaptive Leadership is that it offers a sophisticated theoretical framework for thinking about the work of change. It is grounded in the following two key theoretical distinctions:

1) We must distinguish between technical and adaptive challenges
A challenge is technical if we clearly understand the nature of the problem and already have the tools, skills, or expertise required to address it. An adaptive challenge is defined by the fact that we don’t fully understand the nature of the problem, and our current repertoire of knowledge and skills is not sufficient to address the problem. To effectively address these problems, we must transform deeply held beliefs, norms, values, or habits.

2) We must distinguish between authority and leadership
Authority is a formal position of power (clergy, executive director, board president, etc.). Leadership is an activity (not role or person); it is an attempt to mobilize a group to address an adaptive challenge in order to thrive in the current context. Anyone in a system can attempt to exercise leadership.

According to the adaptive leadership framework, a key task involves using these theoretical distinctions to diagnose the nature of the current reality. When we think about our work, what do we see as technical challenges and what are adaptive? If we are in positions of authority, how might we effectively exercise
leadership from our place in the system? If we do not have authority, how might we exercise leadership from our place in the system? This kind of diagnostic practice is immensely important in the adaptive leadership framework.

The adaptive leadership approach is psychological: What are the loyalties of everyone in the system? If things were to change, what losses (material or psychological) would different stakeholders experience? While raw power is surely a consideration, the adaptive leadership model emphasizes the uniquely personal meaning of change for individuals in the system.

**The Adaptive Leadership Perspective: Purpose, and Self as System**

Adaptive Leadership places great importance on developing a clear sense of purpose. One must connect with one’s deepest motivations for wanting to create change. In the absence of a clear sense of purpose, we may be blown off course by events around us, or we may simply give up the work when the disequilibrium in the systems gets too high. Also, it is crucial that those seeking to exercise adaptive leadership learn how to understand the “self as system”; our inner world is every bit as complex and multidimensional as the outer world we are trying to change. In this framework, we must learn to both see and then effectively manage our own powerful hungers, like the need to be liked, or seen as “good,” or to always be in control. We must understand and manage our own deepest loyalties that may lead us to agree with one faction in the system or disparage another faction. We must constantly challenge and diagnose our own understanding of reality, lest we become yet another player in the system blindly contributing to processes that serve to perpetuate a maladaptive status quo. In the absence of this inner work, we may find ourselves mindlessly reacting to forces at work in the system in ways that undermine our purpose.

**Framing “The Work of Creating Change”**

- Distinguish technical from adaptive challenges
- Distinguish leadership from authority
- Diagnose reality through surfacing conflicting perspectives and assumptions
- Create holding spaces
- Disturb the system via creative interventions
- Regulate the temperature
- Run experiments

**Adaptive Leadership: Potential Blind Spots**

- Disturbing the system in itself may become viewed as “the work”
- Insufficient focus on relationship building and power mapping
- Overemphasis on diagnosis
- Overemphasis on being with discomfort and uncertainty can lead to inaction
- Overemphasis on purpose vs. story
- Overemphasis on change vs. power critique
- Insufficient focus on narrative

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Dr. Max Klau currently serves as the Chief Program Officer at the New Politics Leadership Academy in Boston, MA. He is an alumnus of four Jewish service programs, and received his Doctorate in Education, with a focus on adaptive leadership, from the Harvard Graduate School of Education in 2005. His first book, Race and Social Change: A Quest, A Study, A Call to Action was recently published by Jossey Bass.
Committee Work as an Administrator

Janet Lee, Temple Administrator
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Most small to midsize congregations rely heavily on committee work to support the Temple’s infrastructure, particularly annual programming, social events, facility maintenance and strategic fund raising.

At my synagogue, this has been both a blessing and a challenge. Committees are made up of volunteers, some familiar with task-oriented situations and others who I would categorize as “idea” people, who think big, but have very little sense of how to go about making their big ideas happen. The latter is what makes committee work challenging for most temple administrators. When dealing with a committee comprised of “idea” people, the implementation of an idea can be convoluted, poorly conceptualized and ultimately rely heavily on the temple administrator. After many years, I have found the most effective way to alleviate this situation is to be proactive with committee chairs. Don’t wait until after a committee has met to find out what decisions have been made or assume that all the details are being handled or have even been discussed. When working with committees, I have created a systematic approach to ensure I am working with a committee and not for the committee to facilitate an event, program or fundraising campaign.

