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From the Editor
Elaine Arfia, FTA, Editor, Executive Director, Indianapolis Hebrew Congregation, Indianapolis, IN

Leadership. Our congregations rely on our own members to voluntarily take on leadership roles and positions. Unpaid and often unheralded, our lay leaders carry the responsibility for maintaining the life and programs as well as the bricks and mortar of our synagogues. Such responsibility implies a great deal of knowledge about the history, policies, membership, and finances of the synagogue. That responsibility also implies a small amount of leadership skills, those communications, organization and interpersonal skills that really define "leadership."

It is a rare congregant that can step into the demanding role of Board member and perform creditably without some kind of developmental program. In this issue of the NATA Journal are a wealth of experiences and ideas of programs from guidebooks to training sessions to long courses. We administrators have a stake in making sure that our synagogues have the highest quality leaders. We thank the contributors to this issue for sharing their experiences and their expertise.

From the President
Fran Kamen, FTA, NATA President, Executive Director Temple Jeremiah, Northfield, IL

Leadership, commitment, dedication, pride, integrity, participation—all key ingredients in an organization's success. We at NATA are fortunate to have so many individuals who demonstrate these qualities. Our level of participation continues to rise and is paralleled by our level of excellence. As synagogue professionals, we can use the success of our own organization as a model for our congregations to insure leadership and volunteer development.

What makes volunteering within NATA so attractive? Why do so many members want to sit on committees? Why do so many colleagues seek positions on our Board? What makes active participation so meaningful within our organization?

The answers are that within our organization, volunteering and participation mean that individuals can make a significant difference and provide direction and growth. Members recognize that their involvement is important and needed and critical for our success. Our membership is invested in our organization and the expression of this commitment are the large numbers and high quality of our volunteers.

We know how to do this...we are already doing it. Examine your organization's success—what makes it so...and apply it to your own congregational needs for stronger leadership and volunteer participation.

The specific motivating force that gives NATA its level of success is our sense of direction. We know who we are as an organization, what our strengths are, and most important, where we want to be. All of our efforts are directed at achieving our goals and objectives.

Does your congregation have a Mission Statement? A Long Range Plan? A defined set of goals and objectives? Who does the dreaming? Do you know who you are and where you want to be? And do your congregations keep these in mind in designing programming and developing new and continuing leadership?

If your answer to these questions is "yes," you are already on a success track. Keep up the good work! If your answer to any of these questions is "no," you already know where you need to begin and what you need to do.

Key to your organization's success is recognizing who you are, where you have been and where you want to go. If these components are in place and direct your congregation's activities, your congregation's success will be measured by stronger leadership and more powerful volunteer development.
Enriching the Board Experience

Rabbi Janet R. Marder, Director, UAHC Pacific Southwest Council

Reform Judaism began with an effort to reinterpret the experience of synagogue worship. Traditionally, prayer had been regarded as avodah, service offered to God in fulfillment of a divine command. But under the influence of Enlightenment thinkers, Jewish intellectuals began to regard worship differently. "God does not desire our service," wrote Isaac Euchel, an editor of the 18th century Hebrew journal HaMeasef. "Instead, God permits us to make use of outward acts in order thereby to reach the great goal of our own improvement and perfection."

As recast by Euchel, the purpose of worship was no longer to serve God but to benefit the individual worshipper—to uplift and ennoble the character and to transform one's inner life. Subsequent efforts to reform the synagogue service by adding choral music, an organ and a sermon in the vernacular were spurred by the Reformers' desire to provide a beautiful and inspiring environment for worship participants. And despite all the changes in Reform worship styles over the years, our efforts have continued to focus on meeting the needs of participants, by creating a mood and setting for prayer that are aesthetically appealing, emotionally nourishing and spiritually meaningful. In worship, we have learned, it's not only the outcome or "product" that counts; the process and experience are of paramount importance.

Perhaps it's time for a similar "reform" of the synagogue Board experience that would assess not only its objective outcome—that is, its efficiency and productivity—but also its aesthetic, emotional and spiritual quality. In fact, the two realms are closely related. I believe that congregations that devote thought and attention to the subjective experience of Board members will reap the benefits of a loyal, committed and productive Board.

Most congregations regard Board leadership as a way of serving the temple, and most recruit potential Board members by stressing the obligation to contribute one's time and energy for the good of the temple. Certainly, duty and obligation are central motivations for many lay leaders. But even the most devoted volunteers will tire of serving on a Board that offers no intrinsic rewards other than the satisfaction of doing one's duty. Serving the temple—doing the temple's business—is not the only purpose of a Board.

Synagogue leadership offers an opportunity to transform lives—to refine character, unleash creative energies and promote religious growth. Effective Board development thus involves thinking not only about how the temple's needs will be met, but about how the needs of Board members will be addressed, and how the Board experience can be shaped to have the most positive impact on every participant. It's crucial for synagogues to understand that their Board recruitment efforts compete with a plethora of other rewarding volunteer opportunities in the Jewish and general community. Board leadership must offer an experience that is at least as gratifying and meaningful as coaching a child's soccer team, leading a scout troop, volunteering in a school, tutoring illiterate adults, feeding the hungry, chairing an important Federation committee, or serving on the Board of a university, hospital or social service agency. All of these activities consume time; all involve exertion of one sort or another; but the mark of a rewarding activity is that, rather than exhausting us, it nourishes our spirit and renews our enthusiasm.

Begin, then, by asking a hard question: does serving on our congregational Board offer rewards commensurate with the sacrifice we ask of family time, personal time, or time spent in other worthwhile volunteer activities? In the course of my work I meet hundreds of Board members. A surprisingly high number report dissatisfaction with the Board experience. Those in small to medium-sized temples most often cite as problems the stress of serving on the Board, the frequency of interpersonal tensions, and the drain on their time and energy. Those in larger congregations complain about tedious Board meetings at which they feel like passive spectators; the real business of the congregation, they say, is carried out by the staff or perhaps the executive committee, and the Board is left feeling irrelevant or redundant. For congregations of all sizes, the result is the same: Board members are left feeling depleted, rather than enriched, by their service on the Board.

We've all given thought to how time can be used more productively at Board meetings—by eliminating unnecessary committee reports, by ensuring that a few members do not dominate the discussion, and so forth. But I want to suggest an approach that goes beyond efficient time management. Not only do we need to be respectful of our Board members' time; we should think creatively about how to use their time in as rewarding a fashion as possible. In recent years I've thought a lot about how Board meetings can be designed to replenish the energies of our volunteers, rather than to exhaust them. I find it helpful to think about three essential kinds of nourishment that Board service should provide: emotional, intellectual and spiritual. Warm interpersonal connections based on shared values and commitments, the intellectual excitement of learning and taking ownership of Jewish texts, developing a sense of God's presence in the work of congregational leadership, are powerful antidotes to the "poisons" so prevalent in Board work—the boredom, burnout and toxic irritability that so often
develop under the stress of doing temple business. When shaping the meeting agenda, we should ask ourselves: In what ways can we fortify and sustain Board members to withstand the demands of leadership? In what ways can we renew their commitment to the temple? How can we help them find meaning and value in the work they have chosen, so they'll be motivated to share their time, their energy, their talents and their financial resources with the congregation? Thus, some suggestions for enriching the Board experience:

1. Begin and end the meeting with prayer and/or song. Some Boards ask a member to offer a personal prayer or reflection on the meaning of serving the temple; some use Sheheheyanu or the Shema to convey the sense that the Board has come together for a sacred purpose. Others sing Oseh Shalom, join hands or share a moment in silence.

2. Spend a moment in silent prayer to “cool down” at a moment of tension, or before the Board needs to make an important decision. Encourage members to listen for the still, small voice of God at such moments. Include a provocative Jewish quotation, traditional or contemporary, on the agenda distributed at Board meetings.

3. Place a volume of the Torah or Tanach in the center of the table as a concrete sign of the Board’s central priority. Incorporate study into the body of the meeting, rather than marginalizing it at the very beginning, when latecomers can avoid it. A meeting that begins with a D’var Torah and then moves on to the “real” business conveys a different message than a meeting that places study in a central position.

