



# NATA Journal

A Semi-Annual Journal of Synagogue Administration

PUBLISHED BY NATIONAL ASSOCIATION OF TEMPLE ADMINISTRATORS • SUMMER 2006

## TABLE OF CONTENTS

FROM THE EDITOR	2
PRESIDENT'S MESSAGE	3
COMPASSIONATE DUES RELIEF	4
JEWISH ETHICS IN OUR WORKPLACE	5 - 6
<b>ADMINISTRATIVE RESPONSA</b>	
CAN YOU FIRE A VOLUNTEER?	7
HIRING CONGREGANTS AS PAID STAFF	8 - 9
SOCIALLY RESPONSIBLE INVESTING	10
PAYING A LIVING WAGE	11 - 12
PUTTING GOD IN YOUR BRIEFCASE	13
SUPPORTING YOUR SUPPORT STAFF	14 - 15
CONFLICTS OF INTEREST	16
PROFESSIONAL TEMPLE ADMINISTRATION AND NATA AT 65	17 - 19

# Derech Eretz

דרכ ארץ



**DOING WHAT IT TAKES TO MAKE OTHERS FEEL RESPECTED**

## NATA IS 65 YEARS OLD!!

Read the complete history by Steve Breuer on Pages 17 - 19

## FROM THE EDITOR

Alice Miller, FTA Executive Director,  
Temple Beth Sholom, Miami Beach, FL



I want to thank Loree Resnik, President of NATA, and Nancy Schneider, former editor of the NATA Journal and Administrative Secretary of NATA, for asking me to take on the editorship of the Journal. I thought this particular issue would be an easy task, since we had just completed an incredible few days of study with our mentors, Rabbi Sam Joseph of HUC-JIR, and Dale Glasser, Director of the Office of Synagogue Management of the URJ, who taught us so much that we were eager to impart to others. The theme of our convention was “*Derech Eretz: Fostering Jewish Values in the Workplace.*”

One month led to another, and before I knew it, it was too late for a winter or spring issue, so here is our summer, *almost fall*, issue. Steve Breuer informed me that this was the 65<sup>th</sup> anniversary of NATA, and blessed us with a brief history of the establishment of our organization, so we are dedicating this issue to that celebration and to *Derech Eretz*, which Rabbi Sam Joseph defined as “**doing what it takes to make others feel respected.**”

Our challenge during the convention was to write *responsa*, an area usually reserved for rabbis who deliberate decisions. Our *responsa* were in subjects that affect administration of synagogues, rather than those more suited to interpretation by rabbis.

We were broken into four separate groups with the following questions:

### Questions:

1. Is it possible to fire a volunteer? A chair of a congregational committee?
2. Should our congregation adopt a living wage policy?
3. Is it permissible to hire congregants as paid employees of the congregation? Should we do so?
4. Should our congregation adopt a policy requiring socially responsible investing or purchasing?

Ann Targownik, Carolyn Shane, Alan Halpern, and Ruth Cohen wrote *responsa* based on their group sessions, using the following *Responsa* template:

1. What can we learn and/or infer from Jewish tradition about this issue?
2. From a present day standpoint, what points of view can we, should we, take into consideration as we ponder this question.
3. Can we synthesize Jewish teachings with current day thoughts and opinions?

**Answers:** Based on our synthesis of Jewish values and practical considerations....

The *responsa* on pages 7-12 reflect the consensus of the groups, but not necessarily the hours of deliberation that went into these discussions.

Other articles from our colleagues Loree Resnik, FTA, Livia Thompson, Esther Herst, FTA, Gary Cohn, FTA and Susie Amster, FTA, remind us of Jewish Ethics in our Temple Workplaces and how our treatment of congregants, staff, board, and our own lives remain reflective of *derech eretz*.

I thank all of my colleagues who pitched in to put this issue together, without whom it might have been a winter 2007 issue!!

B'shalom,

*Alice Miller*



VOL XLII No. I  
Summer 2006/5766

National Association of  
Temple Administrators  
[www.NATAnet.org](http://www.NATAnet.org)

## Editorial Board

Alice Miller  
Editor

Amy Mallor

Loree Resnik

Ann Targownik



Affiliate of  
The Union of Reform Judaism

Serving Reform Congregations in  
North America

# PRESIDENT'S MESSAGE

Loree B. Resnik, FTA. Executive Director, Suburban Temple - Kol Ami, Cleveland, OH



In a wonderful book entitled "Fifty Ways to Be Jewish," Rabbi David Forman, former Director of Educational Programs in Israel for the URJ, tells us that "a certain alienation has taken hold of the American reality, and too many people get lost. A community is very much needed, and a synagogue can serve this need." For those of us who have made Temple administration our careers, this is a

rather awesome responsibility, yet one we have eagerly accepted. To that end, we come together each year in conference for learning, for renewal, for relaxation and for friendships. To share our concerns, our strategies, our goals and our experience with trusted colleagues leaves us feeling ready to take on the next challenges.

Last fall, we studied together and explored the area of "Derech Eretz in the Workplace." We took the time for prayer and worship, for engaging first-timers in the work of NATA and for pre-

senting and attending workshops dealing with *tachlis* in so many areas of the work we all do. We have the opportunity to share with the leaders of our Reform movement, our Rabbis, our congregational presidents and others the essence of that work in this NATA Journal. We proudly present this Summer 2006 issue to you and I personally thank its new editor, Alice Miller, FTA.

Each of our colleagues who wrote articles for this journal took their own personal time to contribute and we are grateful. It is our hope that each of you will find wisdom in what they say, bring it back to your own congregations and share it with them. If, indeed, we can make that happen, we will have fostered *Derech Eretz* in the workplace. We will have promoted decency and consideration. We will have lived and taught the message from *Pirkei Avot*, "Where there is no *Torah*, there is no *Derech Eretz*, and where there is no *Derech Eretz*, there is no *Torah*."

L'Shalom,

*Loree B. Resnik*

## NATA Members with FTA Designations

Frank Adler	Thomas Jablonski
Ann Albert	Robert Jacobs
Susie Amster	Joseph Kahn
Elaine Arffa	Fern Kamen
Philip Aronson	Edward Kaplan
Leo Bamberger	Jeanne Kort
Serane Blatt	Keith Kraft
Joseph Boston	Terry Kraus
Steven Bram	Gail Kroop
Stephen Breuer	Barry Kugel
Janet Bronitsky	Alice Miller
Gary Cohn	Eli Montague
Sonya Dinnsen	Harold Press
Julian Feldman	Jill Randell
William Ferstenfeld	Loree Resnik
Norman Fogel	Dennis Rice
Henry Fruhauf	Janice Rosenblatt
Sandra Galfond	Alan Samuel
Samuel Goldstein	Gary Simms
Mandell Greene	Marc Swatez
Louis Heller	Terry Taubman
Esther Herst	Marvin Walts
Jeffrey Herzog	Mark Weisstuch
Elizabeth Hirsch	Nanci Wilharber

## 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 learn from and share with one another.

This e-mail discussion group is limited to regular, senior, and courtesy members of NATA and NAASE who are currently serving as executive directors or administrators in temples or synagogues on a full- or part-time basis.

Subscriber information can be found at:

<http://WWW.NATANET.ORG>

For more information about **NATA-SCHMOOZE**, contact: Leon Silverberg, FTA, at [LSilverberg@tbegreatneck.org](mailto:LSilverberg@tbegreatneck.org)

## Compassionate Dues Relief

Loree B. Resnik, FTA, Executive Director, Suburban Temple - Kol Ami,  
Cleveland, OH



As we began the work on the publication of this latest edition of the NATA Journal, we determined that the theme would carry over from last fall's NATA Convention in Houston, which focused on the concept of "Derech Eretz in the Workplace." Clearly, this is a topic that reaches out into all areas of the work of our colleagues in so many of the subjects

that fall within our purview: Human Resources, Staff/Board Relationships, working with volunteers, dealing with vendors—clearly all that we do.

In Houston, Rabbi Sam Joseph of Hebrew Union College in Cincinnati worked with us throughout the convention, bringing his wide range of expertise to this educational theme, ably assisted by Dale Glasser, the Director of the URJ Lottie and Irwin Daniels Department of Synagogue Management. Together, we explored many of the ways we relate to this important concept that is so much a part of living Torah.

As we learn to continually "take the high road" in our relationships with the other members of our senior staffs, with those who function in the support service roles in congregational life and with our lay leaders, surely it is equally or more important that we set these same standards in the ways in which we relate to those members of our congregation who are struggling financially and are looking for a way to come into the tent or to continue their membership in difficult economic times.

