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From the Editor

Janice Rosenblatt, FTA, Executive Director, Temple Beth Ami, Rockville, MD

On behalf of the Editorial Board, I am excited to bring you this special issue of the NATA Journal. In it we are recreating through articles the best workshops from the 2000 NATA Convention. These articles include such topics as those elements you must include in your employee personnel manual to protect your congregation from lawsuits, the administrator’s role in change, making the volunteer position a sought after one, and assuring a smooth running facility.

Our colleague, Joe Boston, now retired, has provided us with an outside approach to Strategic Planning, one that encourages us to look outward as well as inward when planning the future. Gary Cohn, FTA, and Steve Breuer, created a wonderful list on successful congregational management, one from which we can all benefit.

Often, in the course of our hectic days to day professional lives, we forget to stop and recognize how much we do as individuals for our congregations, our communities and Judaism. Recipients of NATA Awards over the past five years are highlights. Pat yourselves on the back; you deserve it!

This will be the last issue of the NATA Journal of which I will be editor. I hope you have enjoyed the issues and the innovations. It has been a great experience and I look forward to working with the next editor, I also want to thank Fern Kamen for her leadership, her wisdom, and her compassion during her years as NATA President. I look forward to working with her as she continues as a NATA leader. I wish an enjoyable and successful presidency to Elizabeth Hirsh and look forward to a wonderful association as NATA colleagues.

From the President

Fern Kamen, FTA, Executive Director, Temple Jeremiah, Northfield, IL, NATA President

In December, I will be completing four years as president of NATA. It has truly been the greatest honor and joy of my professional life.

To succeed, our organization absolutely requires the input and cooperation of many, many different people. I have been privileged to have had a dedicated and close working relationship with our officers, past presidents, board, and association manager. Their commitment to NATA has made it possible for us to accomplish our goals in a highly effective and professional manner.

When I began my presidency, I made a commitment to increasing the number of FTA’s and Senior Members, as well as to providing opportunities for education to new NATA members and existing NATA members. Today, we have the highest number of Seniors and FTA’s in the history of our organization and we have implemented pathways for continued growth.

Since I joined NATA more than 20 years ago, I have felt that our relationship and participation with our Jewish community was of primary importance. Today, our representation on UAHC commissions and committees has continued to expand. Our organization is being actively sought for participation in a wide variety of roles. Our partnership with the Office of Synagogue Management has developed into a true working partnership. The value and importance of our experience in the area of synagogue management has been increasingly recognized and respected within our movement.

I’m truly proud of the new sense of communication among all of our colleagues. There is a new sense of empowerment among our membership that encourages open and

(Continued on page 9)
There are two distinct meanings to the word “agent.” An agent may be an individual asked to perform on behalf of another entity. Or, an agent may be that entity whose efforts or effects result in a change. As temple administrators, we find ourselves actualizing both of these definitions.

As synagogue professionals, we are interested in constant positive changes to improve our congregations. We are concerned with such diverse areas as dues policy and collection, facilities use, maintenance, security, parking, employee benefits and Board development. Through our involvement in NATA, and our study of nonprofit management, we introduce to the agenda of our synagogue both issues and proposed solutions for the consideration of our lay leadership. After decisions are made, we are asked to implement and interpret changes in policy and procedures to members and staff.

There is a natural resistance to change, a quite normal propensity to maintain the familiar and follow precedent. In her excellent new book, The Change Monster (Crown Business, New York, 2001), Jeanie Daniel Duck addresses the challenge of change in humanistic as well as organizational terms. She writes, “We know that organizations must continuously change in order to survive and prosper. But they have to change in ways that bring strength and exhilaration, rather than debilitation and distress.”

Any change may represent threatening aspects of the new and the unfamiliar. Our clergy are looked to for suggestions of new ideas for programs or in liturgy. But advocating change in policy or practice may be an unsettling role for the administrator. As the chief operating officer of the congregation, he or she may be most comfortable in administering established procedures. Therefore, the process and politics of change may be personally alarming.

The purpose of this paper is to make colleagues comfortable and confident in the initiation, enunciation, interpretation and implementation of changes within the synagogues we manage. The following points are practical reminders, not encyclopedic in intent, but rather emphasizing realism and process.

1. Remember who you are and from whom you receive your authority. Then speak only within that authority, not beyond it. Make certain that those who give you that authority are not taken by surprise.

The synagogue administrator is an agent and employee of the congregation’s Board of Trustees. That Board represents ownership. Although the individuals on the Board change from year to year, as do the officers, the Board survives both professionals and laity as “owners” of the congregation. The Board has the ultimate decision-making and fiduciary responsibility.

Confusion occurs when an administrator - or rabbi - fails to remember the source of his or her authority and acts as if he/she was the independent owner or operator. While the rabbi and the administrator may be seen as chief executive and chief operating officers, respectively, it is in his or her personal interest to act only within congregational precedents, policies and budgets. When any of these are affected, the Board must be involved and its approval sought.

2. The administrator may be the source of potential change, having brought back ideas from conferences, classes or colleagues. Pass the suggestion to the appropriate lay leader, who then becomes the primary advocate of the idea. That leader may or may not credit you. Live with it.

The art of providing professional leadership to a volunteer-run organization is the empowerment of the volunteers. Share a new idea with the appropriate lay leader. Allow that individual to carry forward the concept, with the administrator in a supporting role, providing appropriate data, budgetary analysis and scheduling. Manage the approval process, bringing aboard the Rabbi, President, Executive Committee and Board in the manner consistent with the tradition and culture of the congregation.