1. Preliminary Meeting
It is important to meet with the committee chair or chairs prior to having a full committee meeting. Depending on the size of a committee, having thoughtful, two-way conversations can be difficult. Meeting with the chair first allows you to learn more about their goals, what they hope to accomplish and help them to identify key congregants who might be good additions to the committee. It is also a key time to review the budget, explain procedures around spending and receiving money and set guidelines on what type of support the administrator or office staff will be able to provide.

2. Create a Time Line
Task-oriented committee work should be linear and having too many meetings can be frustrating for committee members and time consuming for everyone involved. Best case scenario, you are meeting with the chair(s) three to four months prior to a planned event. The first full committee meeting should determine the details of the event (date, time, place) and identify all
the key “tasks” that need to be completed. The second meeting, four to six weeks before the event takes place, should be used as a check in: how is each committee member progressing on their task and what obstacles are they facing? This is the best time to trouble shoot and if necessary form a sub-committee to meet separately, if one task proves challenging. The final committee meeting should be one week prior to the event for last minute tasks and a timeline for the event itself.

3. Defining Your Role
It is helpful to attend the first committee meeting, but not subsequent meetings. Otherwise, you may find yourself entrenched in every aspect of the event. Stress the importance to the chair of having an agenda for each meeting, and request a chance to review the agenda prior to the full committee meeting. This will give you the opportunity to point out details that may have been missed. For example, you see “poster design” on the agenda – so you might then inquire on how they plan to get those posters hung, where they are going to go and how many do they plan to make? Helping to identify these small details will alleviate last minute stress for both the chairs and the office. This is particularly important for first-time chairs.

4. Identify the Key Tasks
For a committee to be successful, tasks must be assigned and clearly stated at the very beginning, otherwise you will hear that all too familiar phrase, “I don’t know who was taking care of that piece, do you think someone in the office can do it?” Once the date, time, general idea of an event and the committee members have been determined, it is fairly easy to identify what tasks need to be completed six weeks out, three weeks out, and then the final week. For example, PR and advertising typically will start six to eight weeks out, purchasing of materials four to six weeks, tracking RSVPs two to three weeks out, staffing of the event (set up, clean up etc.) two weeks out. Encourage chairs to overstaff the “day of tasks,” as inevitably committee members will have other obligations, people get sick, children get sick, etc. Having back-up volunteers is always helpful.

5. Agree to One Committee Liaison
Although typically the chair will be your primary contact for the committee, it may be that they would like to delegate that to a committee member. Either way, try to encourage only one point of contact with the committee. Otherwise you may find yourself having the same conversation with different committee members and find yourself essentially becoming a pseudo-chair of the event.

6. Insist on a Wrap Up Meeting One Week After the Event
Whether this was a one-time event, or an annual event, it is very important to review what went well and what could have gone better. In small congregations, it is not unusual for the same congregants to be involved in several different committees. Each event is a learning opportunity for both you and the committee, so identifying key successes as well as failures will help for the next event.

Committee work is a vital part of congregational life. It is the administrator’s job to help support these committees. It is not the job of the administrator to implement a program or event for the committee. Watch for statements like “we should really do this” or “wouldn’t it be great if we did that,” as the “we” is undefined. At that initial meeting, be prepared to question how they see the event unfolding, ask specific questions about event publicity, who will be making the posters, updating social media and doing the schlep work like stuffing a mailing or going to the grocery store. The more proactive you are with the chair and the committee members, the more likely tasks will be assigned and not ultimately fall on the Administrator.

Janet Lee is Temple Administrator of Hevreh of Southern Berkshire. She has been with Hevreh since January 2011. Before becoming Hevreh’s Temple Administrator, Janet, her husband Tim and two daughters, Alison and Ruthie, joined Hevreh in 2003 after moving to the Berkshires from Madison, WI. Both daughters were confirmed from Hevreh and are now pursuing college degrees in Brooklyn, NY and Amherst, MA.