Those who know me or have heard me speak know that I like to tell stories. I look at us as the carriers of the stories of our people, the contributors of a continuing oral and written tradition that didn't end in ancient times. How better to look at the difficulty of our roles as we serve as partners in the almost Solomon-like judgment that determines who can come in and who can stay in the congregational family?

And so, just this past week, two such stories came to me in the tales of my families who came into my office. The first was a woman, an incredibly special person who serves my congregation in myriad volunteer ways. It was something personal, she said. That has become a known code to me; it is often the beginning of a discussion of a topic that appears at length in the Synagogue Management publication, *Money Matters: Compassionate Guidelines for Talking Dues*. She came alone, she said, because her husband was not able to talk about this. "He is such a proud man," she said. But they are living on social security income and a very moderate pension. Sometimes they need to help their grandchildren, and those teens will soon be entering college. She talked, in an embarrassed way, of a short annual vacation that perhaps they ought to give up in order to pay full dues. Knowing that our small group composed of our Rabbi, our President, our Treasurer and me, would approve the

reduction to the level she asked for, I assured her how much we valued them, what blessings they are to our Temple, our appreciation for the events they had chaired and their other activities. Mostly, for the zillionth time in my twenty-eight years in this field, I felt sorry. Sorry that we had not yet reached a time when we could go to a totally voluntary contribution system and had to continue to discuss something most of us still call "dues."

Yet I did feel some sense of pride, knowing that my congregation does do the right thing in adjusting these commitments whenever we are appropriately asked and that we do it in a way that strives to leave in tact the dignity of our congregants. Isn't that, after all, what living Torah means? What else should guide this holy work?

Two new members joined my congregation this past week. They had been unaffiliated for more than thirty years and wanted to enter the doors of synagogue life once again, because they had been so uplifted when attending with their children and grandchildren. Could they, they asked, bring her mother occasionally? Her mother is 97 years old. About five years ago, this woman who is living entirely independently, on minimal social security, but maintaining a condominium with some rather large assessments, asked for a dues reduction from another congregation. She was told this was not possible. The new congregant asked, "Can my mother come with us occasionally to something that might only last about an hour, the longest time she could really be anywhere?" Of course she could come, but more importantly, she can be a member in her own right, at zero or whatever dues they believe she can afford at this time. Her daughter actually had tears in her eyes when I told her. She would not fill the form out for her; she wanted to take it to her mother, who was more than capable of completing it herself. With enormous pride and gratitude, they came together to bring back the completed application. I could only feel that this truly was *derech erez* in the workplace.

This, to me, is what makes our work holy. This is the way we model what it means to live Jewishly. Who of us knows whether or not we will walk in these footsteps? Who of us wants to close the gates of prayer to all who want to enter? Who of us doesn't want to be considered a sympathetic partner, a gatekeeper who tries to keep those doors open? *Pirkei Avot 2:2* tells us, "Let all who work with the congregation do so for the sake of heaven, the merit of their ancestors will sustain them and, as a result, their righteousness will remain forever." If we are effectively doing our jobs, helping those who can do so much more financially understand their responsibility, maintaining the partnership with rabbinic and lay leaders, and acting as advocates for the most needy among us, we will be remembered as among the righteous. May it ever be so.

# Jewish Ethics in our Temple Workplaces

## Can the "Prophetic Voice" guide our internal practices?

Esther Herst, FTA, Executive Director, Temple B'nai Torah, Bellevue, WA



(This article is adapted from presentations at the URJ 2005 Biennial and the Spring 2006 meeting of the Commission on Social Action of Reform Judaism.)

*"And always, always we must remember that our ultimate goal is not just to collect clothing or canned goods, but to inculcate lifelong kindness. And so the most important teaching we can do in the synagogue is to model fair, decent, respectful behavior towards our staff, our co-workers and our fellow congregants."* Rabbi Janet Marder, Kehilat Tzedek – Creating a Community of Justice

Reform Judaism is famed for its commitment to social justice. As a "prophetic voice" within the Jewish and larger communities, the movement has a glorious history of leadership on behalf of civil rights, peace, economic justice and an end to poverty and hunger. The movement lobbies in Washington, DC, and even internationally, to protect human rights and liberties across the globe.

All too often, however, this sensitivity to economic and personal needs stops at the doorways of our synagogues. We are busy fighting for the well-being of others around the world, yet we ignore the same issues within our own congregations. How do we turn our "outside" ethics into "inside" practices?

*"Once the head is removed, what good is the body? Once the body is taken away, what good is the head?"- P'sikta D'Rav Kahana, Solomon Buber, ed.*

Often, our congregational leadership focuses primary attention on our "head" - the clergy - and the "body" - administrative staff, program experts, custodians, part-time employees - gets lost. As Executive Directors we can remedy that. We have a responsibility to create a consciousness among our leadership of the critical value of the non-clergy staff. By modeling respectful behavior towards our staffs, we can educate our congregants to see the non-clergy staff as a vital component of our *Kehillah Kedoshah*.

Jewish tradition calls on us to treat our employees equitably and fairly. I suggest that this translates into three categories.

- ◆ Wages and Benefits
- ◆ Physical Work Environment
- ◆ Respect and Consideration

### WAGES & BENEFITS

This is both the most obvious, tangible response to the concern about fair and equitable treatment and the most challenging, since it costs money. Addressing wage inequities forces our leadership and congregations to see the temple's finances as an extension of our values.

Here is a checklist of the options usually available to our clergy, educators, and ourselves. How well and often do the same options apply to our non-contractual staff?

- ◆ Using salary surveys and market data to help us determine both pay and benefit ranges.
- ◆ Earning a living wage, which means enough to support a family if our employee is the sole wage-earner.
- ◆ Health coverage
- ◆ Pensions or 403(b) plans with synagogue matches
- ◆ Flexible spending plans to use pre-tax dollars for uninsured medical costs or dependent care
- ◆ Seniority increases in vacation time
- ◆ Long and short term disability
- ◆ When we face a financial shortfall, are the cuts spread across the board evenly or do the contractual workers continue to get their raises and benefits while non-contractual employees get little or nothing?
- ◆ If a lay-off occurs, is there an option of severance or unemployment compensation?

Incorporating all of these options into everyone's pay packages at once is probably impossible for most synagogues, given the precarious financing many of us face. As Directors, we can create an ongoing plan to offer our non-contractual staff the financial rewards they deserve over a multi-year time frame. Meanwhile, we are teaching *Derech Eretz* - to do right and justice - to our financial volunteers, our Treasurers, and our Boards.

### PHYSICAL WORK ENVIRONMENT

Clergy, Educators, and Executive Directors usually have our own offices. We often get to furnish and personalize them to meet the requirements of our jobs. This is right and appropriate. In contrast, administrative assistants, bookkeepers, and other program staff often share space, contending with the noise of their colleagues on the

phones or speaking with visitors, having very little personal area and virtually no privacy.

For reasons of dollars, architecture, and just the reality of synagogue administrative work, often this basic setup cannot be changed. But we as Executive Directors can focus on some ways to ameliorate the challenges.

- ◆ Are the spaces ergonomically appropriate? Do our people have good chairs, desks that are the right height, effective lighting, and physical layouts that don't mimic a Dilbert cartoon?
- ◆ Are the computers, copiers, and other office equipment functional and capable of performing as needed to effectively do the job?
- ◆ Are the work spaces accessible for people with physical challenges, i.e. elevators, wide doors, walking areas within offices?
- ◆ During the workday, are there times that we can mandate "quiet", when the phones are on automatic answer and the professional staff doesn't interrupt the administrative personnel, so that the latter can concentrate on their own projects without distraction?

Maintaining a sense of camaraderie and warmth within the Temple's front office is important to our members and guests, as well as to our staffs. Yet, the opportunity for quiet and focus are vital both for personal well-being and effective work habits.

### RESPECT AND CONSIDERATION

The men and women who work in our synagogues rarely do so for the money, the great benefits, or the modern and well-organized work spaces. They are here because they recognize and value the spiritual home that our congregations can be. What do we do for them to acknowledge their commitment?

How often have we heard, "Oh - she's just the secretary" or "He's the janitor, he won't care" as excuses for bad behavior by our congregants or even by other staff? *Derech Eretz* demands that we value and celebrate the dignity and worth of each of our employees. As Executive Directors, we have a special responsibility to represent their interests before our Budget Committees, our Boards, our Clergy, and our congregants. We can model the behavior we expect for ourselves by exhibiting it towards the rest of our staff.