The success of an idea - the actualization of a fund
raiser or a building project or a change in dues collection - may result from the work of the administrator, but should always be credited to the lay leader who brought the concept forward. In turn, that individual may or may not acknowledge its origins or the administrator’s contribution. The effective professional has the satisfaction of getting it done to the credit of his/her volunteer leaders.

3. Be prepared. Don’t bluff. Write proposed policies or procedures down and get approval of the document. Don’t rely on verbal explanations.

The spoken word is for emotion; the written word is for effectiveness. Board members do not live with congregational operations on the day-to-day basis as we professionals do. In order to help them understand new concepts, get them down on paper in a clear and succinct manner. Describe the existing situation before describing the new.

One significant benefit is that a motion on accepting the new concept can refer to the document, rather than demand a long, complex verbal description. Most well written material is accepted by volunteer Boards when it is easily comprehended.

4. Be prepared. Cite statistics. Prepare accurate calculations as to the effect of your suggestions. Cite external authorities (GAAP, law, comparable synagogues).

The administrator is the only individual who can abstract statistically from congregational history. The information is at hand. Tracing the demographic changes, the rate of dues increase and collections, school enrollments and maintenance costs, can result in valuable support materials. A pro forma as to the financial implication of any new concept, including the sources of funding, is expected by an experienced Board in its fiduciary role.

Suggestions for and samples of new ideas may come from colleagues or professional literature. Rulings and procedural recommendations may come from accountants, lawyers, or government agencies. No one but the administrator is in a position to gather all the supportive information.

5. Don’t be the agent of personnel change involving clergy or professional colleagues. Make personnel decisions involving your subordinates within policies previously approved by the congregation’s Board. Do not speak or act on behalf of any leader who is unwilling to speak for him/herself.

Personnel changes represent organizational minefields. Personnel processes should have the full support of the Board, with access to advice from a labor attorney. The administrator is responsible for insuring that a complete employee file exists for all staff members, including job description, contract where applicable, evaluations, any notes regarding job performance or discipline and a complete compensation record. These, along with the congregation’s personnel policy manual, should be the tools used in decision making.

As protector of good process, the administrator should make certain that policies and legal requirements are followed. The administrator should never be involved in the evaluation of clergy, and seldom in the evaluation of professional staff (e.g. educator, program director) who are not directly responsible to him/her. The administrator should not speak or act on behalf of clergy or lay persons who are unwilling to be forthright in addressing a personnel problem.

Certainly, the administrator is expected to hire, compensate, evaluate and terminate the personnel who are accountable to him or her, in accordance with the policies of the institution and in conformity with labor laws of the state.

6. Don’t advocate changes that will benefit you personally. Have someone else be your agent.

7. Make certain that the “key players” support the change you advocate. Provide them with information; co-opt them into the process. Do not go forward until there is consensus or support among the leadership. Never “go around” a relevant committee chair.

One way of creating an opponent to a new idea is by circumventing a key individual, one who might not be supportive. “Bulldozing” such persons by outvoting them at a Board meeting may create an adversary or negative bloc for the next issue. It is better to build support by including all the relevant players. (Don’t forget the Treasurer). Share with all Board members that a specific idea is under study which will be brought to the Board for consideration before it will be asked for approval. Avoid surprises!

8. When consensus is not achieved, carry the issue over to a subsequent meeting, giving time for additional research, adjustments, and lobbying.

Folk wisdom teaches us that the only thing that cannot be reversed is death. Nothing a Temple Board considers is a “life-or-death” matter. An issue can be revisited at a later date, in a new format, in a more favorable political climate or by new leadership.

9. Make certain the appropriate people are in the room; e.g., Don’t attempt to change financial policies without the presence of the treasurer and the chairs of financial committees, even though they have previously indicated support. It’s worth waiting until they are present.
The participation of a maximum number of Board members in the voting process for a major change empowers them, individually and collectively; they “own” the decision. A majority decision tends to negate that individual who says, “It’s not my fault - I wasn’t there when they...”

10. Act as manager of the process. Have key documents such as bylaws, budgets, and appropriate minutes at hand.

Make certain that changes are in line with formulated notice, voting timelines, and precedent making actions of the Board.

11. Make certain all significant changes are written into the minutes, the procedure or policy book, or into a memorandum. Identify the body making the decision and the date of decision.

Minutes of large businesses are business-like. They are remarkably brief. Good minutes include a careful list of attendance and action items (things voted on) only. They do not include discussion, though they may indicate subjects for future consideration (new business). If our Temple Board minutes are clear and focused, they provide a useful reference. If not, many congregations keep a “policy book,” for easier reference.

12. Know where records of policy decisions are kept. Minutes are usually not indexed, and reading months of minutes, guessing at which meeting a decision was made, can be an onerous and frustrating task.

Now, a few pieces of personal advice to administrator colleagues:

13. Do not carry the argument. Lay leaders listen first to other lay leaders. Respond to questions knowledgeably and with advocacy, but always as management.

14. Secure the support of your rabbi(s). Never surprise your rabbi(s) and try to avoid being surprised by their unanticipated comments.

15. Don’t celebrate victory if the decision comes out the way you wish in a conflicted situation. The losers remember...and not always at times of our choosing.

16. D.T.I.P. Don’t Take It Personally if the outcome is other than you desire. If you’ve observed the caveats so far, there’s always another opportunity. Remember that you are only the manager, not the owner. It is theirs.