4. Involve the members in interactive Torah discussions to encourage them to relate personally to the text. Move beyond a rabbi-centered approach to Torah study. The cantor, administrator or educator can be asked to share a text that has personal meaning for them. This is a good first step to empower lay people to become teachers as well as students, by demonstrating that our sacred texts belong to all Jews.

5. Choose a one-year curriculum for Board study—either the books recommended by the UAHC, or some other topic of interest, such as Jewish ethics (business, medical, parent-child, friendship, relationships with non-Jews, etc.)

6. Make sure that each meeting agenda includes one or more substantive issues for lively deliberation and possible action. Integrate Jewish study into the topic under discussion. Consider innovative formats—a debate, panel presentations, a position paper followed by small group discussion. In addition to significant issues currently facing the temple, give the Board an opportunity for engagement with controversial issues in the Reform movement or larger Jewish community.

7. Help Board members to develop deeper relationships by encouraging values-centered communication. Take time for general or small-group discussion of questions such as: What was a pivotal moment in your personal Jewish journey? What’s a Jewish challenge you’re currently facing in your own life? What’s the closest you’ve come to sensing God’s presence? Ask Board members to share an experience at the temple in the last month that has touched them.

8. Consciously model respectful, gracious ways of relating to one another. Establish a code of ethics for Board discussions at the beginning of the year, and couch the rules in Jewish rather than “corporate” language. It is an act of hesed (kindness), for instance, to avoid humiliating another person in public. Study and discuss the laws of lashon ha-ra (gossip and slander) and their implications for temple leaders.

9. Invite a temple member to speak to the Board about a powerful, positive experience with the congregation’s religious school, social action program, clergy, adult Jewish learning program or some other area of temple life. Hearing from a recent convert, an adult Bar Mitzvah, or the parent of a “special needs” child who has been helped by the temple puts a human face on the Board’s efforts and helps them realize the powerful impact of their work. No single meeting could or should contain all of these elements. Some Board members will be threatened by new approaches, and they will have to be introduced gradually. What matters is the kavanah, the attitude or intention we bring to the work of the Board. **Good leaders are the most precious asset of any congregation**, and we take them for granted at our peril. To maintain their interest and earn their commitment, we must nourish their minds, hearts and souls.

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**NATA Placement Service**

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Planning for the Future: Leadership Development Class

David R. Cohen, Past President of Temple Emanu-El, Birmingham, Alabama and current V.P. of the Southeast Council of UAHC

Lois M. Cohen, Director of Education and Youth at Temple Emanu-El, Birmingham, Alabama

Is your congregation experiencing a leadership void? Are you losing potentially good leaders to other organizations, both secular and Jewish? Yes...?

We had similar concerns. After hearing about leadership development and the wonderful possibilities for congregational growth, we sought to create a Leadership Development Class (LDC) for Temple Emanu-El, in Birmingham. Our goal was to identify, train, nurture and involve new, knowledgeable and enthusiastic leaders willing to assume their place in the future of our Temple. In May '98, we "graduated" our third class. Our graduates serve on the Executive Committee, the general Board and the Endowment Board. They serve as chair people and members of committees.

Particular aspects about our program are:

The Leadership Development Committee (LDC)

The LDC is a three- to four-person committee which facilitates and organizes the overall program and individual sessions.

Choosing Class Members

Nominations of possible candidates are requested from current Board members, past presidents, the professional staff, the auxiliary organizations, and past LDC graduates. An open invitation for nominations (and self-nominations) from the general membership is made through the bulletin. This identifies someone your process may miss, and it addresses the concern that the class is "exclusive." These names are reviewed by the Rabbi and the LDC. Candidates are chosen from this list. The class must have 30-36 members for optimum results.

Invitations

A formal invitation is sent to those selected. The invitation must convey the honor and importance of being selected to participate. Even those who respond from the open request in the bulletin must be made to feel they were recommended by someone who enthusiastically offered their name. Included in the invitation mailing is a list of the exact dates and meeting times. Prospective members are expected to commit to missing no more than two sessions per year. Otherwise, they are encouraged to put their names on the waiting list for consideration for another year. The invitation is signed by the Rabbi and the members of the LDC.

Project Oriented Curriculum

The class members discuss and target concerns they have observed about the Temple; i.e., lack of programming for seniors, insufficient programming for young families, weaknesses in communications (members don't know what's going on). The LDC participants develop programs to address the most pressing issues, as identified by the class. In the process, the LDC "teach" these new leaders what they need to know about the Temple—the budget, running a meeting, setting an agenda, who does what, etc. As they join committees and the Board, they are knowledgeable about the inner workings of the Temple.

Cost

Our program budget is $600. The budget covers mailings, materials and the graduation session to which the Board of Directors and spouses are invited. Each session includes dinner for which the members pay.

Year-long, Seven-Session Plan

Each session meets monthly from 6:00 - 9:00 p.m. and includes dinner. The class is held every other year. We were concerned that if we graduated 30 -36 new leaders annually, many enthusiastic, trained members would be frustrated while waiting to be asked to serve on committees and the Board.

Torah Study

At every session, Torah study is conducted by the Rabbi. Decisions and actions must be guided by what is Jewishly appropriate. Jewish study is essential because our Temple leaders are Jewish role models.

Community Building Activities

An important goal of our program is to create an atmosphere of "friends working together." Each session begins with a "warm fuzzy," a question that allows members to share Jewish life experiences. This sharing is sometimes light-hearted and fun. At other times it is serious and emotional; i.e., Share your most outstanding Jewish memory. Why did you choose to participate in this class?

Location

The classes are held at the Temple.

Facilitators and Presenters

All are volunteers from our Temple and the greater Jewish community.
Areas covered in the curriculum:
Jewish vs. secular leadership
Leader vs. manager
Importance of Jewish study
Temple leaders as Jewish role models
Running an effective meeting
Creating a budget
Publicity needs
Understanding leadership styles
Forming a well-rounded committee
Staff responsibilities
The Board and committee structure
The history of the synagogue
The greater Jewish world
The physical plant
Current programs offered at the Temple

A copy of our curriculum is available by writing to us c/o Temple Emanu-El, 2100 Highland Ave., Birmingham, AL 35205. But the following sample will give you an idea of our format.

6:00 p.m. Motzi, dinner and warm fuzzy (during dinner) "Tell us what motivated you to become a part of the LDC?"
6:40 p.m. Torah study with the Rabbi
7:00 p.m. Overview of the budget process with the treasurer and administrator
7:15 p.m. The Endowment Fund: purpose, goals, projects, current funds with the Endowment administrator and president: Securing Our Future Financially
7:30 p.m. B.E.S.T. — Leader styles inventory
8:00 p.m. Break with coffee and sweets
8:15 p.m. Project subcommittee time
8:55 p.m. Written evaluation of class
9:00 p.m. Class ends

Class sessions should be fun and fast paced. The facilitators should involve the class members as much as possible. We must remember that our class is comprised of people who are successful and have already demonstrated leadership potential either personally or professionally. We must evaluate that potential during class by assigning tasks that reveal their skills and strengths. Each session should be tailored to fit the needs of class members who have already spent a long and difficult day at work. They don't want to sit there and be "talked at." Techniques we use during our sessions are storyboarding, small group discussions, walking games, and a scavenger hunt through the Temple.

Creating a knowledgeable and enthusiastic group of new leaders is a task that must happen. We must have a cadre of devoted Temple members who are choosing to volunteer their energies and resources to our congregations. We must be able to turn over the reins to new leaders if our congregations are to thrive and grow in the future. Our LDC is creating that leadership for Temple Emanu-El. Among our graduates were the twice-a-year Jews who were never around. Once having been made to feel wanted and special at Temple, these people are now chairing all types of committees, including fundraising. They have become positive Jewish role models. They are the ones who are making the plans for future programs and growth.

Passing the Torah of Leadership is a must for all of us. We cannot afford to leave anyone out. Too many wait to be asked. Let's not waste any more time—begin asking, training and involving!

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Board Retreats: An Ever Changing Annual Event

Warren Lieberman, FTA, Beth-El, San Antonio, Texas

Temple Beth-El has conducted several Board retreats since 1993. During the summer of 1998 we will be conducting our fifth Board retreat. By definition, a retreat is an activity that takes place away from the usual environment. The participants are removed from all distractions to conduct a special program in an intense, uninterrupted manner. The nature of the business is usually a single major topic or several interrelated topics that require more time than can be allocated in a single evening meeting.