- ◆ Ensure that the congregation has effective, comprehensive, and appropriate Personnel Guidelines.
- ◆ Institute a thoughtful and sensitive employee appraisal and goal-setting process and seek employee input about what it should look like.

- ◆ Remember birthdays, special occasions, and holidays.
- ◆ Offer opportunities to celebrate together, such as a winter Staff Luncheon at a nice restaurant, but recognize that socializing all together may not be the way everyone wants to be thanked. Think in terms of gift certificates for spa-days, stores or restaurants as thank you gifts.
- ◆ Publicly recognize the staff at every opportunity. Thank them in the bulletin, at High Holy Days, at the congregation's Annual Meeting.
- ◆ Privately remember that a synagogue staff often functions as a family - with all the personal joys and sadness that families can hold. Be there when a staff member has a family death or serious illness. Be generous with days off for mourning or family crises. The loyalty and mutual regard that come with such empathy and personal support can lead to more effective work habits and a collegiality often missing in the employer-employee relationship.

The core question is, "As we strive to make our synagogues 'warm and welcoming' places to be Jewish, have we ensured that they are 'warm and welcoming' places to work?"

A *Kehillah Kedoshah* is a shared endeavor and if we only give honor and recognition to the chiefs among us, we stand to lose not only the respect of the rest of our laborers, but also the skills and excellence that they would otherwise contribute. Equitable and fair treatment, acknowledgement of the special contributions each individual makes, and creating an environment that is healthy and supportive are all means towards congregational sustainability. Without that, we stand to lose the "body" - and as temple administrators we know better than anyone what a devastating loss that can be!

(Final Note: The URJ Commission on Social Action has voted to partner with the Department on Synagogue Management to develop an "ethical audit checklist" to better educate congregations about the importance of *derech eretz* in the treatment of synagogue employees.)

The four articles following on pages 7 - 12 are summaries of group sessions from the 2005 NATA Convention and are not necessarily the opinion of the authors.

# THE QUESTION: Is it possible to “fire” a volunteer?

## A chair of a congregational committee? What are the ethical considerations at play?

Ann Targownik, Executive Director, Stephen Wise Free Synagogue, New York, NY



### What can we learn and/or infer from Jewish tradition about this issue?

“...Let all who work with the congregation do so for the sake of Heaven...” [Pirke Avot 2:2]

The mission of the synagogue is to draw people to Judaism and a life guided by its principles. Congregants are influenced by their experiences in worship, study, cultural and social justice activities, as well as

by their experiences as they endeavor to direct and sustain these activities.

“...Let your friend’s honor be as precious to you as your own...” [Pirke Avot 2:10]

Lay leaders may be elected or appointed; volunteers may serve occasionally or on an ongoing basis. Their insights, expertise, commitment, and support affect the nature and the success of the synagogue and the vibrancy of Judaism itself.

“...Don’t judge your fellow human being until you have reached that person’s place...” [Pirke Avot 2:4]

The staff’s expectations and working relationships with each leader and volunteer will differ depending on their roles. Encouragement and mutual respect must guide all interactions.

“...Reprove your neighbor but incur no guilt because of him.” [Lev. 19:17]

Staff and congregants also share the sacred responsibility to safeguard the goals and standards of the community. This mandate presents a complex challenge when a congregant’s performance is inadequate or contrary to the very principles that guide the mission of the synagogue.

“One must be careful not to demean a person in private, nor embarrass them in public, nor permit or perpetuate gossip.” [Maimonides’ Law of Character 6:8]

With sensitivity, avoiding words that may cause embarrassment and hurt feelings or provoke resentment, it is important to share concerns and help each person participate most fully, appropriately, and constructively. Respect for the individual is a core value, but the needs of the community are primary.

### From a present day standpoint, what points of view can we, should we, take into consideration as we ponder this question?

Congregants retain the ultimate right and responsibility to define leadership roles, to select their leaders, and to serve. Though the staff may collaborate with and influence lay leaders, they have no authority to appoint, elect, or remove lay leaders from their positions.

Commonly understaffed, congregations rely on volunteers who offer their time and expertise to complement and/or supplement lay leadership and professional efforts.

Today’s lifestyle leaves limited time for volunteer work; those who do step forward expect personally rewarding experiences and, most often, they expect their efforts to be acknowledged and appreciated.

A sense of ownership will encourage dedication and continuity; however, a sense of entitlement, and exclusionary attitude, or expectation of corporate-style perks would not be appropriate.

Individual volunteers may resist suggestions, decline training, react poorly to criticism. They may openly express their disagreement, disappointment or anger to others; they may provoke ill will, withhold financial support, and/or even leave the congregation.

Secular legal, medical, personal, and social justice issues must be considered.

### Can we synthesize Jewish teachings with current day thoughts and opinions?

The continuing vibrancy of Judaism requires a synagogue setting where lay leaders and volunteers can be comfortable, engaged, and excited, finding personal reward through their dedication, in collaborative effort. Lay leaders and staff must constantly and consistently juggle the goals of the community and the needs of the individual.

While Judaism challenges us to reach for and work within the highest ideals, Judaism also provides the wisest, most practical guidance to deal with this dichotomy. The relevance and value of Jewish sacred text, commentary and study comes to life through our application.

### ANSWER: Based on our synthesis of Jewish values and practical considerations, we see that every effort must be

made to create successful volunteer experiences, for the sake of the individual as well as the community.

If a volunteer fails to perform adequately or adversely affects other individuals or the community itself, we must evaluate our own responsibilities as professionals. Have we partnered with lay leaders to establish goals, share priorities and parameters? Have we provided the necessary direction, information, training, and support, fostering constructive dialogue? When necessary, have we offered alternatives and counseling? Have we properly redirected volunteers to more appropriate tasks and established revised boundaries? Will the lay leadership, or are we authorized to, impose restrictions or ultimately introduce prohibitions? Have we taken care to avoid negativity, gossip, ill will?

In all cases, when all possible constructive options have been explored and exhausted, the volunteer must be addressed directly, with great sensitivity, respect, and constructive direction. Each person must be thanked for his or her service in a manner that protects honor and expresses sincere appreciation for genuine effort.

## The Question: Is it permissible to hire congregants as paid employees of the congregation? Should we do so? What are the ethical considerations at play?

Alan Halpern, Executive Director/Cantor, Temple Israel, Dayton, OH



Alan Halpern facilitated and summarized a discussion among more than 25 executive directors at the 2005 NATA convention on the topic of employing members. This is his summary of that extended discussion.

### What can we learn and/or infer from Jewish tradition about this issue?

Modern employment law and practice often require or encourage us to treat others as adversaries, yet Hillel taught, "In a place where there are no humans, act like a human being" (*Pirkei Avot*, 2:6). Maintaining Jewish values-avoiding embarrassment, keeping secrets, paying a fair wage-becomes more difficult when a congregation's members are also its employees. These cases challenge a synagogue's leaders to balance Jewish and contemporary contexts.

When members become employees (or vendors), they establish a second relationship with the congregation and its constituents. One friend reviews another's dues or job performance. Networks that share confidential information on behalf of the congregation overlap with social networks in which the same information would be gossip.

Jewish tradition teaches us that we must be careful not to embarrass either intentionally or unintentionally (*Baba Kama* 27a) and that we must be careful not to reveal secrets: "One should not even verbalize a secret to himself-as people say, 'the walls have ears.'" The need for confidentiality applies variously to these multiple relationships.

### From a present day standpoint, what points of view can we, should we, take into consideration as we ponder this question?

A congregation's staff seeks, receives and uses information about members' finances and personal lives. While some information might be naturally shared among members, staff often has access to more or different information and certainly receive that information for different reasons. Equally important, congregants, particularly officers and directors, learn information about staff that they would never know about typical members including salary, job performance and insurance.

Because members and member-employees see each other socially as well as professionally, they will face greater temptation to share this information. The distinction between

sharing information about the congregation's budget and gossiping about someone's salary, for example, may sometimes be hard to see. Even if the information is never shared, the knowledge may affect friendships. We are told not to put a stumbling block before the blind. Possession of confidential information about friends may well be a kind of stumbling block.

Potential embarrassment or secret-revealing pertains not only to those employed but also to applicants for employment and those who review (and reject) member-applicants. Applicants and hirers may feel embarrassed or awkward about their experiences and decisions made in the process of inquiring about, applying and being interviewed for a position. Can we synthesize Jewish teachings with current day thoughts and opinions?