Within these guidelines, the administrator can have remarkably far-reaching effect on the congregation he or she directs. Successful colleagues are those who point with pride to what has been accomplished during their terms as administrator, through the remarkable partnership our profession has with our clergy and volunteer leaders.
Some Basic Principles of Congressional Management

Stephen E. Breuer, Executive Director, Wilshire Boulevard Temple, Los Angeles, CA
Gary S. Cohn, FTA, Executive Director, Congregation Emanuel, San Francisco, CA

1. The Temple Board operates with the full recognition of its role, representing legal ownership of and responsibility for the congregation.

2. The Temple President, Rabbi and Executive Director mutually support one another, respecting their individual roles and responsibilities.

3. The Temple President, Rabbi and Executive Director meet together regularly to discuss and coordinate the business of the congregation.

4. The Temple Board operates in an orderly manner, regulated by its bylaws, following prescribed rules of order, keeping careful records of its decisions and monitoring the implementation of these decisions.

5. Committees of the Temple Board operate pursuant to written goals and authorities established by the Board, and report to the Board.

6. All employees are hired and evaluated according to previously established job descriptions, indicating their responsibilities as well as lines of authority and accountability.

7. Financial operations of the congregation are conducted according to generally accepted accounting practices, with current status reported regularly to the Board, and reviewed annually by independent professionals.

8. Fund raising activities on behalf of the congregation should comply with the ethics and standards issued by the National Society of Fund Raising Executives (NSFRE). All funds raised are used solely for the purposes for which they were solicited and contributed.

9. The congregation and its employees are bound by policies enumerated in the congregation’s employee handbook, with all exceptions explicitly defined in individual contracts.

10. Public statements and publicity representing the congregation are made in conformity with policies established by the Board, and only by authorized individuals.

11. Policies regarding the use of facilities and real property are published as established by the Temple Board.

12. Membership, dues, program fees, dues relief, scholarships and all other financial arrangements follow policies, guidelines and authorities mandated by the Board.

13. Board member responsibilities are provided to Board members in writing, along with standards for Board/professional relationships and conflict of interest policies.

14. Policies are recorded in written form and are easily accessed for reference.

15. The annual budget is approved by the Board and remains unchanged and unchangeable except by Board action or within parameters set forth by the Board.

16. The Board is responsible for strategic (long-range) planning and the implementation of the plans, as an on-going process.

17. The mission statement of the synagogue, as well as the goals and expected outcomes, are developed and monitored by the Board.

18. Clergy and professional staff understand the traditions, values, expectations and goals of the congregation, and represent them in their interaction with congregants, community, and with one another.

207 subscribers on NATA-SCHM00ZE sent 9,039 e-mail messages of information, ideas and support.
How to Design a Volunteer Program

1. **Define why you need volunteers.** Every volunteer program must begin with an understanding of why your organization wants or needs volunteer support. At the initial stage it is also essential to establish desired outcomes for volunteer involvement. Establishing these outcome objectives early in the process will help to guide the types of volunteers that you recruit, and the way that you manage them once they have come on board.

2. **Design valuable volunteer opportunities.** By designing valuable volunteer assignments, you provide volunteers with challenge and motivation for continued success. Lay out the responsibilities of each job. Plan training and support programs to foster volunteer learning and development, and ensure that volunteers are aware of the goals and outcome objectives for their involvement.

3. **Recruit carefully.** When you’ve designed your volunteer opportunities, target the appropriate audiences to recruit those who are truly interested in the project. Understand the characteristics of your existing team, and recruit volunteers to mirror this team. Be honest about the workload and time commitment involved in the project. Above all, ask for help but don’t plead - you want volunteers who want to be there.

4. **Screen, interview and place cautiously.** Screening and interviewing potential volunteers facilitates their commitment to the temple or project at hand. It shows potential volunteers that you take both the project and their time seriously. Screening also gives you an opportunity to match qualifications and skills with your needs and the needs of your volunteers.

5. **Train staff to be more successful working with volunteers.** Remind staff of their own commitment to the vision of the organization. Demonstrate how volunteers can support their goals and work as partners with them in strengthening their position.

6. **Bring volunteers on board with training.** Comprehensive orientation and volunteer training programs give volunteers a feeling of belonging and status. It shows that your synagogue values them enough to make an investment in them and, again, helps to reinforce their commitment to the cause. Orientation also helps set the tone of the work area and allows volunteers to adapt more easily to the organization’s surroundings.

7. **Recognize, recognize, recognize.** Recognition programs show that your organization values volunteer support. They also provide motivation for continuing commitment from your volunteers. Recognition should be both formal and informal, with events supported by the temple, as well as personal notes and communication.

8. **Follow-up effectively.** A final element of a successful volunteer program is continual follow-up and evaluation. Effective follow-up provides feedback to volunteers and staff and opportunities to improve service to both. With a careful plan, and continual volunteer communication and training, it should be easy to evaluate your success and improve your program with time.

How do you identify meaningful volunteer opportunities in your synagogue?

A. Staff Assistance request. Requests directly from staff for assistance with **regular duties**, both short-term and long-term.

B. Project development request. Requests from Board of Directors and committees for use with **specific programs**. Tasks are outlined and distributed to both paid staff and volunteers.
Communicate Tasks to Your Congregants

**Written Volunteer Position Descriptions:** Outline the work that needs to be done by the volunteer. An incredibly useful tool, the description forms the basis for your recruitment effort, because it defines the assignment, skills, abilities and interest necessary to perform the task successfully.