Janet has a background in accounting, general operations and management. She is responsible for the day-to-day operations at Hevreh, oversees custodial staff and handles all things Hevreh. She is a member of MATSA (the Massachusetts Association of Temple and Synagogue Administrators). When not at Hevreh, Janet can often be seen walking through Great Barrington with her lovable Sheltie, Milo.
For many years, when asked what I did as a synagogue executive director, I described myself as a “transition maven.” In my first position at a Reform synagogue, I was tested for two years by an environment that had few working systems for membership or development, as well as a leadership war between the board and the senior rabbi. During my second stint – 12 years as an executive director at another Reform congregation – I was trusted to oversee operations while the rabbi took a part-time national position, and later to transition a new rabbi into the community. At my third position at a Conservative shul, there was no senior rabbi present for two of the five years I was there, and while the congregation experienced the agony of a long search and then the acceptance of a new rabbi, I worked with the associate rabbi to keep strategies moving forward. In my present position at a Reform congregation, I have had to learn to use my strengths behind the scenes in partnership with a rabbi who built a growing, thriving congregation by himself in the five years before I arrived on the scene.

In each of these situations, I was confronted with the need to change many traditionally ingrained processes and staff. I needed a framework that allowed me, our staff, volunteer leadership, and the organization in general, to adapt and thrive through the challenges, and to take on a gradual but meaningful process of change. Many situations required a quick process. I had to diagnose the essential from the expendable to bring about real change in the status quo. From simple processes such as whether and where to sell High Holy Day tickets, to more complex fundraising strategies that would establish a commitment to giving, I had to navigate human dynamics, task processes and organizational goals with a rabbi, the spiritual leader with established authority.

Much of what I learned in my career about adaptation and the evolution of change has been through trial and error; I would imagine that other executive directors have experienced the same. However, my recent research on adaptive leadership practice has shown that this methodology been a staple in the US military since 2006 and there is much written on the subject. This is not surprising based on the complexities of world power shifts, wars, and the needs and expectations of an established military hierarchy. It is also not surprising to me that the tools needed by the military are the very same cognitive and emotional tools needed by executive directors to deal with both daily and long-term strategies in a synagogue. One can certainly, and with humor, notice the resemblances to daily skirmishes, strategized battles, and outright war when reading Yammer posts or in discussions with colleagues. However, while the military addresses the need for adapting operations based on observing events and patterns, interpreting those observations and designing interventions based on those observations, there is usually a scarcity of direction or time given to the executive director who finds him/herself in a new or perplexing environment.

Little has recently been written about the relationship between the senior rabbi and the executive director in decision making. There are guidelines from the various movements as to the role of the rabbi, and synagogues have greatly detailed job descriptions outlining the tasks expected to be accomplished by the executive director. In 2006, a brilliant FTA thesis by Livia Thompson, then executive director of Central Synagogue, NY, exposed the confusion. She noted that “executive directors are acutely aware of the ambiguities of the position: formal reporting to the president versus communications with the rabbi; balancing their role as independent business managers with their equally important cooperative and supportive role vis-a-vis the rabbi; being leaders and followers, working on behalf of the lay leadership and the congregation and on behalf of the rabbi; and focusing on the daily work while thinking ahead about the future of the congregation.”

Dr. Ronald Heifetz of Harvard University stated that “adaptive leadership is the practice of mobilizing
people to tackle tough challenges and thrive,” (The Practice of Adaptive Leadership: The Tools and Tactics for Changing your Organization and the World [2009]). It is my opinion that adaptive leadership is also the ability to know yourself and mobilize your own skills and emotions to tackle those challenges.