My original objective, when I thought about writing an article for the NATA Journal, was to reflect on the experiences at Temple Beth-El and put those thoughts into a model or "cookie cutter" formula. After reviewing materials from our previous retreats and as our Board approaches the next retreat, I found that original premise not valid, or particularly inspiring. The research revealed the common traits of each retreat: lunch was at twelve; some participants left early; we sometimes scratched our heads as to why we held a retreat and then proceeded to schedule the next one.

Each of the retreats was different. The first was held offsite at the Oblate Retreat Center, a Catholic organization in San Antonio. This retreat was planned and led by the Temple's professional staff and several key lay leaders. Its emphasis was a "nuts and bolts," a basic
Temple organization and management event. The Associate Rabbi, the Membership Coordinator, the Administrator, and many Board members were relatively new to our positions at the Temple. It was the right program at the time. The retreat filled a need, one of basic indoctrination about Temple operations.

The agenda items varied from "What Makes a Good Leader" to financial presentations and an explanation of the Fair Share Dues system. The day concluded with presentations by the professional staff on their duties and a description of a "typical day." Included in the programming was a breakout session in which groups were given different problems to solve. One professional facilitated each group. These discussions were reported to the larger group.

The "What Makes a Good Leader" included a "Ketubah" stressing compatibility, cooperation, and communication for the Temple's leadership. Also, included was a memo from a Past President to the Nominating Committee in 1980. It was the standard for selecting a Board member. Included in this ten criteria (before Letterman's Top Ten) were points such as: well versed in Jewish history and religion, a respected member of the community, service on or chair of a committee, intelligent and creative, and having respect for staff professionalism in a cooperative and supportive manner. This session led to improved lay and professional relations at Temple Beth-El.

The second retreat was also held offsite. This time Our Lady of the Pillar was selected, another Catholic retreat center in San Antonio. This session was preceded by a survey sent to the Board members eliciting their ideas for the topics and issues to be addressed. A professional retreat facilitator was engaged to lead this program. The facilitator began with a brief session on problem solving models and issues of relating effectively to one another. The problem solving model was the guide for the breakout sessions later in the program. Briefly, the model was presented as cooperative and competitive approaches for problem solving. The positive cooperative influences are: all parties are equal; there are enough strokes for everyone; cooperative solutions are possible; know what you want; no power plays, no rescues; and listen to other points of view.

The first half of the program was spent in breakout groups dealing with issues of Board leadership and developing a list of responsibilities, privileges and behaviors. Each group then reported their discussions to the Board.

Several breakout groups were formed for the second half. Each group was moderated by a professional staff member and a member of the Executive Committee. The groups discussed specific problems in education, management, membership, social action and Jewish worship observances. These breakout groups reported at the end of the session followed by a discussion. Included in the report was a "dissenting opinion" by others who may have expressed a different point of view or raised issues not covered.

The evaluation forms and later discussions revealed that, while the issues and techniques used were valid, the use of an outside facilitator not familiar with the Temple's organization and customs was less than ideal. This negative feeling may have been one reason that a Board retreat was not held the following year.

In 1996, we again felt the need to have a Board retreat. At this retreat, and again in 1997, another model was used. These retreats were held at the Temple. A day was picked when there were no other activities or programs to distract the attendees. The familiar setting was comfortable. Despite our previous experience, we realized that a professional facilitator was essential to achieving results, and we contacted the Union of American Hebrew Congregations (UAHC) for help. Rabbi Paul Menitoff and Audrey Wilson lead the 1996 retreat. Audrey Wilson also led the 1997 program.

They brought all the needed materials to the retreat. The Temple provided the site, lunch, minor supplies and willingness. Again, lay and professional relationships was a central theme. Rabbi Menitoff presented a "Relationship Equation." The factors of expectations, empowerment, recognition, bonding and trust were the five main points of his equation. He illustrated the "good and bad chemistry" that upset the balance of the five points. The negative influences were on five components: anger, acting out, withdrawal, negative energy, and apathy. It sometimes is easier to relate to relationship when viewed through a negative perspective.

Another behavior model used in the 1996 session was a "Partnership Model." This model starts with the President and senior staff brainstorming goals and creating an "A" list of goals. These goals would be the central issues facing the congregation. The "A" list flows through the Executive Committee and to the Board. During this time the goals of the congregation would be accurately defined. The next steps would be to assign responsibility, develop the action plan, and evaluate progress while the plan is being implemented.

The 1996 retreat left us hugging; we had the taste of a goal setting process and were let down by not achieving our expectations. In reality we had skipped the first step, that of the creation of an "A" list by the senior staff and President. Creation of that "A" list was now our project for the following year. The 1997 Retreat continued with the same concept of goal setting.

This session also included breakout sessions dealing with major areas of policy determination, resource development, personnel management, Jewish leadership and fiscal management.

This "A" list has become the core of the events and activities of our present Board. We are now working on the plans for our 125th Anniversary year. The action plan has been developed, chairs have been appointed for programming, building needs, publicity, and fundraising.

As the 1998 Board Retreat approaches, we find that we have come
Leadership Development —
So Who Are Our Leaders &
Where Do We Begin?

Michael P. Freidman, Ed.D., Organizational Psychologist, Bala Cynwyd, PA

Dr. Freidman is past president of his Temple, Beth David, in Gladwyne, PA, a member of the Board of Philadelphia Federation of Reform Congregations, and a workshop leader for the UAHC Department of Synagogue Management.

The Union of American Hebrew Congregations (UAHC) and all its constituents are facing major challenges — from fundamental but essential organizational and fiscal matters to those more philosophical, cultural, and theological. At such times, it has become more common among both business and non-profit organizations to view their leadership as one of the most critical assets in effectively addressing current challenges and preparing for the future. Much attention is placed on selection, development, and retention of strong leaders.

So, who are our leaders within the UAHC? Are they to be found among our clergy, professional administrators, program and educational directors, or lay volunteers? Yes, all of us! Much like the legs of a stool, our local, regional, and national organizations cannot achieve their goals without the collaborative efforts of all of our potential leaders. Each of us comes to our shared tasks with different experiences, skills, and perspectives. Much like building a jigsaw puzzle, the richness of the picture will not be complete without all of the pieces — large and small.

Taking a systems approach leads us to the realization that the whole is often greater than the sum of its parts. This kind of thinking is particularly critical when dealing with “big issues” of a conceptual nature, such as organizational and cultural shifts. Many of the challenges we are facing as a movement are of exactly that type — What is the role of religion in contemporary life? How do we adjust to shifts from our classical Reform roots towards more ritual and spirituality? How do we meaningfully integrate increasing numbers of members whose families include Jews-by-choice or non-Jews? What is an appropriate role for the Reform Movement in Israel and the world? Similarly, daily we face implications of massive, high-speed changes in our digital and ever-shrinking world which causes many of us to feel disconnected and confused. These are the times when people need each other, and religious communities are a likely source of support and meaning.

If we, within the UAHC family, are to effectively face such challenges, we must face them together; and there is no better place to start than among our leaders, lay and professional. So where and how do we begin? I offer the following process to be applied (& modified) by all groups of leaders at each functional level (from national to local) within the Union:

1. Define goals based on an articulated vision.
2. Share insights, perspectives, and feelings about both vision and goals.
3. Conduct an honest assessment of the strengths and weaknesses of available resources as they relate to achieving these goals.
4. Brainstorm creative solutions to maximizing resources in achievement of goals.
5. Identify cross-functional (i.e., cross-role) teams to address tasks.
6. Share results and experiences to improve outcomes and build leadership for the future.

The results of our various groups will look different because the particular questions and circumstances will vary but we will make progress, develop answers, and build alliances that will take us into the future better prepared to face new challenges.

Leadership Development - The “PAL” Approach

Faith Avner, Administrator, Am Shalom, Glencoe, IL

The world is sustained by three things: Torah, Avodah, G'milut Chasidim. The environment for effective Leadership Development is built on the successful organization of three ingredients: People, Agendas, Logistics. It has been said, when all of these are in place, everyone will be your PAL. Building the right environment for Leadership Development is as easy as working with your PALS.