1. **Position Title.** Gives the volunteer a sense of identity and helps the paid staff understand the assigned role.

2. **Work Location.** States the location that the individual will be working whether it is onsite or at home.

3. **Volunteer Impact.** The purpose of the overall project or program and how the volunteer's work will impact the project's outcome or mission.

4. **Responsibilities and Duties.** List responsibilities and duties that are specific, and clearly define what the volunteer is expected to do on the assignment.

5. **Qualifications.** Be clear and concise. List qualifications required for the position. Include education, personal characteristics, skills, abilities and experience required.

6. **Commitment Required.** List minimum length of service, hours per week and any other special requirements.

7. **Training.** Indicate nature and length of all general and position-specific training required for the assignment.

8. **Volunteer Supervisor and Contact Information.** Whom to call for more information about the opportunity.

Prepare a Volunteer Handbook

Welcome from President, Rabbi, Executive Director Mission Statement of the synagogue Organization Chart and roster of board with titles Organization Chart and roster of staff with titles Descriptions of temple programs and activities Mission Statement of the volunteer program Benefits of volunteering in organization Volunteer position descriptions Volunteer policies and procedures Contact information Roster of volunteers

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**NATA-SCHMOOZE @shamash.org**

...a familiar e-mail address for those of us who subscribe to it. On it we find a place to ask questions and the answers to our questions. It's a place to turn for support and guidance, to say hello and goodbye, and to learn from and share with one another.

This e-mail discussion group is limited to regular, senior and courtesy members of NATA who are currently serving as Temple Administrators in Temples or Synagogues on a full or part time basis.

Subscriber information can be found at http://fj.org/nata/schmooze.html. For more information about NATA-SCHMOOZE, contact: Eli Montague, FTA, at eli@ti-stl.org.

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**From the President**

*(continued from page 3)*

productive dialogue among all of us. The realization that each of us has something valuable to contribute to the organization has strengthened us as individuals and enriched NATA as a cohesive body.

Personally, the past four years have been made up of high and low points. I have felt love and support from my friends within NATA and from the group itself. And this has enriched the highs and helped me through the lows. My heartfelt thanks to all of my colleagues and friends who have been with me throughout this time.

When Liz Hirsch begins her presidency in Boston, she will inherit an organization that has gained strength in the last four years, and will continue to grow even richer under her guidance and leadership. I wish her success and joy, and as much fun as I have had.
Calendar Procedures: The Key to a Smooth Running Facility

Susanne Geshekter, Executive Director
Temple Emanu-El, San Diego, CA

“Keeping a master calendar current is like doing laundry — in order to catch up you must stand in front of the washing machine without clothes! We are the caretakers of the work in progress.”

The success of the synagogue and its strength can be measured in many ways. It could be the dynamic role of the Rabbi, the beauty of the physical plant, the educational programs, and even the availability of the facility to all congregants, its committees and the Jewish community at large. The synagogue is there for all to use. As Executive Directors/Administrators, we are the caretakers of these facilities, as we engineer and establish the priorities for use within a framework that is carefully structured.

In order to keep the facility running smoothly, each congregation should establish a master Temple calendar to adhere to its chosen priorities. This will also make sure the synagogue facility is used in a structured and calculated way. When creating a calendaring procedure, one must outline the structure by order of importance or priority.

Fixed Congregational Activities Have First Priority

These activities include worship, Religious/Hebrew School, Preschool, youth and life cycle events. These events are for the most part staff-driven and need to be calendared at a preliminary staff meeting. The majority of these fixed events and programs are based on the Hebrew calendar or secular calendar and therefore can be calendared by staff and leadership with a long-range plan in mind. In some larger congregations, fixed events are prioritized within a two to five year plan.

After a preliminary calendar is set, a specific time is set to meet with committee chairs to determine priorities for programming and meetings which have been established by the committees. In order to avoid double calendarizing and conflicts with key participants, ALL events, whether within the facility walls or in someone’s home, should be calendared.

Who is in Charge?

It is essential that one person be designated as the responsible person for entering data, taking information and deleting data. All events MUST be cleared through this person in order to create continuity in the development of the Master Calendar. Preferably, all dates are accepted are in written form, i.e. a form, or form letter. It is wise not to accept dates over the phone or in passing conversation. This will avoid misunderstandings of time, date, nature or size of an event. Acceptance of dates) must be confirmed in writing as well. It can be as easy as initialing the form and sending a copy to the person requesting the date. Outside groups can use the facility only after all constituencies have reserved space for the year.

Creative Committee Collaboration is a “Space-Saver”

I have realized that if the administrator can meet with the committees after their programming is set, we can help drive creative collaboration for similar events. For example, several years ago, we realized at our calendar meeting that Social Action, Adult Education and the Seniors Group all wanted a forum on the political elections. We tried the collaborative approach and created a program sponsored by all three committees. Not only does it save space, but the committees share the cost burden of developing and implementing a program. I would suggest that you set one general meeting to actually enter calendar dates and a fol-
low up for creation of collaborating events. I have created a form on the back of the calendar for each month which is given to each committee representative at the first meeting. This form includes the date of the event, a description of the event, and the responsible party for the event - all readily accessible to the administrative staff in charge of the calendar.