In two of my previous jobs, the rabbi was absent for a great deal of time. I became the go-to person for all levels of decisions and strategic concerns. I would not only handle day to day operations, but all the decisions regarding membership, fundraising relationships, and frequent ritual decisions. My learning experiences were a daily exposure to likes and dislikes, needs and desires, and financial concerns. I used observation and moving people and things quickly to make change. My goal was to fix the situation and move on. I took on the role of rebel, quickly bringing issues to the forefront, designing a strategy and making changes. True, I made sure that I had buy-in from key shareholders, but I didn’t do a lot of responsibility sharing. The rabbis with whom I worked and learned were from the “old school”; they were accepting of my approach just as long as it didn’t step on their pastoral or spiritual responsibilities. The results were successful because of the newness of my approach which made the rabbi look good.

As my professional synagogue portfolio grew, I discovered that finding the right balance between knowledge and action is far more difficult than just “the art of fixing.” We often take steps based on previous experience rather than careful observation and strategy. Executive directors with various levels of experience may start a new job with explosive ideas for improvement of systems and programs, and little understanding of congregant relationships and history. I believe that no matter how intelligent you are about your ability to relate or how to get tasks done, it is never enough knowledge. I have always been proud of my abilities to quickly see the big picture, address concepts needed to recognize the goal, and drive home the tasks to reach that goal. On the other hand, I have occasionally been labeled arrogant and non-listening as I navigated the frustrations of ineffective board leadership, lack of proper staffing, the strength or weakness of the clergy, or the efficacy of the synagogue mission.

One thing that the world and Judaism teaches us is that if we make ourselves aware and present, there is always more to learn. Sometimes, however, one finds oneself in the right place at the right time. And, after 30+ years of working in “Jew biz,” I have luckily found myself in a position of leadership and partnership with a younger rabbi who not only has a strong vision, but is cognizant of the attributes of his staff. He is not afraid of talking directly about what he needs and what he sees. He has the will and the skill. He has grown the community by over 50% during his tenure, increased the staff and reset the congregation into an enviable place in the community. This is the first position where I accepted my role reporting to the rabbi rather than the Board, and in which I have learned to use (even though I didn’t realize it until now) the tenets of adaptive leadership. I have learned to sit back and observe events and patterns, interpret them and design interventions primarily based on observations rather than on my knowledge from previous situations. The rabbi and I meet formally once a week and informally many times a day to share information and tasks, figure out what we know from the past and invent new ways to go forward. We work together; we rarely make a decision without consulting each other and other members of leadership, and we laugh together.

Ron Heifetz, Alexander Grashow, and Marty Linsky, of Harvard University, provide the following recommendations for practicing adaptive leadership:

• Don’t do it alone

• Live life as a leadership laboratory

• Resist the leap to action

• Discover the joy of making hard choices

The rebel in me particularly loves the idea of living life as a leadership laboratory and that every new experience is a creative opportunity for me and the synagogue. On a daily basis, I remind myself (with appropriate reminders from my partner, the rabbi) that there is a team, that I have to delegate and that I have to share decision making. Whether it is up or down in the hierarchy, everyone has to be fully committed to the collective objectives. Through our different eyes of leadership and experience, the rabbi and I can successfully fulfill our leadership and management roles. This process and mutual understanding allows us to “discover the joy of making hard choices” for our community.

Nancy Drapin is the Executive Director of Temple Kol Ami in Scottsdale, Arizona. She is a specialist in nonprofit management with more than 35 years experience in public education, arts and culture, and Jewish communal organizations. One of her secrets to good leadership is an open door and huge bowl of chocolate. ☕️
Triumph and Tragedy: Why I’m so Committed to Strengthening the Jewish Community

April Baskin, Vice President of Audacious Hospitality
Union for Reform Judaism

Judaism is not simply a religion; it is a family. While communal change can seem glacial at times, we are in fact an ever-growing and evolving people with many Jewish traditions and cultures that span the globe. In North America, many are born into our extended Jewish family, about half marry in, and many were adopted along the way. While statisticians claim that intermarriage is the cause of dwindling Jewish participation, the stories of my parents and thousands of interfaith couples, Jews of color, LGBTQ Jews and Jews with disabilities tell a more multi-dimensional story: Many of us have not waned in our Jewish commitments, but instead have had our efforts to participate and join Jewish community thwarted by intentional and unintentional barriers.