People
When your congregation reaches out for new recruits to join the Board or committees does it sound like “please, please, please, we just need someone to fill this last position; there isn’t much work to do, and only a few meetings...?” How a person is first approached and brought into the leadership environment will truly set the tone for their whole term, no matter what position they take. The Nominating Committee plays a key role in the leadership development of the congregation. As the Nominating Committee begins their communication to new recruits, the following is recommended:
1. Send a letter from the Nominating Committee to all nominated candidates confirming the position accepted and dates of service. Information as to what is expected from the position should be included, as well as an “Expectations of Board Members” document.
2. Send to all nominated officers/chairpersons a copy of their job description as outlined in the constitution.
3. Facilitate a meeting of outgoing and incoming officers/chairpersons to promote smooth changeover of leadership.
4. Offer first time Board members, all nominated officers and chairpersons orientations to be held within one month of the beginning of the new term. These orientations could be arranged for by the Leadership Development Committee.

The effort any recruit will give to a leadership position is always related to their perceived value of the position. If the task you are asking a recruit to perform is important to them, you will have 100% of their efforts, skills and attention to their position. I suggest the WIIFT
approach to recruiting. If you ask yourself the following question, before you ask anything of a recruit, you will find satisfaction for both involved: WIIFT—What's In It For Them? Finding the recruit's motivation for becoming involved before you request his/her involvement will lead to success for both of you.

It is equally important that the new leaders and the Nominating Committee share an agreed upon vision of the position accepted. This is where expectations and communication play a vital role in recruiting new members to participate in a leadership role. It is important for the recruits to know just what is expected of them in leadership so they can make an honest commitment to the task. It is the first step in the recruit's personal satisfaction, which will in turn lead to their continued support of the leadership of the congregation. In general, people tend to do things that make them feel good; so if their leadership experience is a good one, they will continue to give.

Delegate; Share; Give purpose; Let my people work—No matter how you say it, delegation is a vital component in leadership. The earliest signs of leader delegation can be found in Exodus, Chapter 18. Moses' father-in-law, Jethro, told him "...the thing you are doing is not right...you will surely wear yourself out...the task is too heavy...you cannot do it alone...enjoin upon them the laws and teachings...make known to them the way...seek capable people...let them share the burden. If you do this...you will be able to bear up...and the people too will go home unwearied." Delegation saves current leaders and creates new leaders.

Once you have a committee (or Board) full of people, it is vital that there is something for them to do. You never want to be in a position in the middle of the year when someone comes to you and says, "What am I doing here?" Every person on the committee needs to have a responsibility other than showing up for the meeting. Sometimes it is as simple as bringing the coffee and donuts and other times it will be coordinating every last detail of the final program. No matter what the task is, everyone should have one! It will build the value of the position and the need for the person's participation, and it ultimately will lead to an opportunity to show positive recognition for a leader's participation.

As important as it is for each recruit to feel personal pride in the position of leadership they take, it is also important to teach the whole congregation that the leadership position in a temple is a position of honor.

As leaders build other leaders, it is critical to remember that the term volunteer automatically suggests a pay scale other than the "green" one we are used to. The volunteer pay scale starts with "thank you," progresses through "thank you very much," multiple levels of "appreciation," and then to "honor and recognition." When deciding how (not if) to honor volunteers, thoughts should include consideration of what is appropriate for the position, what is good for the volunteer and what will help to teach the congregation the value of volunteerism and leadership within the congregation. Suggestions include: Shabbat dinner honoring volunteers/leaders, being blessed at a Friday evening service, a luncheon or brunch, a temple bulletin article featuring volunteer activities and names of those involved, or even a donor wall honoring gifts of personal time.

People are the most vital resource of a congregation. Without people, our members, the congregations would be empty. If the temple individually cultivates each of their congregants as a potential leader, the congregation as a whole will build and lead the temple today and in the future.

**Logistics**

In building strong leadership, there are some basic "nuts and bolts" that will hold all of the loose ends together. Most of them fall into the category of meeting planning. It is always a good idea to schedule meetings in advance (a regular night each month, or with at least three weeks' notice); check the temple calendar (the administrator's favorite part!); and send clear notification (a call to the meeting with an agenda). Plan ahead for participants' comfort during the meeting by asking questions, such as: Is the meeting room the right size for the group? Will an easel be needed? Chalkboard? Supplies? Do you serve food/coffee? Start and end the meetings at the scheduled time. During the meeting, keep minutes that include attendance, agenda...
items discussed, reports, motions and recommendations. When a motion is brought to a committee or Board meeting, there are many items to consider prior to its presentation. The following ten questions will apply to the majority of motions to be considered for presentation:

1. What was the original guidance from the Board of Directors?
3. What were the other alternatives? Why were they excluded?
4. What was the rationale to this motion (the background or the catalyst)?
5. What is the financial impact of this motion?
6. What is the plan of implementation if the motion carries?
7. What evaluation is planned? By when? By whom?
8. What is the impact to other committees? Professional staff? Have they been consulted?
9. Have all temple policies or community laws been observed, i.e., three bids, zoning laws?
10. Notify chair prior to meeting of intent to present motion; include in call to meeting if possible.

After the meeting, minutes should be transcribed and forwarded to all committee members on a timely basis. (A nice side effect of sharing these minutes with the president and/or Executive Committee and key staff members is the increased communication and team building among all involved leaders.)

Record keeping builds continuity and retains history. The transfer of information and direction from one leader to the next can make a world of difference in the continued growth of a strong committee. The committees should not have to re-invent the wheel for the first half of their terms and decide what to do with it for the second half. At the end of each chairperson's term, there should be an organized opportunity for chairpersons to "pass the baton."

A guided conversation covering the following four topics can provide for a smooth transition between outgoing and incoming officers/chairpersons:

1. List three of the most significant programs/activities/projects of the term.
2. List projects/programs you wanted to do or complete, but were unable. Why?
3. List Oy-Vays or problems.

4. List suggestions/warnings
   a. If I had it to do over, I would...
   b. Start with...
   c. Call_______ for help.
   d. Be sure to start a file of records for your successor.

Creating a copy of the information shared between incoming and outgoing leaders, to be stored at the congregation for archival purposes, is strongly recommended.

Leadership Development is the opportunity to create a win-win situation—personal growth for your congregants and community growth within your congregation. It is easy when you remember your PALs—People, Agendas and Logistics! Combine them well, and may you go from strength to strength!

Editors Note: This article is the result of Faith's successful completion of the Advanced Course of the Fundamentals of Synagogue Management. This is a course designed and sponsored by the Irwin Daniels School of Jewish Communal Service of the HUC-JIR and the National Association of Temple Administrators.

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NATA Journal Winter/Spring 1999
TECHNOLOGY

Articles for the next issue of the NATA journal are invited. If you are interested in writing on this subject area, please contact Elaine Arffa.

DEADLINE FOR SUBMITTING ARTICLES IS JANUARY 2, 1999.

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Helping Lay Leaders to Understand the Lay of the Land

Eli Klausner Montague, FTA, Executive Director, Congregation Temple Israel, St. Louis, MO

One of the ongoing challenges facing professional staff is the yearly turnover of lay leadership. At my congregation, the Board of Trustees consists of seven officers elected for one-year terms, thirty-six trustees at large elected for three-year terms, several auxiliary presidents serving one-year terms, and a number of life members. Since the presidents have, by "minhag," typically served three-year terms and since Trustees may succeed themselves for a second three-year term, we usually elect between six and twelve new trustees each year.

Several years ago, the professional staff and the newly elected president sought to address the issue of how best to orient new trustees, whether they were officers, trustees at large, or new auxiliary presidents. Upon finding a 20-year-old Board manual in an old file, I suggested we create a new manual and establish an orientation session preceding each year's first Board meeting. We then created a Trustee Handbook, developed the materials, divided up the various aspects of the presentation and delivered the orientation. The first year this was given to the entire Board. Annually since, each newly elected Board member is invited to a pre-Board meeting dinner and, along with the Executive Committee members, we present the Handbook and a brief presentation of its contents. We ask them to absorb the rest on their own time, encourage them to bring the Handbook to each Trustee meeting and promise to update the handbook for them annually, or as needed.