Embarrassment may involve those who witness these relationships, either other members or outsiders, and we Jews are also counseled to distance ourselves from the appearance of impropriety (*Chulin* 44b). Others may perceive that member-employees, vendor-employees or their family members receive preferential treatment within the congregation. These overlapping relationships can be created not only when a member is hired, but also when an employee is granted membership as a perquisite, joins upon his or her own initiative or marries a member.

A further concern is that member-employees who lose their positions in the congregation may also feel cut off from their Jewish community. This loss could also be felt by family members. Many of us maintain separate professional and social communities. Someone who loses a job may lose touch with some friends at work, but maintain friendships formed outside work. A person who moves because of a promotion will see friends from the old city less often but continue professional relationships within the company. Member-employees may lose more than their livelihood when their employment ends; they may lose their Jewish community. Even successful employees who leave on good terms may find it hard to shift from being employees to being members of the congregation.

Nearly all member-employees find it difficult to shift smoothly from member to employee or from employee to member. A member who becomes an employee surrenders certain privileges: the right or opportunity to hold a lay leadership position, to speak on controversial topics in the congregation, to vote. Optional events become required. Events that were previously social occasions are transformed into

work. These changes, too, may be felt by family members. Spouses or partners may be unable or unwilling to hold leadership positions, to speak out, to be shy. Although rabbis' partners and spouses are under greater scrutiny, their experience is probably not unusual for many visible partners and spouses.

A congregation can also feel its hands are tied when a member-employee performs poorly. Leaders may be slow or unwilling to address performance issues when a membership or friendship may be lost.

In spite of the many potential problems, congregations may feel compelled to consider members for employment. Certain positions require Jewish background, and congregations in smaller communities or in communities without a second congregation may not have qualified, non-member applicants. We encourage those congregations to hire members with great sensitivity and preparation. It may make more sense to compromise on qualifications than risk isolating a Jew or Jewish family where the congregation is the only Jewish community.

We also acknowledge a difference between part-time and full-time employment. Employees who work minimally for the congregation—religious school teachers or adult class instructors, temporary or seasonal office or maintenance staff—are less likely to learn confidential information and their employment may be less central to their financial and psychological well being. It may also be easier to discontinue their employment amicably.

Many of the executive directors who contributed to this discussion were hired from their congregation's membership, and they and their families remain "members" of the congregations they serve. It is because of this experience and because of the examples they have seen of failed employment relationships that they feel so strongly about the challenges and risks.

#### **Answer: Based on our synthesis**

For all the reasons above, we believe it is best that a congregation not hire its members for any full-time position because the risks are great relative to the potential reward and because the change to existing relationships is unavoidable and often irreversible. We recognize, however, that congregations may be compelled to make these choices and encourage congregations to make these choices with care, preparation and empathy. Set, communicate and follow policies and procedures that encourage communication and fairness. If possible, address the risks in advance and provide a graceful and non-embarrassing exit option for both the congregation and the employee. Any employment should benefit both the employer and employee and the end of employment should, ideally, neither harm nor embarrass either party.

## **The NATA Web Site: Log On!**

Have you visited the new, improved NATA web site? If not, log on at [www.natanet.org](http://www.natanet.org)

Major sections include the *Journal*; convention information; FTA certification, papers, criteria, and information; officers; and the mission statement. You can also find information on the NATA Placement and Consulting Services. Two other sections include Judaic and other internet resource links, including links to other web sites that contain information of interest and help to NATA members.

New information is always being added, and suggestions are always welcome, as is assistance in our goal to make the web site more interactive.

## **What is NATA?**

### **NATA IS THE NATIONAL ASSOCIATION OF TEMPLE ADMINISTRATORS.**

As an affiliate of the URJ (Union for Reform Judaism), NATA is the professional organization for those who serve synagogues as executives, administrators or managers.

NATA, founded in 1941, has grown from a mutual support fellowship to an international resource offering a variety of services, programs and support to colleagues and congregations.

NATA is dedicated to improving the management of Judaism's key institution: the synagogue.

**NATA National Office / Placement Services · P.O. Box 936 · Ridgefield WA 98642**  
**1-800-966-NATA ♦ FAX: 360-887-1118 ♦ NATAOffice@natanet.org ♦ Website: www.natanet.org**

## The Question: Should our congregation adopt a policy requiring socially responsible investing? What are the ethical considerations at play?

Ruth Cohen, Executive Director, Temple Sinai, Denver, CO



### What can we learn and/or infer from Jewish tradition about this issue?

*Jewish tradition is steeped in recommendations and teachings in ethical accumulation of wealth. For example, according to the Book of Proverbs, "(The) whole network of halakhic rulings exists in order to ensure that the way a man*

*accumulates wealth is neither morally damaging nor physically harmful to his fellow men...these restrictions, if observed, must necessarily limit the scope of a Jew's economic activities..."*

### From a present day standpoint, what point of view can we, should we, take into consideration as we ponder this question?

*Should our priority be protecting our assets or maximizing our returns, or both? At the expense of socially responsible investing? It is our responsibility to ask these questions.*

### Can we synthesize Jewish teachings with current day thoughts and opinions? If so, what does that say to us?

*Our Jewish tradition informs, and Reform Jewish commitment to social justice requires us to wrestle with socially responsible investors.*

### ANSWER: Based on our synthesis

*We have an obligation to inform ourselves about organizations we invest in (due diligence). Our highest obligation is to protect the synagogues assets. The desire to get maximum return must be tempered with an eye to the temple's values and the values on the entities in which they invest.*

*The support the Union for Reform Judaism's CHAI resolution and investing in Israel are examples of socially responsible investments.*

*We need to recognize the limitations of passive investments (mutual funds). We should take those proactive steps given to us (voting proxies, resolutions, etc).*

## NATIONAL ASSOCIATION OF TEMPLE ADMINISTRATORS

### PRESIDENT

Loree Resnik, FTA

### Vice Presidents

Susie Amster, FTA  
Janice Rosenblatt, FTA  
Livia Thompson

### Treasurer

Edward Alpert

### Administrative Secretary

Nancy Schneider

### Immediate Past President:

Gary S. Cohn, FTA

### BOARD OF DIRECTORS

Debbie Coutant	Jeanne Kort, FTA
Joyce Engel	Hilary Leboff
Suzanne Geshekter	Carolyn Shane
Betti Greenstein	Gary Simms, FTA
Esther Herst, FTA	Leslie Sporn
Jeffrey Herzog, FTA	Marc Swatez, FTA
Robert Isaacs	Sandy Voit

### HONORARY BOARD MEMBERS

William Ferstenfeld, FTA  
Elizabeth L. Hirsch, FTA  
Fern M. Kamen, FTA

### EX-OFFICIO MEMBERS:

Eric Yoffie, President, URJ  
Robert Heller, Chairman of the Board, URJ  
Michael Kimmel, CAO, URJ  
Dale Glasser, Director, Department of Synagogue Management, URJ

### PAST PRESIDENTS

Irving I. Katz, FTA*	Melvin S. Harris, FTA
Max Feder, FTA*	Walter C. Baron, FTA*
Bernard I. Pincus, FTA*	Henry Ziegler, FTA*
Louis J. Freehof *	Shirley M. Chernela, FTA*
Nathan Emanuel, FTA*	Harold Press, FTA
Henry S. Jacobs*	Ilene Herst, FTA*
Frank J. Adler, FTA	William Ferstenfeld, FTA
Henry Fruhauf, FTA	Norman Fogel, FTA
Julian Feldman, FTA	Stephen E. Breuer, FTA
Bernard Lepoff, FTA	Fern M. Kamen, FTA
David I. Mitchell, FTA*	Elizabeth L. Hirsch, FTA
Frank L. Simons, FTA*	Gary S. Cohn, FTA

\* of blessed memory



## The Question: Should our congregation adopt a living wage policy?

Carolyn Shane, Executive Director, Temple Emanu-El Westfield, NJ



### What can we learn and/or infer from Jewish tradition about this issue?

As Jews, it is our obligation to pay fair wages. It is a greater *mitzvah* to provide people with an opportunity to earn their own way in life, rather than give them charity.

It is our responsibility as Jews to be crusaders for social justice. We are in partnership with God to work towards *tikkun olam*. Our Torah teaches:

- ♦ Forgive debt
- ♦ Do not abuse a needy and destitute laborer
- ♦ Treat all people fairly
- ♦ Give people the opportunity to better themselves
- ♦ Pay laborers a fair wage

While it may superficially appear that the interests of the community are served by paying lower wages to our employees, ultimately it is in the best interest of the synagogue community to adhere to the values of Judaism; our community will be judged by how we treat all within our community.

### From a present day standpoint, what points of view can we, should we, take into consideration as we ponder this question?