I deeply believe that every person should have at least one community in which they feel fully supported and unconditionally accepted. One they can count on to be there for them over the course of their lives. I consider it part of my life’s work to ensure this also be the case, or at least a realistic option, for many more Jews and their loved ones. This mission is a personal one; inspired by the community that took my family in and supported us through triumph and tragedy.

When I was nine, my family moved to an area in northern California that had a very small Jewish community. My parents – a young interracial and initially-interfaith couple – decided that they wanted to join a congregation and be more proactive about raising their two young children as Jews. They were turned away by not only one, but two congregations.

Fortunately for me, my parents decided they still wanted and needed the support that a congregation could provide – and that Judaism was theirs to claim. So, even after two alienating experiences, they tried again. On their third attempt, my parents were welcomed into a wonderfully accepting Reform Jewish community, Sunrise Jewish Congregation. However, my parents were young recent college graduates and could not afford to pay the full amount of dues. The congregation offered dues relief and requested payment of one dollar. My parents agreed, handed over the one-dollar bill, and the rest is history.

Sunrise Jewish Congregation became my second home and the cornerstone of a wonderful childhood. We attended Shabbat services and religious school regularly. My father took Introduction to Judaism and began studying with the rabbi. My mother joined the Board of Directors and later served as the Director of Education for a couple of years.

I was very engaged in youth group. In my senior year of high school, I served as youth group president, as well as the social action vice president for NFTY Central West. But that wasn’t all that happened in my senior year. Late in the fall semester, a careless 22-year-old in a fast Honda changed my understanding of the capacity and power of community – and most certainly changed my mother’s life forever. He came speeding off the New Jersey Turnpike, going 80 miles an hour in a 20 mile per hour zone. When he turned a sharp bend on the off ramp, he saw my mother’s rental car stopped at the traffic light, and slammed on the brakes, but nonetheless crashed, full-speed, into my mother’s car.

The airbag didn’t deploy. Her seat broke. And so did her cervical spine.

When I learned of the horrible accident, my world began spinning and I couldn’t breathe. Was she going to die? How could we survive without my mother? And, my father was seemingly on his death bed at that time. An aggressive chemotherapy treatment was unsuccessful in fighting the battle against his Hepatitis C diagnosis. He was bedridden and barely conscious or able to speak. He no longer had the personality of the father who raised me. As far as I could tell, that righteous, sweet, loving, vibrant man was already gone.

It was a devastating situation and my brother, Andrew, and I certainly were not equipped to manage it alone. My mother was the mighty, unflinching glue that held our fragile family together. Without her, we were lost.

Even today tears fill my eyes when I recall how...
members of our congregation, our community, were there, that first night, bringing meals and groceries. By the next morning, a cadre of our dear congregational family friends and temple lay leaders had established not only a food delivery schedule, but also a carpool schedule to get me to the magnet high school I attended, located one hour, each way, from our home. This story would have been drastically different were it not for the organized and loving intervention that our congregation provided.

Today, I’m incredibly grateful to still have both of my parents, who have invisible, but very real disabilities. I try to always remember to treasure each of our interactions because Andrew and I came deathly close to losing them both. I refuse to visualize what that story line would be like. Though, when I do, I am provided with comfort knowing that our Jewish community would have been there for us. That, to me, is remarkable. It is remarkable and also possible or already a reality in Reform congregations throughout North America.

Thirty years ago, our congregation embodied audacious hospitality before the concept was conceived. They embraced diverse families from nearly all Jewish denominations, racial and ethnic backgrounds, accommodated for disabilities and even had an openly gay cantorial soloist, Glenn Cooper (z”l), in whose honor we made a panel for the AIDS Memorial Quilt. We had a thriving religious school despite limited funds and an enriching intergenerational community in which elders and youth were well-acquainted. For me, the “audacious” element of audacious hospitality is the insistence that we do have the capacity to be courageous enough to take risks for the sake of being far more inclusive and intentional about our diversity, while also not forsaking or watering down the richness and depth that Judaism offers.