Since portions of the handbook never change, while others require annual updating, we created the handbook in a loose-leaf binder format with tabs. Current Board members are given the updated pages at the beginning of the first yearly meeting. We have attempted to create a handbook which was meaningful and straight forward, yet would give a new trustee the basics of what he or she should know.

The indexed table of contents is divided into five sections. The first section puts the Temple in context. It includes:

- A summary of the centenary perspective;
- A listing of all Temple programs and groups broken down by basic functions; i.e., the bet t'filah, bet midrash and bet knesset;
- A two-page summary of our history showing key dates and events since our founding in 1886, and;
- A diagram showing the key national, regional and local organizations represented in Temple life - I call this "alphabet soup." It shows the relationship of WUPJ to UAHC to Midwest Council to FORT (our local reform Temples) and so forth for professional staff and auxiliary organizations.

The second section shows our financial resources and includes a listing and description of each Temple fund, current year budget information showing revenues, expenditures, our dues structure, and an analysis of the number of members at various dues levels for current and prior years.

The third section provides information about our human resources. It contains an organization chart of lay and professional staff; rosters of the Trustees and staff; a listing of Board meeting dates for the year, as well as other key events to which Trustee attendance is strongly encouraged; a list of Temple committees, their chairs and the professional staff assigned to them; and a number of charts and graphs describing the demographics of our membership and showing membership trends.

The fourth section consists of reference material. It contains our constitution and bylaws, house rules, building maps, and a summary of Roberts Rules of Order. Lastly, Trustees can use the fifth section to add key material and handouts received throughout the year. When presented, we include a list of Trustee expectations, leadership criteria developed by the Trustees during prior retreats, and helpful information concerning requests for holding committee meetings and events at the Temple.

The new Trustees' orientation has become an annual event. It is a great opportunity to provide concise, yet helpful material to our newest lay leaders. It gives me a chance to give them something they can use and refer to before their first meeting and provides an opportunity for us to get to know each other. Finally, our annual revision of the Handbook involves all of the professional staff of the Temple, each of whom receives a copy. It gives us a chance to step back and look at the big picture of Temple life from a lay leader's viewpoint.

* * *
Board and Leadership Development
Alan Hochberg, Administrator, Scarsdale Synagogue Tremont Temple, Scarsdale, NY

Board and Leadership Development is a difficult area for all synagogues. When I became the Administrator of the Scarsdale Synagogue/Tremont Temple 10 years ago, the congregation was different than it is today. Many families who were members had spouses who were home and could devote time to outside activities.

Today, most husbands and wives are both working full time. When they come home, there is very little time to devote to other activities, except caring for their children. So, before you can develop leadership potential, you must develop a reservoir of people who will be available to serve on committees.

Under the guidance of our Rabbi and our lay leadership, we try to create opportunities to encourage involvement with the Synagogue.

Step one
For new people joining our congregation, we have developed a membership application which highlights areas of interest.

Step two
When these applications are filled out and interest is shown toward a specific area of synagogue life, the Rabbi refers these people to the appropriate committee chairs.

Step three
The local chair of a committee contacts the new members and invites them to a meeting.

Step four
If the member decides to join the committee, they are placed on the regular mailing list for that committee. All future information dealing with that committee will be sent to them.

Step five
After people are involved in synagogue life for a short period of time, the Rabbi will encourage members' involvement based upon their professional skills or other personal skills which would be helpful on different committees. An example would be a CPA joining the Budget and Finance Committee.

The professional staff—Rabbi, Cantor, Administrator, School Principal—and lay leadership (especially the president) are ex officio of all committees. This gives them a very good opportunity to work with future leaders.

Once members are on committees or the Board of Trustees, it is important to have educational programs to help them develop their leadership skills. The UAHC, in cooperation with NATA, has programs and information on many topics of synagogue management. NATA has developed a consulting service in cooperation with the Ida and Howard Wilkoff Department of Synagogue Management, to assist congregations. Leadership development is one area of concentration.

Another valuable resource is the NATA - UAHC Temple Management Manual. The manual defines leadership "as the ability to manage interpersonal relationships affecting both men and women of varying personality characteristics so that they will achieve mutually agreed upon goals."

Dale Glasser, Director of the UAHC Department of Synagogue Management office, is another resource for leadership development. Notwithstanding this resource, probably the most valuable resource initially is the Temple administrator. He or she can obtain further information from the many outlets available to members of the National Asso-

ication of Temple Administrators.

Recently, our congregation prepared and mailed a survey to the entire membership. This can be a very important tool in evaluating the sentiment of the synagogue's members and finding out the committees and programs in which congregants are interested.

Most synagogues publish a monthly newsletter. This is another opportunity to show the entire congregation what Trustees and committees are doing. It is important to recognize the involvement and commitment to the synagogue by these volunteers who do not seek to be acknowledged, and it, also, provides an opportunity to show potential leaders what is involved in being committed to leading the synagogue.

There are always individuals who enjoy being a Trustee or committee chair. The problem for most synagogues is that a handful of people do all the work. This is not healthy for a synagogue because the more that members are involved in committees or as Trustees, the less likelihood they will resign from the Temple when their children's education is completed. Retention is directly affected by involvement of members—the more active, the less chance of leaving.

Senior citizens are a very important source of leadership in all synagogues. Many have time to devote to volunteer activities. In addition, they bring a lifetime of experience to the Temple. However, sometimes it is necessary to reach out to them because some seniors may feel that they are not an active part of the congregation. They may feel too much emphasis is placed on members with young children. It is very important to have programming of interest and appeal to senior citizens. An excellent time to develop leadership among this group of members is during programming activities. Many seniors are very proud to

continued on the next page
Leadership Emanu-El: A Model for Leadership Development

Gary S. Cohn, FTA, Executive Director, Congregation Emanu-El, San Francisco, CA

For many synagogues and other non-profit organizations, the process of cultivating and identifying members to serve on the Board of Directors can be both difficult and frustrating. Why is this so? Why does it seem so difficult to find qualified, talented, and well-informed members who are ready to commit their time, energy and financial resources to the Board of Directors? Sometimes members ask: How does one get chosen to serve on the Board of Directors? Do I have to serve on a committee? Do I have to be a long time member? Do I have to be a large donor? How active do I have to be? Other times it seems that we can’t find anybody willing to even consider serving on the Board.

These are not easy questions to answer. In many synagogues, some Board Members are chosen by who they are, or how long their family have been members, and not necessarily because they have the experience or the knowledge to be good Board members. Some synagogues choose Board members by who is willing to serve. A warm body is better than nobody.

At Congregation Emanu-El, by the 1990’s, it was difficult to see clearly where the next new Board members were going to come from. There was no “pipeline” of talent ready to take leadership roles. The status quo, the way it had always been done, was not working anymore. In addition, a younger generation of members was joining the Congregation for the preschool and the religious school and they had not yet been brought into roles of leadership.

It became clear that a well defined leadership development program was needed. In early 1994 we began to address these issues. A task force on Leadership Development was formed and by June 1994 the task force had issued a position paper with recommendations to the Board of Directors for approval. The general recommendations were: 1) Develop a statement of policy on participation and leadership; 2) Institute a program to encourage members to become involved in committees and Board work; and 3) Establish a Leadership Development program.

**Board and Leadership**

...continued

be asked to serve as a Trustee and help shape the destiny of the synagogue.

In our congregation, the Rabbi and President set an upbeat tone and the Cantor and Principal exhibit an enthusiasm which is contagious. To become a leader a person must have a sense that he or she is part of an exciting, interesting and spiritually uplifting congregation. True leadership develops when ordinary members feel the excitement.

**Statement of Policy**

The task force prepared a Statement of Policy on Leadership Development which was printed in our monthly newsletter in January 1995. It stated:

- Congregation Emanu-El is a membership organization, entirely dependent on the community it is designed to serve. Founded in 1850, we are a significant Jewish religious institution and a focal point for Reform Jewish life in the San Francisco Bay Area. We take pride in being a link in the chain of Jewish tradition and community. Our congregation is 1,500 families strong, we look to our diverse group of members to lead us into the future as a vital component of Jewish culture.