We often see a distinct difference in wage level paid to senior staff and that paid to custodial or secretarial staff. To establish and maintain a fair system, we should:

- ♦ Review the difference between minimum and true living wages, and the impact of each.
- ♦ Define a relevant, appropriate living wage policy. This will differ from community to community. Consider that a living wage differs for individuals and those who support a family. Establish a consistent wage policy for the synagogue for each position. Review and compare wages in other communities. Establish across-the-board, fair, consistent standards. Consider local market standards and the relevance of the “union” approach.
- ♦ Consider the Jewish tradition to make everyone whole.
- ♦ Considering the ability of the congregation to pay a living wage, and the importance of clear job descriptions; define quality of work expectations, track employee turnover, and note the importance for workers to take

pride in their work.

♦ Review the temple budget – expenditure patterns and income sources. Too commonly, our response to deficits disproportionately affect support staff wages, most particularly that of the custodians.

♦ Develop a 5-year plan to enable the congregation to meet appropriate wage earnings and employee benefits levels; the total compensation package should be considered.

Congregations facing difficult financial circumstances must base their decisions on fair and ethical guidelines. For example, if it becomes necessary to freeze wages, whose wages should be frozen?

### Can we synthesize Jewish teachings with current day thoughts and opinions? If so, what does that say to us?

- ♦ Synagogues are “more” than just a business.
- ♦ We are not-for-profit.
- ♦ We should set the standard
- ♦ We are expected to adhere to higher standards concerning the dignity and respect given to our employees.
- ♦ We should pay a living wage in order to enable every employee to sustain a viable standard of living.

The Religious Action Center, led by Rabbi David Saperstein, offered the following regarding living wage, January 11, 2000:

“And in such an economy, to pay workers less than a living wage is certainly to withhold their rightful share of prosperity, and to deprive them of justice and fairness. For a living wage is more than a specific salary and benefits. It is the ability to own a home and build equity. To provide for one’s children *and* spend time raising them. To fuel the economy by having money to spend. To ensure the future by having money to save. A living wage is nothing less than the ability to participate fully in the life of this nation.... And we ask federal, state and local governments to lead the way towards economic justice by passing living wage ordinances.”

It is the obligation of every synagogue to develop a plan to achieve the ability to pay its workers in accordance with these principles and goals.

The process must include a dialogue for change.

1. Administrators should discuss this responsum with their rabbis.
2. The rabbi and administrator should bring this responsum to the lay leadership – exploring the issue with the treasurer and other officers, and the personnel committee.
3. The obligation ultimately lies with the congregation to fulfill an obligation to its employees.

#### Answer: Based on our Synthesis

We feel it is the obligation of each synagogue to live up

to the standards set forth in the teachings of Judaism, to act upon and pursue social justice in all aspects of temple life, and to treat each and every employee with respect and dignity.

Judaism calls upon us to serve as a light unto the nations. The synagogue should set the standards, ethical and moral, as an example to respectable businesses and communities. We must acknowledge that every laborer has a basic human right to earn a living wage and the opportunity to improve upon his or her life. It is the responsibility of our lay leaders to develop the guidelines and the means to meet this obligation.

## "Putting God In Your Briefcase"

Susie Amster, FTA, Executive Director  
Temple Beth Shalom, Santa Ana, CA

Excerpts from Rabbi Jeffrey K. Salkin, author of *Being God's Partner: How to Find the Hidden Link Between Spirituality and Your*



*Work* with permission from the author and publisher

There is an old Hasidic tale where a man laments to his Rabbi that he's frustrated because his work leaves him no time for study or prayer. The Rabbi replies to him by saying, "Perhaps your work is more pleasing to God than either study or prayer." So, how can we make sure that our work is done in a way that is personally uplifting and helps further God's mission?

We must become God's partners in our work, making work a vehicle for spiritual growth and personal understanding. Work may be the most potent vehicle for fulfilling spiritual life because, for many of us, it presents the best opportunities to meld community and social and economic productivity with personal belief and individual talent.

Letting spirituality and faith speak to us in our work will accomplish many things. For one, it will teach us to move beyond ambition and success and will enable us to think about how we conduct our business. It will remind us of Judaism's precious gift to the world - the idea of *mitzvot* - of holy obligation. It will increase our enthusiasm for our work, especially when work becomes wearisome,

and help us avoid burnout and stress.

The boss of the moving crew was a delightful, crusty, but gentle man. There was never anyone so enthusiastic about his work. What was the source of that enthusiasm? "Well, you see, I'm a religious man," he answered, "and my work is part of my religious mission. Moving is hard for most people. It's a very vulnerable time for them. People are nervous about going to a new community, and about having strangers pack their most precious possessions. So, I think God wants me to treat my customers with love and to make them feel that I care about their things and their life. God wants me to help make their changes go smoothly. If I can be happy about it, maybe they can be, too."

Make God part of your professional code and your job description, as part of your moral resume, as part of how you do whatever you do. By doing this, by imitating God, we can transform our work - or at the very least, how we think about our work - into something higher and deeper and more satisfying, both to ourselves and to others. Our careers consume much of our strength and our time and our creativity, but our careers must never consume us. One way to wake up to ourselves, to be truly alive, is to ask ourselves, "For whom do we work?" When the answer is clear, we will still work - for that is our purpose in life - but we will do so with a pure heart and with a more playful and more prayerful soul.

## Supporting your support staff

Livia D. Thompson, Executive Director,  
Central Synagogue, New York City



Synagogues, like any other organization, rely on the hard work and talents of many different kinds of employees. Some of these employees are highly educated, the public face of the staff, and the leaders of the staff. This group, the “senior” staff, is the most highly compensated employees of the synagogue - clergy, educators, and top administrative staff usually fall into this category.

Many of the staff, however, are skilled in their specific area, often not as well educated, and fall within the larger “support” team of the staff, and generally, the least well compensated employees of the synagogue. And yet, what we ask of this support staff—our maintenance workers, our administrative assistants, our receptionist, our bookkeeper - is enormous, and the work of the synagogue relies on their efforts. The support staff is often the first synagogue employee that members and prospective members interact with, and the individual who helps make the difference between the congregation feeling like a warm and open place, or a cold and impersonal place. Moreover, their work allows the lay leadership and the senior staff to do their jobs and to focus their energies on the ritual, educational and community programming that defines the congregation. Without the lights on, the sound system working, and the sidewalks swept clean of snow and ice, no one could participate in the wonderful programs and activities that are being offered.

As a matter of self-preservation (if not a question of *derech erez*), therefore, it would seem to be obvious that it is important to make sure that the support staff feels appreciated and respected for what they do, including being given a living wage and decent benefits. There are many ways to do this within the confines of the financial realities that congregations face. Some of the ways, with and without financial implications, to support the support staff are listed below:

- ♦ a comfortable work environment
- ♦ clear and evenly managed personnel policies and practices;
- ♦ ongoing feedback and job reviews
- ♦ yearly salary increases at or above inflation rate
- ♦ medical coverage, and access to other benefits
- ♦ reasonable work hours and realistic expectations
- ♦ fairness to all staff, and equity in treatment of staff in similarly situated positions

- ♦ employer provided pension plans for staff and other ways for staff to save for retirement
- ♦ ongoing educational opportunities and stipends to support ongoing education
- ♦ verbal and written thank yous from the top lay leadership and staff
- ♦ special events, lunches, outings for the staff
- ♦ opportunities for the staff’s concerns to be voiced and expressed to senior management in a productive way
- ♦ ongoing interactions with the senior staff - educational and social programs at the Synagogue meetings on issues concerning the congregation, updates on what is happening at the Synagogue;
- ♦ possibilities for advancement within the synagogue, and for growth within each job
- ♦ a sense of team work at all levels of the staff, and among all levels of staff
- ♦ a sense of team work with the lay leadership
- ♦ extra treats such as closing on July 3<sup>rd</sup> when it is a Monday, or closing early before a holiday weekend, or ordering pizza for the staff on a rainy day;

While each synagogue’s financial situation and management culture may make some of the above more or less practical, and this is not intended to be a comprehensive list, the basic premise is important for all congregations. Treating your support staff well is good policy, good human relations, and good for the congregation.

## SAVE THE DATES!

### NEXT NATA CONVENTION

**October 28 - November 2, 2006**

Make your reservations **NOW**  
for Toronto, Canada.