My mother recently shared, “our rabbi was part-time when we first joined, but we had a ton of families and a thriving religious school. A number of families were on dues relief, but people stepped up. We made it work. I’m glad that we were turned away [by the cantor of one of the other congregations]. Because ultimately, he was right. I don’t think we would have thrived at his congregation at all. [Him turning us down] was another way of saying, ‘We’re not ready for you, but someone else likely is.’”

My childhood was not without its heartache and challenges, but my Jewish community invested in my family and we wholeheartedly reciprocated. As a result of my family’s refusal to accept initial rejection from some religious authorities and commitment to engaging with the synagogue and fostering an enriching Jewish home, I have inherited a tradition and extended family that I know will be there for me throughout the rest of my life. I am committing my life to helping more people have access to, and be embraced by, such a loving community. I believe Jews (along with many other peoples) have a critical and uniquely distinctive role to play in fostering a world of wholeness, justice and compassion.

EPilogue

At first glance, this is simply a story about great people within a warm Reform congregation acting with compassion, practicing inclusion, and prioritizing relationship and belonging. Yet, I know, just as many administrators do, that while most people are good, moments and experiences like the ones I articulated above do not occur in a vacuum or happen on their own. Those moments are made possible and enhanced by effective, well-informed adaptive leadership. This is not to say that audacious hospitality can’t organically occur, because obviously it can and it does. If one looks deeper, many if not most of my positive childhood encounters with the Jewish community were undergirded by not only our Reform Movement’s core values and trailblazing outreach work, but also by executive leaders on the local level who established practices and policies that cultivated these moments of connection and inclusion.

In reality, the foundation of audacious hospitality is core Jewish values and resources and principles that can inform and guide the evolution of local communities’ existing policies, program and culture. For this reason, my colleagues and I developed the Audacious Hospitality Toolkit and two robust supplemental resource modules covering Jewish LGBTQ inclusion and Jewish racial and ethnic diversity. Available for download from Audacious Hospitality’s webpage on www.URJ.org, this suite contains more than 100 resources including everything from a welcoming website checklist, to sample inclusion statements, LGBTQ-inclusive membership forms, a building audit, and a shared agreements template for difficult conversations.

As temple executive directors, administrators and managers, you know better than anyone that you are often the first point of contact for many of your

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Strengthening Your Congregation
The Executive Director’s Role in Governance and Leadership Development

David Mersky, Founder and Managing Director
Mersky, Jaffe & Associates, Newton, MA

What is your role as the congregation’s Executive Director in strengthening the synagogue’s governance and leadership development programs?

Do you wrestle with any of the following questions?

• Does every member of the Board contribute financially to your congregation’s annual fund at a personally meaningful level?

• Does the Board of your congregation spend twice the amount of time debating a $700 expenditure as it does your $3.5 million budget?

• Are there people who have been sitting on the board since the beginning of time?

Finding, cultivating, recruiting, orienting, engaging, and continually educating board members is no small task. Strong boards have a clear understanding and commitment to the notion of good governance as well as dedication and consistency to the strategic leadership of the congregation. Unfortunately, there is often a space between what synagogue boards know they should do and the reality of what occurs.

That’s where you, the executive director, come in.

Keep your eye on the prize: it is in your best interest to assure a high-functioning board that provides sufficient resources through credibility, labor, stability, income, or, otherwise known as wisdom, work, wit, and wealth.

Ideally, the process of creating the culture of the board should be the province of a standing committee on governance and leadership development staffed by you, the executive director. This new, year-round governance and leadership development committee will replace your ad hoc nominating committee. What will this committee do?

• Assess the current makeup of your board.

• Propose criteria for and select prospective board members.

• Cultivate a confidential, cumulative, ongoing list of prospective board members.

• Recruit prospective candidates.

• Present candidates to the board for approval.

• Orient new members to their responsibilities.

• Involve members in the life and work of the board.

• Recognize the board’s achievements.

• Plan for individual board member’s self-assessment and an annual board evaluation.

• Create a program of personal development through board retreats and educational opportunities.