- Congregation Emanu-El is an organization dedicated to the needs of its congregants. We support and encourage members to participate in the development of policies regarding religious worship, education, and all other temple activities. We invite all members to express views, present ideas and options, and involve themselves in the direction of the temple.

- Congregation Emanu-El supports a variety of committees that operate as principal vehicles for individual members to give service and participate in Congregation Emanu-El’s operation and well-being. Each committee acts as a representative for the temple and raises ideas and concerns that affect the congregation as a whole. All committees report to the Board of Directors whose responsibility it is to approve all programs and activities.

**The Creation of Leadership Emanu-El**

The Leadership Development task force and the Board of Directors agreed that the key to developing a consistent pool of talented, educated and active members who wanted to serve the Congregation was to establish a quality Leadership Development program. Before the program could be created we had to answer several questions. What do we want a Board Member to know? How strong should their Jewish knowledge and practice be? What makes someone a good Board Member? How well should the Board understand the financial structure of the Congregation? What is the overall management and governance experience of existing Board Members?
The answers to these questions were interesting. Some Board members were knowledgeable in the workings of nonprofit organizations and Reform Judaism. Other Board members were not. The difference between the strongest Board member and the weakest one was large. In the future we had to better prepare members to take leadership roles. We concluded that an incoming Board member must actively know about the programs, activities and worship offerings of the temple. They should understand how the temple is managed both programmatically and financially. We believe that if all Board members have a strong basic understanding of the temple, Reform Judaism and the nonprofit governance and management, then they will become more effective. They will act in the interests of the Congregation and within the mission and vision of both lay leaders and clergy.

A basic curriculum was developed to teach the essential information we believe a Board member should possess. The curriculum includes: 1) Reform Jewish knowledge, practice and worship; 2) current temple activities and programs; 3) financial management; 4) general nonprofit management and governance; and 5) the San Francisco Jewish community.

The Executive Committee of the Board approved the curriculum as written by the Executive Director and Senior Rabbi. The first year, members were invited to participate in the new Leadership Emanu-El Program. The second year, an application process was created. The goal is to develop a leadership class of 18-20 members each year. Leadership Emanu-El is held monthly, on Friday afternoons, for three hours just prior to our 5:30 pm Shabbat Services. The program lasts ten months. The sessions are led by the rabbis, temple staff and outside speakers from the UAHC, Hebrew Union College-Jewish Institute of Religion and the broader Jewish community.

**Conclusion**

Now we have begun to create a pool of leadership talent. We have established a program for which members want to be chosen. The excitement surrounding the Leadership Emanu-El program is spreading throughout the congregation. We now have a clear path to leadership. If someone wants to be a committee chair or a Board member, we can now say that Leadership Emanu-El is a prerequisite. Since the program takes only 18-20 members each year, it is perceived as an honor to be accepted. The program has taken on a mystique of its own. The result is that three of our fifteen Board members are graduates of the Leadership Emanu-El program.

Not every future Board member will go through the program. Obvious exceptions will present themselves, such as the experienced corporate executive or the seasoned member who has served elsewhere with distinction, who now turn their interests to the synagogue.

The Leadership Emanu-El program demonstrates that when a member commits ten months to learning to be a good Board member, that in fact they are better prepared and more excited about Board service when finally elected.

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**Leadership Emanu-El Program Curriculum**

**Session 1 “The Nature of Leadership” - Introduction to Leadership Emanu-El Program**

**Speaker:** Stuart B. Aronoff, President, The Congregation Emanu-El

Stephen S. Pearce, Senior Rabbi

Helen T. Cohn, Associate Rabbi

Gary S. Cohn, FTA, Executive Director

**Reading**


**Other Sources:** Carver, John, “Boards That Make a Difference”


**Session 2 History of Reform Judaism**

**Speaker:** Dr. David Ellenson, Hebrew Union College-Jewish Institute of Religion, Los Angeles

**Reading**

Rosenthal, Gilbert S., “The Movement for Jewish Reform”

**Material:** (Behrman House Inc., 1978)

**Other Sources:**


Plaut, W. Gunther, “The Rise of Reform”

Geiger, Abraham, “Abraham Geiger and Liberal Judaism”

**Session 3 Reform Judaism - Beliefs and Practices**

**Speakers:** Helen T. Cohn, Associate Rabbi

Stephen S. Pearce, Senior Rabbi
Reading: Rosenthal, Gilbert S., "Reform Judaism: Beliefs and Practices"
Material: (Behrman House Inc., 1978)
Other: Greenberg, Irving, S. "The Jewish Way"
Sources: (Simon & Schuster, 1988)

Session 4 Financial Management, Fundraising and Budgeting
Speaker: Gary S. Cohn, FTA Executive Director, Congregation Emanu-El
Treasurer, National Association of Temple Administrators (NATA)
Terri Forman, Development Director, Congregation Emanu-El
Reading: Howe, Fisher, "The Board Member's Guide to Fundraising"
Material: (Jossey-Bass Publishers, 1991)
Other: Grace, Kay Sprinkel, "Beyond Fundraising"
Sources: (John Wiley & Sons, Inc., New York, 1997)

Session 5 Synagogue Governance and Management
Speaker: Stephen E. Breuer, Executive Director, Wilshire Blvd. Temple,
Immediate Past President of National Association of Temple Administrators (NATA)
Reading: Ingram, Richard T., "Ten Basic Responsibilities of Nonprofit Boards"
Material: Chaffee, Paul, "Accountable Leadership: Resources for Worshipping Communities"
(ChurchCare Publishing, San Francisco, 1997)

Session 6 History of Congregation Emanu-El: An historical background, important rabbis and
their contributions, current course of temple
Speaker: Fred Rosenbaum, Executive Director - Lehrhaus Judaica
Reading: Rosenbaum, Fred, "Architects of Reform"
Material: (The Judah I. Magnes Museum, 1980)

Session 7 Congregation Emanu-El: Current Programs, Activities and Committees
The Membership Process: From First Phone Call to Integration
Youth and Family Programs
Speakers: Peretz Wolf-Pruscan, Rabbi/Educator
Jackie Levi, Membership Director
Gary S. Cohn, FTA, Executive Director
Reading: Youth Education Program Guide, "How to Work With Committees"
Material:
Other: Hirzy, Ellen Cochran, “Nonprofit Board Committees”
Sources: Chait, Richard P., "How To Help Your Board Govern More and Manage Less"

Session 8 San Francisco Jewish Community
Speakers: Wayne Feinstein, Executive Vice President, Jewish Community Federation of San Francisco
Anita Friedman, Executive Director, Jewish Family and Children Services
Reading: to be determined
Material: to be determined

Session 9 Union of American Hebrew Congregations (UAHC): A discussion of the mission,
programs and activities of the Reform Movement
Review of the Leadership Emanu-El Program
Speaker: Rabbi Michael Berk, Regional Director, UAHC Northern California Council
Gary S. Cohn, FTA, Executive Director

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Building Leadership to Build Your Congregation’s Future

Dale Glasser, M.S., M.A.J.C.S., MSW, Director, UAHC Ida and Howard Wilkoff Department of Synagogue Management

Being a congregational leader is potentially one of the most fulfilling and rewarding experiences which await participants in congregational life. At the same time, one of the greatest challenges facing many synagogues today is the recruitment, development, training, and maintenance of congregational leaders. We can look to our tradition for examples of great leaders, effective leadership styles, and leadership challenges from the ancient days of Judah Maccabee to modern day heroes like David Ben Gurion and Golda Meir.

Even Moses, among the greatest of Jewish leaders, could not lead his “congregation” by himself.

In Numbers 11:16-18, God understands the loneliness and burden of Moses’ leadership role, and the importance of preparing future leaders: “Then the Lord said to Moses, “Gather for Me seventy of Israel’s elders... and bring them to the Tent of Meeting and let them take their place with you...and I will draw upon the spirit that is on you and put it upon them; they will share the burden of the people with you, and you shall not bear it alone. And say to the people: Be ready for tomorrow...”

The National Center for Nonprofit Boards suggests that this process is still relevant today, by outlining a four-step procedure to meet leadership needs which includes identification, recruitment, orientation, and renewal.