NATA Members - Register Online Now  
at **WWW.natanet.org**

## CONFLICTS OF INTEREST

Gary S. Cohn, FTA, Executive Director, Congregation Emanu-El, San Francisco, CA and Immediate Past President of NATA



The adoption of Sarbanes-Oxley in the business world and the Non-Profit Integrity Act in California are not really signs of change. But they are a wake up call: a realization for many businesses and non-profits that the way we have been doing business needs to be re-examined. We should operate our synagogues as part of the non-profit sector, based upon Jewish ethics and values. Acknowledging Conflicts of Interest is one way to remind us that we work in a fish bowl, with temple members and the community looking in. There are two areas that we will cover in this article. The first is the traditional Conflict of Interest that every board member, corporate or non-profit, should be aware of. The second is the Conflict arising out of relationships with temple members who may be or become vendors.

We will explain and define the term Conflict of Interest and then review policies and steps to be taken to mitigate the situation. Let's start with a sample Conflict of Interest policy.

### WHAT IS A CONFLICT OF INTEREST?

Recognizing that it is not possible to describe all possible conflicts of interest that could develop, some of the more common conflicts from which an Employee or Trustee, or someone with whom the Trustee has a close personal relationship (such as a member of the Trustee's immediate family or another member of the Trustee's household) should refrain include the following:

1. Accepting personal gifts or entertainment from vendors of Temple B'nai Kesef ("TBK") or any other person or entity that has entered into a contract with TBK;
2. Using proprietary or confidential TBK information for personal gain or to TBK's detriment;
3. Having a direct or indirect financial interest in an activity undertaken by TBK;
4. Using TBK assets or labor for personal use;
5. Holding, directly or indirectly, a position or a material financial interest in any outside concern (1) from which TBK secures goods or services (such as legal, accounting, investment or real estate), or (2) which provides services in competition with TBK;
6. Competing with TBK, directly or indirectly, in the purchase or sale of property rights or interests;

The following cases illustrate the existence or absence of a conflict of interest:

1. A business transaction between Trustee and TBK, such as an agreement by the Trustee to perform legal, accounting or money management services for a fee, poses a conflict of interest. Thus, the Trustee's voting on the engagement or attempting to influence it is prohibited.
2. A Trustee owns a business, which performs services for TBK for more than a nominal fee even though the Trustee may not personally perform the services. A Trustee sells products to TBK. A conflict of interest is created by the foregoing because the Trustee

shares in the profits from the transaction and therefore has a material financial interest in the transaction. Thus, the Trustee's voting on the engagement of services or attempting to influence the decision is prohibited.

3. A Trustee owns 1% of the outstanding shares in a publicly traded company whose business activities with TBK have no significant effect on the financial performance of the publicly traded company. This does not create a conflict of interest.

4. A Trustee owns land, which will increase significantly in value if TBK acquires adjacent property. The Trustee has a material financial interest in the acquisition of the adjacent property. Thus, the Trustee's voting on the acquisition or attempting to influence it is prohibited.

### PROCEDURES TO RESOLVE CONFLICTS OF INTEREST

The following procedures will apply to the resolution of any conflict of interest which cannot otherwise be avoided:

1. Any potential conflict of interest that may affect a matter under consideration, including the existence of common Trustees with an entity, which will engage in a transaction with TBK, shall be disclosed by the Trustee to the Board of TBK and made a matter of record as soon as the possible conflict is determined.
2. The interested Trustee shall neither vote on such matter, nor attempt to exert influence in connection with the matter during the Board deliberations regarding the matter.
3. The minutes of the meeting shall reflect (1) and (2) above.

With respect to any matter in which a Trustee of TBK has a financial interest, the following additional procedures shall apply prior to TBK entering into the transaction

- (a) The Board of Trustees of TBK shall determine in good faith that TBK will enter into the transaction for its own benefit;
- (b) The Board of Trustees shall determine in good faith that the proposed terms of the transaction are fair and reasonable to TBK; and
- (c) The Board of Trustees shall determine in good faith after reasonable prior investigation that TBK could not have obtained a more advantageous arrangement with reasonable effort under the circumstances.
- (d) The transaction may be considered for approval by the executive Committee of the Board of Trustees, rather than the full Board of Trustees only if:
  - (i.) It was not reasonably practicable to obtain approval of the full Board of Trustees prior to entering into the transaction; and
  - (ii.) The board of Trustees after determining that the conditions of sections 4(a) and (b) above were satisfied, ratifies the transaction at its next meeting following approval by the Executive Committee by a vote of a majority of the Trustees then in office without counting the vote of the interested Trustee.

4. These Conflict of Interest Policies and Procedures shall apply to the members of a committee of the Board of Trustees as if each committee member was a Trustee.

continued on page 15

**REQUIREMENTS**

1. The Executive Committee of TBK shall sit as an ethics committee.
2. Each Trustee shall be advised of the Conflict of Interest Policy and Procedures prior to commencement of the Trustee's term of office.
3. Each year each Trustee must sign a Conflict Disclosure form (attached) to be delivered to the Corporate Secretary by July 31 and kept with TBK's records.
4. Any person who has knowledge of any action or conduct that appears contrary to these Conflict of Interest policies and procedures shall report the same to the President of TBK.
5. If a Trustee or someone with whom a Trustee has a close personal relationship (such as a member of the Trustee's immediately family or another member of the Trustee's household) has, or has had, a financial, employment, or close personal relationship with a vendor to TBK (or any other person or entity that has entered into a contract with TBK), the Trustee must disclose this fact in writing to the Corporate Secretary on the form described in (2) above.
6. A Trustee who is unsure as to whether a certain transaction, activity, or relationship constitutes a conflict of interest should discuss it with the Executive Committee of the Board for clarification. Any exceptions to this policy must be approved in advance by the Board of Trustees.

The above policy has been created from an assortment of policies. Some organizations write policies that are real specific and others that are more general. In either case, it is incumbent upon the governing board and the Executive Director to exert the utmost care and attention to the subject.

**Vendor Relationships**

There are some synagogues with written and unwritten policies regarding doing business with a temple member. While some synagogues see some benefit in pro-bono or discounted work, others see the long term destruction that working with a temple member may create. Here we shall look at the pros and cons of doing business with a temple member. In the end, each synagogue must decide how the scales are balanced.

**The Pros:**

**We will save money by having it done pro-bono.**

Volunteer hours are much less expensive than regular paying professional fees. Our member is an attorney who loves the temple. But the questions to ask include: Does he or she have the expertise in the area that the temple needs? Will the temple be a high priority for the lawyer?

**We will get a great "deal" from the member who can sell it to us at a discount.**

We can get better pricing if we buy it from our members. But questions to ask include: If the member is not getting their regular mark up, will the quality be as good?

**The member has the temple at heart and will do nothing to harm us.**

This is one area to which everyone turns a blind eye. If Harvard had 500 graduates, one is at the top of their class and one is at the bottom. How do you judge the ability of

your member offering to do something for free? Too many temples have fallen under the misconception that because a member volunteers to help, they must be good at what they do.

**The Cons:**

**When you pay for something like legal work, you set the timeframe within which the lawyer must perform.**

**When it is pro-bono you lose some control. Paying customers will always come first.**

I have always found that the paying client always comes first. If we are under a time frame and need something fast, I always pay for the service.

**The member has the temple at heart and will do nothing to harm us.**

This is both a pro and a con and the comments mentioned above cover this well. I listed it again, to emphasize the problems this statement can bring us.

**If the member does not perform, you will have a difficult time suing the member to enforce a contract or exact performance.**

There is nothing like a really happy temple member who ends up not performing for the temple. What can you do as the temple administrator or as a board member? If the vendor is a stranger, you can use the weight of the law to collect damages or elicit performance. But will you sue a temple member? What if something goes wrong, two weeks before the 30 year member's daughter is to be married at the temple? There are so many pitfalls when using a temple member.

**If more than one temple member can offer the service or product, whichever one is not chosen will cause problems throughout the temple.**

This happened to us about twenty years ago. During an \$18 million dollar building project, the then temple administrator asked one temple member to bid on the kitchen equipment, but not another temple member. The member not asked could have been a big supporter, but instead turned into an enemy for years to come. It was only recently that we added his name back to his wife's membership and things are smooth once again.

It is never an easy decision when you deal with ethical issues. There are always two sides to view things from. The lens on the glass is not black and white but many shades of gray. Whether it is a possible conflict of interest or a relationship with a temple member as vendor, a policy in place beforehand will make your decision making much clearer, if not a little bit easier.