Once the standing committee on governance and leadership development has been created, charged with its responsibilities, and begun to function, you should start to realize the following outcomes:

1. An enhanced sense of true partnership between staff and volunteer leaders. The partnership is rooted in a recognition that the board sets policy and assures that the resources are available for the staff to fulfill the congregation’s mission and strive to achieve its vision. Strong, empowered staff attract great boards, but micro-managed staff soon leave a congregation. When the focus of meetings is on operations and not strategic thinking, the board ends up looking through the wrong end of the telescope never able to see the big picture.

2. A budget that shows the resources needed to ensure high-quality service. A committee on budget and finance is responsible for providing adequate revenue rather than drill down and look at individual choices made by staff.

3. An intentional design for the number of members, characteristics desired, roles, functions, terms, obligations, responsibilities, and personal/collective accountability.
4. An understanding of how the board needs to be managed (e.g., jobs assigned, deadlines set, work assessed) – a set of tasks undertaken by the board chairperson and executive director.

5. Clear ways in which your volunteer leaders can become dedicated, articulate public advocates of the mission and services of the congregation. You will be able to set the stage for success by organizing orientation meeting(s), ongoing personal development, mentoring, written expectations, and aiding everyone to choose the ways in which he or she can help the congregation best.

And, as the executive director, in your role as senior staff for the standing committee on governance and leadership development, you are the board chair’s partner and assure his or her success (as well as your own). You can achieve whatever you can conceive if the leaders are passionate, pervasively optimistic and do what they say they are going to do. The bottom line is that people are ultimately more important than the mission: donors and funders are considerably more likely to invest their charitable dollars when they believe in and are inspired by a congregation’s professional and volunteer leadership.

This article is adapted from “How You Can Engage New Board Members: Strengthening Your Nonprofit Organization,” by David A. Mersky in collaboration with Abigail Harmon, © 2015, Mersky, Jaffe & Associates.
Adaptive Leadership and Security in Our Synagogues

Judy Moseley, FTA, Executive Director
Temple Beth-El, Providence, RI

All crises are fraught with uncertainty. While uncertainty must be reduced to the maximum possible extent, it can never be completely eliminated. Accordingly, efforts will always be necessary to deal with the unexpected. Effective leaders are compelled to continually improvise, innovate, and adapt to ever-changing circumstances. The most successful leaders are able to both anticipate a change and promptly deal with it. Developing these types of leaders then becomes an imperative. The concept of adaptive decision-making is best understood as the mental process of effectively reacting to a change in a situation. In the simplest terms, it refers to problem-solving. There are three major factors involved. First, the essence of the concept is a behavior change. Obstinate continuing a course of action despite significant changes in the circumstances is not adaptive even if it is effective. It makes no sense if outcomes become more difficult to achieve. Lastly, any response must be in reaction to a change of circumstances, change for its own sake is not adaptive. A culture of adaptability is vital to successfully keeping our synagogues secure. As executive director administrators, we see the world and its concerns about safety are changing at a rapid pace.

I started at Temple Beth-El six years ago. We are located in the city. We had an alarm system. We had some cameras. We had buzzers on our two main doors to let people in. I often come in early or stay later than most. I asked where is the panic alarm? Everyone looked at me blankly. I asked what do I do if I am alone in the building and there is a problem. Still some blank looks. Then someone said call 911. I then asked where is our security plan? Total silence. I knew then one of my first big jobs was to look at what we had in place and then take it to the next level.

In order to create increasingly aware Jewish communal institutions, one must develop and utilize a security plan. A sound security plan that will leave an institution better able to thwart and, if necessary, recover from, a security breach. Remember: the best way to protect your institution is to prepare for and prevent an incident’s occurrence in the first place.

A sound security plan in a Jewish communal institution is often as much a management issue as it is a technical one. It involves motivating and educating all staff, leaders, and community members to understand the need for security and to create and implement a coherent security plan.

But it cannot stop there. Of course, we can plan and develop security plans. But we need to be ready at any time to reassess and react quickly when things change or crisis occurs. Our manuals will never cover it all in this crazy world. Adaptive leadership is critical. As the world changes so will the ways to keep our synagogues safe. It is critical to our community’s safety to quickly respond and adapt.