As current leaders consider the future of the congregation, they should identify both the characteristics (age, gender, economic background, geography), and skills or experiences (marketing, community activities, knowledge of the congregation).

Once potential leaders are identified, congregations should consider appropriate ways to cultivate and recruit strong candidates. A nominating committee might consider strategies for identifying priorities for new leadership, clarifying what information about the temple to share with prospective leaders, cultivating potential leaders’ interest and commitment, and determining the appropriate person to extend the invitation to serve.

When new leaders have agreed to serve, it is the responsibility of current staff and lay leadership to help new leaders feel welcome and ready to serve through an orientation process. Useful orientation planning includes identifying what basic information does a Board member need; how will that information be shared; and who has the principal responsibility to provide the orientation? This is also the appropriate time to share job descriptions and expectations of temple leaders.

A critical phase of leadership development is ongoing education and renewal. While these parts of the process are often overlooked, they are important not only to maintain current leadership, but as incentives for recruiting future leaders. This phase of leadership development can include: rewarding good Board service, creating opportunities for Board members to grow Jewishly, and to learn more about the congregation, and refreshing Board member commitment through reassessing governance practices and congregational goals.

While each congregation is unique, there are enough shared characteristics in their leadership struggles that learning from other congregations is often useful.

The UAHC Ida and Howard Wilkoff Department of Synagogue Management collects information from Reform congregations throughout the country, and provides leadership assistance in the following ways:

- Offering trained leadership facilitators to work with temple leaders to plan and implement a one-day leadership training workshop based on your congregation’s needs
- Sharing resource files on successful leadership development programs in other congregations
- Providing examples of Board manuals from other congregations
- Making available multiple copies of publications, including Trusteeship In A Great Tradition and Improving Synagogue Board Performance
- Consulting with congregations on their individual leadership development needs

Each of these resources is available to UAHC member congregations at no additional charge, as a benefit of UAHC membership.

By combining the best of current leadership practices with insights from ancient Jewish tradition, synagogue leaders of today can use the lessons of yesterday to build the knowledgeable and dedicated synagogue leaders of tomorrow.
Creating a Staff Ketubah: A Successful Staff Relationship

Dr. Alan Karpe, FTA, Executive Director, Temple Judea, Tarzana, CA

This past year has been one of transition at Temple Judea, beginning with the promotion of Donald Goor to Senior Rabbi and the addition of a new Assistant Rabbi, Brian Zachary Mayer, and a new Cantor, Susan Caro Dropkin. The dynamics and personalities of our senior staff were changing following ten years as a close collegial team and extended family. Bruce Raff, the Director of Education, and I wondered how we would be impacted. Would we still eat lunch together each day? Would we still anticipate one another’s thoughts? Could we continue to order lunch for one another—the important things in Temple life?!

We were even more apprehensive when Rabbi Goor organized a two-day Staff Retreat away from the Temple at the Steve Breuer Conference Center in Malibu, right before the High Holy Days, no less!

We were fortunate that we were joined by a superb facilitator, Catherine Wagor of Creative Team Solutions. Our first task was to write down all the reasons we should be working at our desks and what we could be accomplishing instead of being at the conference center. We were then instructed to put the lists in our pockets and forget about them.

For the next two and one-half days, we completed a series of activities which were designed for staff relationship training. At the conclusion of each activity, Catherine helped us to evaluate them and observed how we reacted individually and collectively to the assigned task.

One of the first activities was the building of a structure using Legos. The planning, sharing of responsibilities, and execution of the project—all timed—began our working relationship. We analyzed the level of participation, the level of suggestions for the planning, and the involvement with the structure, as well as the strength of the final product.

Another exercise consisted of a survival game where the staff was involved in a plane crash and was left with 15 items. We were asked to create a survival plan, with unanimous approval. Catherine analyzed our whole process. Afterwards, she told us the Red Cross recommended survival solution.

At this point in our retreat, I personally started to become a more active participant. (Could it have been because I was the only one to prioritize our survival correctly?) None of us dominated the process, and we learned to take the time to plan, think, react, and listen to one another. We were beginning to respond and respect even the slightest suggestion. Catherine, however, began to tell us the plans for the next day which would consist of spending the day on the famous ropes course. Some of us did not sleep that night.

The next morning looked promising—some uneaten breakfasts due to nervousness—but... We were directed to the outside area and to our course leader, Todd Cobin. It was important with each hurdle that we set our own goals and support one another. We had to take into account our sizes, weights, and abilities and, therefore, plan our “attack.” We were again learning that the task was important, but by far, the planning and execution were the most important aspects of the exercises.

Our final exercise was the dreaded “ropes course.” With the aid of a harness, each of us climbed a ladder where we encountered a suspended rope and an additional crossing rope. The safety of the harness was not comforting. Individually, we had to decide upon our goal. For some, it was just climbing the ladder! Once the goal was determined, we supported one another, and often our comments were revealing in themselves. The Cantor, our only female, was the first to cross the ropes—so much for our male chauvinism! Again, the analysis of the whole process was so important; equally important was the discussion about our individual goal setting and our sense of accomplishment. We also questioned whether the goals were set for us to compete with one another, or were they really aimed at us individually?

Our evening activity was to create together a document outlining what we had learned. Rabbi Goor suggested a working staff Ketubah. Each of us came up with sayings which aptly described our experiences. These were then creatively written and placed on a large board. It became our Ketubah and working relationship. Some of the principles which guide our relationship now are:

• Collegiality
• Praying and celebrating together
• Sharing ourselves
• Keeping stuff between us cleaned up
• Inclusion of our partners and families
• Enjoying each other as well as the process
• Deferring to and respecting individual spheres of decision
• Commitment to work with congregation and the rest of the staff
• Being attuned to time limits
• Keeping discussion going
• Checking in with each other
• Respect for individual time, needs and reflection
• It doesn’t have to be about business
• Open communication
From Little League to the Majors: How to Recruit, Train and Advance Potential Lay Leaders

Livia Thompson, Executive Director, Central Synagogue, New York, NY

By the time this article is read, it will be late enough in the baseball year for fevered discussions about the pennant races to be well underway. With any luck, the Mets and Yankees will have retained their glorious Spring form, and we will be looking forward to a subway series. Whatever the outcome of the pennant race, however, baseball can also serve as a helpful model for developing lay leadership that can be incorporated successfully into Synagogue life.

Baseball players begin life as children, throwing the ball around and learning, through their peers, their family and their coaches, the rules of the game and the skills needed to play it. In Little Leagues across the country, they see that their efforts are supported by the community and that what they are doing is exciting and challenging. They also begin honing their baseball skills. So, too, Synagogues’ Religious Schools, Youth Groups and other children’s programs create the groundwork for future lay leadership. The role that clergy, the administrator, teachers, and lay leaders have may be crucial in planting a seed for a future president of a congregation. Moreover, the interest shown by the Synagogue community—recognition of children for their participation; modeling leadership, financial and emotional support of parents and the Synagogue; encouragement, applause for a game well played—will all help to reinforce the idea that Synagogue involvement is good. Clearly, for many children, their interest in the Synagogue is with the interactions and with the content and excitement of programs. Indeed, making Synagogue participation a joyous experience is crucial. However, the children’s leadership involvement will provide them with important tools for their potential future as lay leaders.

Training children to become leaders is like pick-up baseball in the school yard. The skills learned varies by individual interest, perseverance and ability. Certain children’s programs, such as youth groups, are especially fertile playing fields. Many coaches dream of the undiscovered talent they will identify and nurture. A parallel in developing Jewish leadership requires adults to make sure that interested children are not overlooked because they are shy, or not as popular, or not as skilled at making their interests known. While the children may simply be having fun or trying to create a congenial community, the very act of deciding what a youth group should do, programmatically, managing expenses and income, fundraising, or being part of a youth advisory committee is training for the future.

Many of these children will become distracted as they become older, go to college and try to find their place in the world, and many will leave their pick-up games behind. There is, after all, life after Little League. Others will continue to play ball, however, in intramural leagues, college teams and in parks and...
ball fields. Skills get honed further, interest is maintained and knowledge enhanced. Similarly, there are ways to provide our children with the means to continue to grow as potential Jewish leaders.