Facility Use is Open to All

Facility use is generally granted to any member of the congregation in good standing. Some congregations will open their facility to the general non-profit and Jewish sector of the community. There is generally one person or designated employee to facilitate facility use. In larger congregations it is usually an employee hired for that specific purpose. In smaller congregations, it is usually the administrator’s responsibility or a designated member of the support staff. Whoever it may be, it is very important that this person have direct communication with the calendar coordinator. A contract stating the rules and regulations governing use of the facility should be a requirement. This document should explain room usage, room set up and the fee schedule. When a caterer or outside vendor is involved, you must require that vendor’s Certificate of Insurance. Contracts will vary with congregation’s history, traditions, precedents and needs, and the contract needs to reflect the rules germane to each individual congregation.

Calendar Programs and Usage

After a preliminary survey on NATA Schmooze, I found that a large number of congregations use Microsoft Outlook for their calendaring needs. Outlook has calendaring and e-mail capabilities, and can be integrated with the Palm Pilot, which the majority of administrators use for their individual calendars. Another common program is Calendar Creator Plus. Using this program does require more data entry. Although the more recent versions of this program do integrate with the Palm Pilot, the program does not have e-mail capability at this time. However, it is capable of exporting data to Microsoft Outlook. There are still a number of congregations that use the “Red Book or Manual” method of calendaring. The calendar is kept by one person who collates the information to be put into calendar format.

The NATA/UAHC Temple Management Manual, Section 111. Property Management - offers an excellent comprehensive resource for information on facility use and calendaring procedures. Even though this information was compiled many years ago, it is still germane to the syna-

ogue and property Executive Directors administer.

The Administrator/Executive Director is the caretaker of the responsibilities of calendaring, facility use, and communicating with staff, leadership and the outside community. Each congregation is an individual institution with its own culture, and it is our responsibility to maintain its integrity and structure by using our energy and expertise.

NATA Consulting Services

The NATA consulting service is available to member congregations of the Union of American Hebrew Congregations. NATA represents the combined expertise and experience of hundreds of professional temple administrators. These administrators will respond to your congregation’s needs in the areas you designate.

The consulting fee of up to $750 is waived to UAHC member congregations. Congregations are required only to reimburse for the consultant’s expenses.

Consultations may be requested by completing the form linked to the nata web-page (http://rj.org/nata). The completed form should be returned to the Office of Synagogue Management at the UAHC. The Director will then confer with the NATA leadership to provide the most appropriate consultant(s). The congregational leader indicated on the request form will be contacted to make specific arrangements.

The UAHC has a Department of Synagogue Management that can assist in a variety of ways. Contact them for information about the Manual for Synagogue Management. Also see the UAHC Communicate program for great ideas.

Contact Mark R. Jacobson (at 404-873-1731) or Dale Glasser (in the UAHC office at 212-650-4040) for more information.
Cover Yourself Against Lawsuits: Employee Manuals

Nancy Schneider, Executive Director
Temple Shaaray Tefila, New York, NY

We install security alarms knowing they'll probably never go off. We buy vacation insurance even though we'll likely never use it. The chances that your synagogue will be the target of a lawsuit are similarly slim, but you must nonetheless protect yourself against that possibility by preparing a clearly written and legally acceptable Employee Manual.

Your temple may be a warm, fuzzy, family-type workplace, but it is also a business, one that is usually ill-equipped to defend itself in court. An Employee Manual is your insurance policy against lawsuits.

If your synagogue has at least two non-contractual employees, you need an Employee Manual. Employee Manuals can vary widely, ranging from 6 pages of basic information to 60 pages detailing every conceivable eventuality. Whatever the contents of your manual, a sure way to deter lawsuits is to treat all non-contractual employees equally, with no favoritism. Allowing one employee extra sick days (even for a real illness) can come back to haunt you. Once your Employee Manual is written, make sure you adhere to it; if you disregard your written policies, you will negate all the time, energy and money that went into creating them. It is essential that a labor/employment lawyer from your state be involved in the approval of such a manual before it is issued.

All manuals cover vacations, termination and general policies. But, to prevent employee problems and lawsuits, your Employee Manual should also address:

- sexual harassment;
- personal and sick days; and
- medical leave (including maternity leave)

Sexual Harassment

Many people are uncomfortable dealing with the issue of sexual harassment. The issue is ignored in their manuals, because they believe it will never happen in a synagogue. However, the mere allegation of sexual harassment, whether or not it actually happened, is enough to create a legal problem. A clearly written policy will guide you in handling the accusation in a proper legal manner.

Your policy should state clearly that harassment and coercion are unacceptable and will not be tolerated. Get local legal advice, but make sure to include the following, usually titled Prohibited Behavior—Prohibited behavior includes unsolicited and unwelcome verbal or physical contact that has sexual overtones. List all types of behavior, including visual conduct, offering employment benefits, threatening a reprisal, a sexually suggestive slur or joke, etc.

Remember, sexual harassment is not confined to men targeting women. It is unlawful for anyone to harass another person of the same sex or the opposite sex.

A section titled Complaint Procedures and Investigation should detail to whom the complaint should be reported. More than one person should be designated. All employees, including the professional staff, need to know and understand the process. Describe who will investigate the accusation. (For example, at my temple, the claim must be presented promptly to the Executive Committee of the Board of Trustees for intervention and investigation.)

A section designated Protection Against Retaliation will explain that the employee making a legitimate claim is protected from any adverse employment action.

Finally, the Discipline of Employee section explains the repercussions for violating the policy by engaging in or condoning sexual harassment. The disciplinary action could range from a warning to discharge.

Your sexual harassment policy covers all synagogue employees, no matter whether they are contractual or non-contractual.
Personal and Sick Days

Your Employee Manual must define how many personal and sick days employees are entitled to claim. Your policy can combine personal and sick days into one category, or you might combine vacation, sick and personal days.