---

\*Excerpts of this article are credited to Mt. Zion Health Fund, Inc. and Ann Blumlein Lazarus, Executive Director (retired)

## TEMPLE B'NAI KESEF BOARD OF TRUSTEES

### POLICY: CONFLICT OF INTEREST

The policies of the Temple B'Nai Kesef Board of Trustees require regular disclosure of (1) your affiliations (as trustee, board member, officer, employee, advisory committee member, development committee member, volunteer, etc.) with any other organization with which TBK may have a financial relationship, and (2) the affiliations of persons with whom you have a close personal relationship (such as a member of your immediate family or a member of your household) with any organization with which TBK may have financial relationship. See the Conflict of Interest Policies and Procedures (for Trustees).

Please complete this form and return it to the Corporate Secretary by July 31. Note your continuing responsibility to advise the Corporate Secretary of additional affiliations as you undertake them.

Your name: \_\_\_\_\_  
(Print)

Sign: \_\_\_\_\_

Date: \_\_\_\_\_

<u>Business/Organization</u>	<u>Nature of Relationship</u>	<u>Dates of Relationship</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Exhibit A

## 2005 NATA Award Winners

### **Alan Merton Samuel - Service to Community**

Alan was nominated by his Rabbi for his involvement with voluntary community work dating back to his teens. His Rabbi, Fred Morgan, says that he brings generosity of spirit and total commitment to everything that he undertakes. Some activities are: Volunteer at Boys Town Orphanage, Justice of the Peace in Queensland at age 21 until he moved to Victoria four years later then later reappointed Justice in Victoria; volunteer at a local prison farm.

### **Roy H. Feinberg - Service to Judaism**

Roy was nominated by his senior Rabbi and President for exemplary service to the Jewish Community of greater Philadelphia, including: URJ camps, UJA, youth groups and politics. He currently serves on the URJ Regional Camp Committee for Camp Harlam.

## Professional Temple Administration and the beginning of naTa

Steve Breuer, Administrator Emeritus, Wilshire Boulevard Temple, Beverly Hills, CA, Past President of NATA 1992 - 1996



Since the inception of the synagogue, over 2500 years ago, that remarkable institution has been pivotal to the lives of Jews and has sustained our faith. The synagogue provides an institutional body and precinct in which Jews can express our spiritual and communal identities. It is difficult to imagine the survival of Judaism without this extraordinary and flexible institution.

The earliest synagogues are believed to have developed in the Babylonian exile, when people of like backgrounds, who came from the same village or followed the same trade, gathered for security, fellowship, and to pray to their God. The synagogue's most distinguishing characteristic was the autonomy of each one. From the very beginning, each *kehillah* (community) was self-sufficient and self-governing. The members of each *kehillah* comprised the membership of its synagogue and were bound to the Temple in Jerusalem by sentiment and symbol rather than in reality.

Typically, each community was governed by a local council, which concerned itself not only with the functioning of the local synagogue, but also maintained control of the secular affairs and social welfare of each community.

After the destruction of the Temple in Jerusalem, there was no longer a focus on Jerusalem, and the synagogue became the focus of Jewish communal life throughout the Diaspora. Rabbis, whose authority came from the *yeshivot*, academies of Jewish learning, became the central functionaries of the synagogue. Rabbis were learned in the tradition and the Law, serving primarily as teachers and judges rather than as leaders of worship. Rabbis performed no priestly functions.

Lay leaders organized a number of communal functions through the synagogue. The synagogue provided the administration of justice; provision of burial service and cemetery space; care for the sick and the needy; provided orphanages and old age care; solicited funds for captives; provided dowries for brides; operated slaughter houses and prisons.

Administrative responsibility for these functions in the autonomous synagogues was given to lay directors known as *parnossim* (functionaries) or *gaboim* (treasurers). They were selected either democratically or appointed by the oligarchic leadership. Other functionaries were the *shochet*, (kosher butcher), the *hazzan* (cantor) and the *mohel* (one who performs ritual circumcisions).

Originally, all the functionaries were not paid. They earned their livelihood elsewhere as artisans, tradesmen, or professionals, offering their special skills to the synagogue gratis. By the 13<sup>th</sup> century, the position of rabbi had evolved into a full-time role, supported by the synagogue community. The rabbi was the first communal professional to be financially supported by the congregation.

As communities and congregations grew, their synagogues

grew as well. An additional paid employee of the synagogue was the *shammash* or server, often a non-Jew who could kindle the fires and light the lights on Shabbat, since it was against Jewish law for a Jew to perform those functions that were considered work. Cleaning and basic maintenance were his responsibilities. Depending on his abilities, he may have been assigned other duties. If he was Jewish, he often performed preparation of the deceased for burial.

We may imagine the structure of the isolated Jewish communities – the images of the shtetl have been woven into our consciousness by Chagall's paintings and Sholom Aleichem's tales – but many Jews lived in urban centers. There they worked in the trades, in medicine, and particularly in finance. Some Jews occupied the role of seneschal – the chief financial officer of the local noble.

It is not surprising that the consciousness regarding administration became part of the Jewish community. What is surprising is that the administrative functions took so long to become professionalized.

The synagogue reflected its setting. In a smaller community, services of the synagogue remained the responsibility of lay volunteers. As an individual synagogue grew, the institution followed the pattern that remains familiar today. A permanent rabbi was retained. Some sort of administrative assistance came in the person of a *shammash* or secretary. A cantor was added. Schooling of children remained the province of the rabbi, or an aide, as membership grew.

During the twentieth century, both administrative and educational functions became identified as Jewish professions. Lay persons with Jewish knowledge were the mainstays of synagogue Hebrew and religious schools (Saturday/Sunday/or after-school weekdays) before Jewish colleges began preparing professional educators.

Growing synagogues recognized that the rabbi could not fulfill all the administrative needs in addition to his pastoral, educational and liturgical responsibilities. Congregations in the Reform and Conservative movements with sufficient memberships sought out experienced persons with business experience to serve as administrators – “secretaries” to the congregation. These Temple Secretaries administered physical plants, staffs, significant budgets and investments, financial relations with members. Working in concert with rabbis, cantors, educators and the Temple Board, administrators demonstrated skill in serving their multiple constituencies.

Reaching out to one another, these Secretaries formed a new professional group, ultimately known as the National Association of Temple Administrators.

In April of 1941, seventeen professional secretaries of major congregations met to form the National Association of Temple Secretaries (NATS), “to provide fellowship and mutual support in their efforts to improve synagogue management.” Irving I Katz

of Temple Beth El in Detroit, organizer of the group, was elected the Association's first president. A number of these men had been on the job for years. S.D. Schwartz, for example, began his work as administrator in 1914! On April 30, 1941 the Union of American Hebrew Congregations (UAHC) formally recognized NATS as an affiliate.

In 1943, NATS offered field service to those congregations without professionals. The organization's publications committee was established to prepare manuals on matters pertaining to synagogue management.

A "Synagogue Administration: Institute for Temple Secretaries" was offered by NATS in June, 1946, in Cincinnati, Ohio. Led by a NATS founder S. D. Schwartz, NFTS offered an "Institute for Training Executives in Synagogue Administration" in New York City during the summer of 1947, "under the auspices of the Hebrew Union College School in cooperation with the Union of American Hebrew Congregations." *Papers* and *The Proceedings* of those Institutes were the first publications of NATS.

In 1951, led by President Max Feder, the NATS Board decided to hold annual conferences. Thus, in 1952, the First Annual Workshop Conference was held in Chicago, Illinois. In 1953, the NATS Annual Conference was held proximate to the UAHC Biennial, a pattern that has remained in place ever since. In non-biennial years, the Association meets independently.

The first of eight "Congregational Surveys" were published by NATS in conjunction with the UAHC. Produced by Max Feder, the first were *Congregation Budgets and Membership Income* and *Religious Services and Ceremonies*. There followed, in 1957, *Congregation Boards and Committees* and, in 1958, *Temple Facilities and Their Uses*.

At their 1956 meeting in Kansas City, NATS members met with former President Harry S. Truman at the Truman Library in Independence, Missouri.

In 1957, the Union of American Hebrew Congregations hired Myron Schoen to serve as Director of the Commission on Synagogue Administration. De facto, Schoen became "our man at the Union" and was pivotal to the development of the profession until his retirement in 1987. Louis J. Freehof was elected NATA President.

By the 1959 UAHC Biennial in Miami, Florida, NATS surpassed 100 members. The organization adopted a new name, becoming the National Association of Temple Administrators (NATA). At that UAHC Biennial the *Code of Ethics and Standards* was adopted, during the presidency of Nathan Emanuel.

The following year the fifth NATA Survey, *Cemetery Operations and Procedures*, was published. NATA offered a ten-week course in synagogue administration at the Hebrew Union College-Jewish Institute of Religion (HUC-JIR) building in New York City.