On many college campuses there is a Hillel office or a Jewish Center which reaches out to Jewish students and tries to engage them. Often schools offer courses that may be of particular interest. But, the Synagogue, too, can be proactive during this time to try to maintain ties with this population. E-mail missives from the clergy, goodies packages around the holidays, and visits, if possible, from clergy are all paths for a continued link between the Synagogue and the students and remind the students that the Synagogue cares for them. The Synagogue may also offer special young adult programs and activities. Some may establish a young adults' group which may be a self governing microcosm of the Synagogue world. Just as in the minor leagues, it may quickly become apparent to the lay leadership and professional staff that certain players show potential and should be encouraged to consider a role in the greater Synagogue community.

At the same time, potential leaders come into the system in many different ways, not only as young adults. New members and more seasoned members who may have more time or interest are all potential leaders in the congregation and need to be nurtured. Scouts travel to distant lands to seek the new Hank Aaron or Sandy Koufax. They will follow any lead about a worthwhile prospect and will make sure to reach out to anyone with raw talent. The scouts know that it may be worth it to send someone through the farm teams of the minor leagues to see what they are ultimately capable of achieving as a baseball player.

At the Synagogue, current lay leadership and the professional staff must constantly serve as the scouts for the Synagogue. There is a great deal of leg work and gathering of information to make sure that potential leaders are identified and developed. It is important that a list be kept of individuals who show leadership potential, with notes about their particular skills and interest, and who brought them to the attention of the leadership. Such individuals may be regular service attendees, active committee members, or people who regularly participate in Synagogue life in other ways. Sometimes, it may be necessary to be pro-active and to reach out to people whose talents seem ready to be tapped but who do not come forward.

Once identified, the possible leaders need to be trained about the Synagogue and how it functions. The committee structure in most Synagogues is often the best way to do this. Committee work helps teach individuals about how the Synagogue functions, what the role of volunteers is, and the mechanics of the organization. At the same time, committee work gives the current leadership the time to watch a potential leader to see if this individual has the qualities the Synagogue wants and needs in its leadership. Mentoring by the committee chair, encouragement from current leaders and staff, and good modeling are all important elements in this effort. Some people will never get out of the dugout and may remain as loyal and helpful members of committees for years without advancing further.

If a scout identifies someone as being a potential major leaguer, the individual's path to leadership needs to be refined further. For some, this may mean being asked to chair a special project or committee, or to participate in an ad-hoc committee. The person may be asked to attend special leadership training seminars run by the congregation, or to participate in special Board programs for emerging leaders. Board members may be asked to work closely with someone and to undertake some one-on-one coaching. It is important to remember that the individual being groomed needs to have enthusiasm and the commitment to give the time and energy that is required.

All of these activities serve several purposes. As potential leaders become more involved in Synagogue life and more connected to the current leadership, it is hoped that they will continue to grow and develop their knowledge and their skills. Successful completion of the tasks, running a good committee, working well with the leadership and staff on a project are all signs that the individual may be ready to go to the major leagues and join the Board of Trustees.

Coaching should not stop here, however. The best teams are those that work together on a regular basis, and a Board of Trustees is no different. Board retreats, special sessions in which facilitators may come in to work with the Board on specific issues, ongoing discussions about themselves as leaders of their congregation are all part of the work of the Board. The administrator needs to help make sure that the Board understands the importance of continued training and appreciates the need to constantly work towards developing new leadership.

Unlike baseball, leadership development can be a win/win situation. With the proper nurturing of raw talent, interest and skills, all minor leaguers have a chance to make it to the majors and all teams can win the pennant.

So, let's play ball!
Ode to Leadership
(With Apologies to Walt Whitman)

Jesse B. Harris, Executive Director, Congregation Oheb Shalom, Baltimore, MD

I wrote these lines although I'm no poet
When you've finished the text, I'm sure that you'll know it
Nevertheless what I've got to say
I've tried to relate in a different way

It's the first of July in '98
And the Temple year past has really been great
And now for what's coming let's really prepare
Lest our future bring us despair

I'll sit in my office writing this thought
And hoping this gem won't go for naught
We must train our leaders to do what is right
Then I think we'll all sleep better at night

"Lead or follow or get out of the way"
These are the things I've heard some say
But then there are those who want to learn
To lead a group when it's their turn

Some are born ready to lead
They wrote the book we all can read
But most of us learn the things that matter
As we take each step up through the ladder

And when we reach the highest ring
We'll be secure in what we bring
Knowledge, commitment, the need to persist
We may not finish, but we won't desist

Here is Step One of what you must do
Commit yourself to being a Jew
Attend Shabbat on a regular basis
For the Jewish People it's like an oasis

Take a course and study the Torah
Learn the meaning of the menorah
Read some Talmud but wherever you start
Set those words upon your heart

For the Talmudic approach to studying things
There's much to be said for the comfort it brings
And the Pirke Avot in a classical sense
What marvelous wisdom it seeks to dispense

The study of Pesach and Succot will merit
So will Yom Kippur and Shemini Atzeret
As you read our history, heed well this instruction
Many there were who wished our destruction

And you might study Purim with similar views
For Haman was bent on destroying the Jews
But alas for his kind, we're still on this earth
With Torah and Mitzvot and all that they're worth

Learn to read Hebrew by taking a course
The knowledge you gather is never a loss
Remember Tzedakah and its meaning to you
And Tikkun Olam which is what you must do

Now I've preached what I can and told a good story
The role you'll play is the next category
And when you agree what I said to be true
You may be ready for step number two

You may be asked to chair a committee
Accept the challenge and try to stay witty
Some of those folks will be your tutorial
They've served the committee since time immemorial

There are others who serve who may be a faction
Let them speak their minds to remove this distraction
And others may miss a meeting or two
Still, let them know they're important to you

The choices may vary, be they Worship or Grounds
But don't stay the challenge, as hard as it sounds
Or maybe it's Membership and each little facet
In something like that you can be a real asset

Or perhaps Ad Hoc is more to your liking
Enhanced by the thought that the project is striking
Or maybe a Special Committee will do
Lost in the shuffle until there was you

No matter the task, be it small or large
Remember you're the one that's in charge
Be always prepared as the Scouts tend to say
The agenda you've written will help pave the way
Pay special heed to all who attend
And set a time for the meeting to end
And while you are leading give each one a chance
To express an opinion, an idea to enhance

Each way that you serve will add to your knowledge
They never taught these things in college
And when you think you’ve reached that state
Maybe it’s time to graduate

And if you’re successful in chairing a group
You may be considered to be in the loop
And when next they meet to nominate
Perhaps your name will be on the slate

They’ll think quite hard when it comes to you
And evaluate the things that you do
And they may conclude that you’re well trained
That what you’ve been taught has been deeply ingrained

But amidst all the action, a genuine flurry
In picking their leaders they’ll be in no hurry
They’ll look for advice and think what is best
Their process of choosing takes care of the rest

Know in accepting a leadership role
It takes some insight and a search of your soul
It also takes time, more than you know
So you’d better decide if this is your show

Now as President, you’ve earned the title
Each thing you do seems even more vital
The roof needs repairing, the parking lot faster
And the cooling tower is a major disaster

And as those contract talks come near
You may regret you’re a volunteer
But stay the course that you select
Only then do you earn respect

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When your term of office is finished for now
A time for res You may want to allow
But don’t be a leader who when it is done
Can only think of how fast you can run

Let those who succeed you know if they need
Your advice and consult they still can heed
And when you look back, what else can you say
You did what was best and did it your way

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Consulting and Placement Service

The National Association of Temple Administrators offers a consulting and placement service
for Reform congregations.

Liz Hirsch, from Congregation Beth Or in Spring House PA, is chair of the Placement Committee.
She can be reached at (215) 646-5806. Her committee, along with Henry Fruhauf, Placement Director,
will assist you should you need an administrator for your temple.

Mark Greenstein, from Washington Hebrew Congregation in Washington, D.C.,
is chair of the Consulting Service. He can be reached at (202) 362-7100.

Each UAHC region has a consulting and placement person
assigned to assist member congregations in their region.
Please feel free to contact Liz, Mark, or your regional director should you need assistance.