If you do not state a specific number of days to which employees are entitled, instead treating each employee separately, the resulting sense of unfairness or favoritism can become a legal issue.

For example, what would you do for a senior maintenance man who will be out of work for 8 weeks following bypass surgery? We have to pay him, many would say, because he’s been there for us for the last 15 years. But, as much as you would like to be compassionate, you cannot pay him his full salary without setting the precedent for every other employee. (You will feel better about adhering to your written policy if your employees are covered for short-term disability, which will replace a part of their income, although usually only a small part, during a long illness.)

Medical Leave

The Federal government’s Family and Medical Leave Act (FMLA) applies to all businesses with more than 50 employees. The FMLA details who is eligible for family or medical leave, what benefits he or she can receive, and in what situations it applies. I recommend that you adopt the FMLA’s guidelines, even if you employ fewer than the required number of employees. By using this government standard, you will:

• decide how to treat all medical leave, including maternity leave;
• treat all employees just as they would be treated in any other business, for-profit or not-for-profit; and
• prevent claims of preferential treatment among employees.

This article addresses policies for non-contractual employees only. Many contractual employees have negotiated different benefits. For example, you may have agreed to pay a contractual employee her full salary during an illness, until her long-term disability policy takes effect. However, contractual employees must follow everything written in the Employee Manual unless their contract states otherwise.

If you would like me to send you sample manuals from synagogues of various sizes, contact me at 212-288-3576 (fax) or nschneider@tstnyc.org (e-mail) with your name and address. Remember, these are only samples. A local labor/employment attorney needs to approve the policies in your Employee Manual because every state’s laws are different.
Strategic Planning That Also Looks Outward

Joseph W. Boston, Former Executive Director
The Temple Congregation B’nai Jehudah, Kansas City, MO

Strategic planning by synagogues should have both an inward focus and an outward focus. The purpose of inward focus is to examine the current dynamic within a synagogue and to correct deficiencies and/or increase productivity. The purpose of outward focus is to determine the external forces that could adversely or beneficially affect a synagogue’s future.

Seldom does the strategic planning of a synagogue include an outward focus to discover those trends within its local Jewish community that will affect its future vitality and viability. Most strategic planning conducted by synagogues focuses inwardly with the aim of achieving an efficiently and effectively operating institution. Most synagogue lay leaders look inward to determine if their synagogues are providing their members worthwhile programs of worship, education, and culture; if they are providing good pastoral care; if they are administering these functions appropriately; and if there is prudent governance that provides both flexibility and limits.

While the more fundamental purpose of synagogue leaders is to promote and sustain Jewish living, their emphasis is on what might be called product, packaging, and delivery of Jewish programs within the synagogue. The leaders of synagogues want their institutions to provide what is needed by their members to live spiritual and ethical Jewish lives. These leaders want members’ expectations satisfied. They want their synagogues to retain their members and to maintain financial soundness. Their focus is inward.

Leadership’s concentration on looking inward is understandable. Members regularly report to their synagogue’s leaders the shortcomings in the synagogue’s administrative and program life. The leaders then react to their members’ concerns. It is not unusual for leaders to hear comments from members similar to “the youth department is under funded” or “the social hall needs refurbishing” or “there are an insufficient number of volunteers for the outreach program” or “why can’t our synagogue create a budget that does not always require members to increase their contributions” or “why do the leaders always seem to come from the same group of members”. Though they are leaders in the synagogue, these people are still volunteers, and they are volunteers who usually give generous financial support, give much of their expertise, and a great deal of their time — time spent in trying to bring resolution to the kinds of questions continually brought before them. In addition to the significant time commitments already given to the synagogue by these leaders, finding investigative time, thinking time, and discussion time for outward focus is difficult considering the busy schedules of those people outside the Temple. But, only looking inward will make the synagogue vulnerable to forces in the future; forces that may cause difficulty that the synagogue may not be to prepared to overcome, or that may provide substantial benefits that the synagogue may not be prepared to receive.

The synagogue needs to establish a sustainable advantage. Simply having a synagogue with good programs, administered efficiently and delivered effectively, is not sufficient to guarantee a synagogue’s long-term viability. Synagogue leaders must scan the environment of the total Jewish community to discover those factors that will determine the kind of synagogues with which Jews will want to affiliate, and those factors that will promote members’ continued affiliation.

If the Jewish population is shifting to a residential area away from where the synagogue is located, even a well-operated synagogue will begin to lose members. If the synagogue is well located within a Jewish residential area, but a neighboring synagogue has a charismatic rabbi, but has an inadequate educational program for children, parents will affiliate with the synagogue where their children will receive a better Jewish education. Many similar examples can be given.

In addition to a synagogue having its house in order, that is, operating efficiently and effectively, its leaders need to look into the community and determine how they can provide a reasonably sustainable advantage for their synagogues over: (a) other local synagogues; (b) the apathy of unaffiliated persons who feel their Jewishness is expressed simply by participation in Jewish agency work to the exclusion of synagogue affiliation; and (c) the disinterest or alienation of those who have no Jewish affiliation.
A synagogue’s leadership’s next important step — after developing operational efficiency and effectiveness — is to develop a strategy to create a sustainable advantage that differentiates their synagogue from the other synagogues and that appeals to, at least, a segment of those who are unaffiliated. That advantage would come from the synagogue having a uniqueness that causes people to want to be members.