Judy L. Mosely, FTA, has more than 15 years of professional experience working in the Jewish Community. Judy spent seven years as Executive Director of Congregation Beth Israel in Worcester, MA. Prior to this she worked two years as an Operations Manager of MetroWest Jewish Day School in Framingham, MA. Before becoming a Jewish communal worker, Judy was a small business owner. For six years Judy was the President of J & M Bagel Inc. dba J & M Bagel & Bean Café. Judy Moseley holds a BS degree in Gerontology and Volunteer Administration from University of Massachusetts, Amherst, a Master of Business Administration (MBA) degree from Northeastern University and is a FTA (Fellow in Temple Administration). Judy and her husband, John, are proud parents to son Mark, a Robotics Research Software Engineer in Massachusetts, and daughter Erin, the Programmer & Events Manager at Temple Emanuel in Newton MA.
I was so glad to hear that we decided on the theme of Adaptive Leadership for this NATA Journal. It is a topic relevant to us all. In fact, it is a preview of the upcoming Boston conference where we will discuss “Working for Today, Innovating for Tomorrow: The Ever-Evolving Role of the Executive Director.”

Adaptive Leadership was coined by the Cambridge Leadership Associates and is defined as: “a practical leadership framework that helps individuals and organizations adapt and thrive in challenging environments.” We are honored to have Dr. Max Klau as one of our impressive Boston speakers, whose scholarly work has focused on leadership education, specifically the application of the adaptive leadership model.

Adaptive Leadership is being able, both individually and collectively, to take on the gradual but meaningful process of change. To be successful change agents we must evolve to stay current. We must adapt to changing times in many ways: new technology, human resources, changing demographics, world events, governance, new visions and more.

Few of us are trained to deal with transition, however we are often the instigators of change management. We all adapt, and we all accomplish change, employing a variety of styles and methods. As different as those approaches may be, it is my opinion that we share a common perspective of being team-focused, with a “democratic” style of leadership where we involve lay leaders, clergy, and staff in making decisions. As executive directors, we help to provide and support congregational direction. We realize that flexibility is key to the success of any directional strategies, so our leadership styles may need to shift depending on the specific situation, task and people involved. Our goal is to preserve and enhance the strength of the synagogue community.

Many experts suggest that leaders with the most flexible styles are more successful. As we collaborate with clergy and lay leaders we must always be prepared to understand and adjust. When working with a team, it is impossible for everyone to get their way, so compromise is essential as we focus on the well-being of the congregation and the task at hand. We need to be effective communicators by dealing with situations thoughtfully and remaining mindful of the feelings of others. To do all this, we need exceptional listening skills and the ability to allow others to share ideas or thoughts in a supportive and non-hostile environment. I look forward to supporting that concept in Boston and beyond!

“**We realize that flexibility is key to the success of any directional strategies, so our leadership styles may need to shift depending on the specific situation, task and people involved.**”

Michael Liepman is the NATA Executive Director since April, 2015. Prior to that, he was in the field of synagogue administration for over 20 years. Michael has served on various boards and served as the Administrative Secretary on the NATA Board. He has also served in various capacities with NATA as a volunteer lay leader.

Michael’s home is in the San Francisco Bay Area where he has lived for most of his life, graduating from U.C. Berkeley with a B.S. in Business Administration. He is married and has three adult children.
NATA Mission
NATA prepares and inspires synagogue management professionals to serve and lead congregations with excellence.

NATA Vision
Synagogues and other vibrant centers of Jewish life engage outstanding talent and have the necessary resources to thrive and evolve.

NATA Strategic Priorities
Enrich members’ professional and personal development. Advance and promote the profession. Serve as the voice of synagogue management.

THE NATA NATIONAL HEADQUARTERS
The NATA National Office has moved to El Cerrito, California. All correspondence and inquiries should be sent to Michael Liepman, Executive Director at 3060 El Cerrito Plaza, #331, El Cerrito, CA 94530. Michael can be contacted by email: mliepman@natanet.org or phone at 800-966-NATA or 510-260-7269.

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