1961 proved to be an important year for the profession. Henry S. Jacobs was elected NATA President. NATA members adopted *General Principles for Professional Service and Standing*. At the annual NATA Conference, a certification program for Fellows in Temple Administration (FTA) was adopted. Under the

administration of a board composed of representatives from NATA, the UAHC, and the Central Conference of American Rabbis (CCAR), the certificate program requires a rigorous course of study, an examination and preparation of an original thesis. The sixth survey, *Temple Finances and Membership Income*, was published.

Two significant publications were produced in 1962. The book *Successful Synagogue Administration* by Irving Katz and Myron Schoen was published jointly by NATA and the UAHC. The first issue of *The NATA Journal* was published and distributed.

The following year fourteen candidates took and passed the first FTA examination. The seventh survey, *The Temple Program and the Temple Facilities*, was published, to be followed shortly by the eighth: *Senior Citizens Programs in Our Temples*.

In 1963 Frank Adler, FTA, became NATA president, to be succeeded in 1965 by Henry Fruhauf, FTA, who presided over NATA's twenty-fifth anniversary celebration. Upon the death of former NATA president Henry S. Jacobs, the UAHC regional camp in Cleveland, Mississippi was named in his memory.

Julian Feldman, FTA, Bernard Lepoff, FTA, David I Mitchell, FTA and Frank L. Simons, FTA were each elected for two year terms as NATA President in 1967, 1969, 1971, and 1973 respectively.

In 1971, at the Second International Conference of Jewish Communal Service, the role of Synagogue Administrator was recognized with a paper delivered by Myron E. Schoen. Further recognition came at UAHC biennials, where NATA members served as "tellers" at plenary sessions of the biennials.

Melvin S. Harris, FTA, became NATA President in 1975, to be succeeded by Walter C. Barron, FTA in 1977, and Henry Ziegler, FTA in 1979.

In 1979, the University of Judaism in Los Angeles first offered an M.A. degree in Public Management and Administration, with courses taught by NATA members.

After re-election as NATA president, Henry Ziegler died in office in 1981, his term completed by Shirley M. Chernela, FTA, who was elected to a full term in 1983.

The 1984 publication of *The Temple Management Manual*, edited by Julian Feldman, FTA, Henry Fruhauf, FTA, and Myron Schoen, FTA, by the UAHC Press provided a resource and reference guide for Reform congregations. 2000 copies were distributed nation-wide. A 200-page supplement, edited by Julian Feldman, was issued in 1988.

In 1984, in Philadelphia, NATA participated in a joint conference in conjunction with NAASE: the North American Association of Synagogue Executives, representing professional administrators of North American congregations of Conservative Judaism. Two years later, at another joint conference in Scottsdale, Arizona, the first joint *Professional Salary Survey* was presented to both organizations.

The NATA Placement Service for Temple Administrators was established at NATA's 1986 Conference in Scottsdale, Arizona, during the NATA presidency of Harold Press, FTA. It

was implemented in 1987, with former NATA President Henry Fruhauf, FTA, retained as placement director. Under the leadership of Treasurer Norman Fogel, a new, supportive NATA dues program was developed.

Ilene Herst, FTA was elected NATA president in 1987. NATA's Ilene Herst Memorial Educational Fund, supported by all NATA members, reflects her interest in NATA's ongoing in-service educational programs.

A recognition program for NATA members was initiated in 1988, including the Myron Schoen Service to Judaism Award, the Service to the Community Award and the Service to NATA Award. These awards have been presented to several dozen NATA members for their efforts well beyond their congregational work.

In 1990, led by NATA president Bill Ferstenfeld, FTA, the 1990 mid-year meeting of the NATA Board met at the Steve Breuer Conference Center in Malibu, California, named for a future NATA president. The mid-year Board meeting has met there ever since. In 2005, the Conference Center became the site for the NATA Institute – instruction and preparation for the FTA examinations. The Institute, first offered in the 1990s, had been held previously on HUC-JIR campuses, with participants living in college dorms.

In 1991, NATA advocacy helped initiate a Master of Arts in Communal Service with a specialization in Synagogue Management, offered at the Hebrew Union College-Jewish Institute of Religion at the Los Angeles, California campus. NATA provided scholarship funds, internships and instructors for the program, including NATA president Norman Fogel, FTA.

That year, NATA – now 350 members strong - celebrated the fiftieth anniversary of its founding with a gala dinner at Washington Hebrew Congregation in the District of Columbia, addressed by the UAHC president and chairman. NATA Past Presidents Frank Adler, Shirley Chernela, Julian Feldman, Bill Ferstenfeld, Norman Fogel, Henry Fruhauf, and Harold Press participated in the program, chaired by Steve Breuer, who was elected NATA president the following year.

In 1994, the NATA Consulting Service was initiated, offering the experience and expertise of NATA members to congregations with no or inexperienced administrators, in conjunction with the Office of Synagogue Management. Steve Breuer was elected for a second term as NATA president.

In 1995, Dale Glasser became the UAHC Director of the Office of Synagogue Management. Working with NATA leaders, the Office produced a number of valuable monographs on various phases of synagogue management, succeeding years. Fern Kamen, FTA, was elected NATA President and served for two successive terms. Ms. Kamen initiated an annual program of recognition of long-term service in the profession.

A new *Temple Management Manual: To Learn and To Do*, Dale Glasser, editor, published by the UAHC and NATA in 2003, combines these monographs and publications of the Department into a single comprehensive and indexed reference source. NATA president Elizabeth L. Hirsch, elected in 2001, wrote introductory remarks.

In 2003, Gary Cohn, FTA, was elected NATA President, having distinguished himself by effectively organizing NATA's financial position. He was succeeded in 2005, by Loree Resnik, FTA.

In 2006, in its 65<sup>th</sup> year, NATA is a dynamic partner in the Reform Movement. Recognizing that its members come from diverse backgrounds, the Association is committed to intense in-service programs, leading to status as a Fellow in Temple Administration (FTA). To that end NATA offers workshops and conferences, sponsors classes at the Hebrew Union College-Jewish Institute of Religion. Financial assistance for participating in NATA educational programs is offered to members through NATA's Ilene Herst Educational Fund and the Steve Breuer Leadership Fund.

NATA publishes articles and theses written by its members through the *NATA Journal* and on the NATA website. To aid Reform Congregations, NATA offers a professional Placement Service, Consulting Service. Daily mutual support is offered members through email conferencing.

NATA members sit on key committees of the Union for Reform Judaism, participate in missions to Israel, and assist Reform congregations in Israel, England, Australia and the Soviet Union. NATA annually selects philanthropic activities supported by member donations and efforts as its Mark Greenstein Memorial *Mitzvah* project.

With a membership of 361 active members, NATA at 65 is far from retiring, in fact is flourishing more than ever, to help its members achieve their historic mission – successful administration of the synagogue institution.

## NATA PLACEMENT SERVICE

Phone - 800-966-NATA

Fax - 360-887-1118

NATAORG@hotmail.com

**TEMPLE BETH SHOLOM**  
**4144 CHASE AVENUE**  
**MIAMI BEACH, FL 33140**

Non-Profit  
Organization  
U.S. POSTAGE PAID  
PERMIT No 18  
MIAMI, FL

**NATA and theURJ  
Ida and Howard Wilkoff  
Department of Synagogue Management  
are pleased to offer the**

### **CONGREGATIONAL CONSULTING SERVICE**

NATA members with longtime professional expertise in the field of temple management work with congregations, board members, and appropriate synagogue personnel. Recommendations or referrals to enhance operations are provided after consultation.

NATA members are available for consultation on:

- ◆ Membership: recruitment; retention; communications with members
- ◆ Organizational structure: boards and committees; bylaws; staff roles and structures; leadership development
- ◆ Finance: dues and system analysis; financial controls; budgets; financial statements; endowments; capital campaigns
- ◆ Facility management: insurance; catering; use of facilities transitions; personnel manuals
- ◆ Construction/remodeling: planning; financing; project management; controls Technology: telephones; computer hardware/software; office machines

The consulting fee of up to \$750 is waived for URJ member congregations. Synagogues are required to reimburse only the consultant's travel expenses.

Consultations may be requested by completing the form linked to the NATA web site (<http://rj.org.nata>). The completed form should be returned to the Office of Synagogue Management at the URJ. You can also contact Marc Cohen (at 414-3529288 or [marc@cong-shalom.org](mailto:marc@cong-shalom.org)) or Dale Glasser, Director of the Department of Synagogue Management, (at 212-650-4040 or [dglasser@uri.org](mailto:dglasser@uri.org)) for more information.