It is not being suggested that a synagogue must have an advantage in every program area of synagogue life over other local synagogues. It is suggested that a synagogue must have at least one such advantage or combination of advantages that is sufficiently strong to attract and retain members in sufficient numbers so that the institution will continue to be vital and viable. In a community where there are a number of synagogues, each having a sustainable advantage would benefit the entire local Jewish community. First, it would strengthen synagogues where families could continue their families’ loyalties, feeling they have a synagogue home. Second, with synagogues having different sustainable advantages, there would be available a multiplicity of excellent programs or staff or other benefits to attract the unaffiliated.

The need for a sustainable advantage applies not only to synagogues in communities where there are a number of synagogues, but also to those that are the only ones in their communities. Being the only synagogue in a community can be a significant advantage, but still does not provide assured future viability. Should such a synagogue be seen by a segment of its membership as being inadequate in one or more important program areas or having staff whose conduct is less than desirable, and if no correction of these deficiencies is forthcoming, a movement for the creation of another synagogue can easily arise.

Some may believe that seeking a sustainable advantage is to place the synagogue in a context that is not appropriate. They might say that the synagogue should not be concerned with competitiveness, but rather with spirituality and the perpetuation of the eternal values of Judaism. Those well-meaning persons do not understand that encouraging and sustaining spirituality and Jewish values requires institutions, and institutions do not exist in a vacuum. Institutions exist in a market place filled with many good institutions, each competing for members to promote and sustain its worthy causes. A sustainable advantage can be expressed in a uniqueness of staff programs or location or other quality of the synagogue.

The synagogue’s mission of encouraging and sustaining Jewish living is extremely important, but it is neither unique to an individual synagogue nor will it draw a significant number of the unaffiliated to a particular synagogue. Each synagogue must find its own uniqueness.

Among qualities for uniqueness that may or may not apply to an individual synagogue might be one or more of the following: (a) an unequaled Jewish educational program for children; (b) a comprehensive adult Jewish educational program; (c) a charismatic rabbinical staff; (d) an unequivocally spiritual mode of worship; (e) a Jewish elementary day school; (f) an annual theme unifying all programs; (g) a select location; (h) a socially esteemed group of members; (i) an intensive social justice program; (j) a vitality in its social/recreational programs; (k) an outstanding Jewish preschool; (l) scholarships to fund missions to Israel for all the synagogue’s b’nai mitzvah children; (m) partial payments for expenses incurred in attending UAHC biennial assemblies; (n) scholarships to fund attendance at Jewish summer camps for all the synagogue’s fifth grade children; (o) an exciting program at its own camp or conference center; or (p) some other quality or combination of qualities depending upon the situation in which the temple finds itself. With a percentage of local Jewish population already synagogue affiliated and with a disinterested unaffiliated Jewish population, it is questionable that simply advertising the benefits of belonging to a particular synagogue would be the cause for the retention or increase of its membership. A synagogue’s wanting members is not equivalent to people’s wanting that synagogue.

Developing a desirable uniqueness that provides a sustainable advantage would be crucial to the long-term life of a synagogue. Even when such uniqueness has been developed and is working well, it is important to remember that times change. Therefore, a synagogue must be vigilant as to what is on its community’s horizon that will sooner or later affect the advantage that the synagogue has gained for itself. There may even be situations where a synagogue would even find partnering with another institution gains or preserves an advantage.

Planning that makes possible the retention of members and an increase in the number of members for the purpose of promoting and instilling the truths and values of Judaism brings meaning and redemption to the lives of Jews and brings light to a world so often dimmed by selfishness, bigotry, violence, and poverty.

Hopefully, the number of members of a synagogue can be maintained and even increased, and members would participate in worship and study and social justice activities with greater consistency, and new members would contribute to higher levels than departing members. Membership participatory strength and financial strength are mutually dependent. But, hope is not sufficient to make this happen.

Is there not merit in making a synagogue, in addition to being operationally and financially sound, unique and different from other local synagogues in qualities that will build, long term, the strength of its membership and its finances; thereby promoting its mission!
In The Beginning...

Loree Resnik, FTA, Executive Director
Suburban Temple-Kol Ami, Beachwood, OH

The NATA Membership Committee has taken on an expanded role in the past two years. Always the source of entry into the professional organization, through the completion of an application and dues payment, the Committee now understands it needs to be responsible for all aspects of membership. In our congregations we look at membership as a three-part process: recruitment, integration and retention. In NATA we now understand that we, too, need to deal with all those areas. Our responsibility is an important one. We need to invite colleagues who come into the field to be a part of our professional organization. We need to teach them about the resources available to them both through NATA and the UAHC to help them be successful in our field. We need to work to help them understand the importance of their role in Reform Judaism. We can encourage them to see the role of NATA in their continuing education. We are working on better means of recruitment, through letters to Rabbis and to Temple Presidents encouraging them to help new administrators learn the importance of NATA membership.

We know that many people come into our field from other professions. From business administration, banking, social services, health services administration, education, Jewish communal service, facilities management, event planning, marketing and public relations, our colleagues make the decision to make temple administration their career. Those of us who have been involved in NATA for many years know that all of these work arenas forge skills necessary to our own work, but that we need to help complete the circle and fill in what might be the missing content.

We now begin that education program with the opportunity to work with a mentor, a seasoned NATA member who has honed successful skills and who truly understands the complex dynamics of being a part of the synagogue professional team. These mentors can truly help those new to our work understand the importance of lay leadership, of board development, of fiscal responsibilities, of crisis management and of strategic planning, to name a few. Whether the question is as concrete as catering contracts or as abstract as board politics, these veterans can and have helped.

We now have special programming to integrate newcomers into our convention activities and to help them understand the importance of attending a NATA summer institute, enrolling in pre-convention course work, working toward the certification of Fellow in Temple Administration and accessing the UAHC’s Department of Synagogue Management as an important resource. We disseminate literature that may have been passed out in previous years, but that they may not find in the literature collection of the office in their own congregation. We help them understand how to access NATA.

Schmooze, our list service that allows our members to interact and ask questions electronically.

It is also important that we learn why colleagues leave our field and what causes a turnover rate much higher than we would like. We are developing an exit interview instrument, so that we might understand the answers to these very important questions and develop strategies that help make this career choice a life-long commitment. In this way, NATA membership plays an important role as a partner in addressing the critical shortage of all temple professionals.

We have accomplished much, but there are challenges and opportunities for growth and development and we in NATA membership hope to be up to the task.
Look What Else We Do!

NATA Awards 1996-2000

The National Association of Temple Administrators honors its members' achievements above and beyond job description, within the congregation and the greater community. We are proud of the outstanding individuals who have received these awards in the past five years and of their contributions to Judaism, NATA and their communities.

Myron Schoen Service to Judaism Award

This award is presented to an administrator who has made a contribution well beyond his/her position, through leadership, authorship or involvement.

2000

1. **Monika Hamburger** - She helped her congregation double its property and build its day school. She is a founder of PARDES and now works as the COO of the UAHC – the highest-ranking woman in the Reform Movement. She continues to nurture her NATA colleagues as she broadens the financial base of the UAHC. I know that you have all seen her “behind the scenes” work in the recent publications and changes to the UAHC.

2. **Marlyne Freedman** - She continually reaches out to people to make them feel part of the community. She brings people together to further their Judaism in many ways. She has organized a program called Operation Elijah, to help families welcome others into their homes for Passover; she has organized the Jewish Film Festival in her community and has served as president of the Young Leadership Division of the Jewish Federation of Greater Phoenix.

1999

**Terry Kraus** - She works creatively with MAZON - a Jewish response to hunger – both locally with her congregation and family, and in the wider Jewish community as a board member and Grants Advisory Committee member.

1998

**Marcia Goldman** - Marcia has led over a dozen trips to Israel with the Rabbi of her congregation.

1997

**Mark Greenstein** - Worked with the RPB as Chair. Chaired convention committees for San Diego and Washington, DC and held the position of VP of NATA.

1996

None Given

Service to NATA Award

This award is presented to an administrator who has contributed to the development of the Association, through leadership, committee or board service, publication or service to colleagues.

2000

1. **Warren Lieberman** - For his outstanding work on our Website, for service on the Board of Trustees, for his work on the San Antonio convention, as well as, his many years of work on our behalf.

2. **Jill Randell, FTA** - She served on our Board of Trustees, nurtured new members of NATA in her community, taught our classes and encouraged...
other NATA members by sharing her knowledge through those courses as well as through our Consulting Service. In addition, she co-chaired our conventions in Atlanta and Dallas.

1999

Keith Kraft - He has served as a board member and secretary of NATA, has represented us on the UAHC MUM Committee, presented at and presided over many convention workshops, served as Chair of NATA's By-Laws Committee and helped provide us all with a wonderful convention experience in Nashville.

1998

Eli Montague - He has served as Treasurer of NATA and has worked to create our NATA-Schmooze list serve system.

1997

Stephen E. Breuer - Served as President of NATA for four years. Has guided and nurtured countless NATA members and has encouraged many capable people to join our field.

1996

1. Norman Fogel - For his service and guidance as President of NATA.

2. Joseph Boston - For his work on the Board of Trustees and years of guidance for less seasoned NATA members.

Service to Community Award

This award is presented to an administrator who has contributed to the welfare of the greater community, through service (such as in government or commissions), local or national philanthropies, and work with youth, the elderly, etc.

2000

Judy Seiff - This NATA member spends many hours in the public schools educating students about Judaism. She has worked on many interfaith projects and with United Way where she is part of a committee to help distribute grants.

1999

Vicki MacKay - She takes her pets (both her dogs and now her birds as well) to hospitals, nursing homes, and institutions for children with disabilities. She also goes to synagogues and synagogue schools to explain Animal Assisted Therapy. In addition, she has been successful in obtaining birds for nursing homes and in educating their staff on the importance of animals in the lives of the elderly.

1998

Doris Markoff – Honored for her work with community seniors.

1997

Marjorie Sweetser Brill - Temple and temple neighborhood representative at meetings of the Oakland Coalition of Congregation; an interfaith organization in Oakland comprised of 25 churches and synagogues. She played an integral part in making the neighborhood safer and more desirable. Marjorie is also a Floor Volunteer at Oakland Children's Hospital working with children in intensive care.

1996

Jeffrey Herzog - Jeff is active in a large number of communal causes including teaching in the religious school of his congregation. In addition he has volunteered with the Pittsburgh Child Guidance foundation, the East End Cooperative ministry, the Pittsburgh Community Health Challenge, the American Red Cross, as well as many school districts.

Yasher Koach!
Janice Rosenblatt, FTA, receives Special Guardian of Loving Kindness Award from Fern Kamen, FTA at the 2000 NATA Convention.

Fern Kamen, FTA, greets Steve Breuer at the 2000 NATA Convention.

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