A REVIEW OF THE LEADERSHIP DEVELOPMENT PROGRAM

IN INDIANAPOLIS HEBREW CONGREGATION

by

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In Partial Fulfillment of the Fellow in Temple Administration Certification
Introduction

Indianapolis Hebrew Congregation (IHC) began its leadership development program seven years ago with the formation of a Leadership Development Committee. This paper seeks to document the successes and failures of the IHC program as a case history. This is not a model program to be emulated. It is a narrative which attempts to document the expansions and contractions of this leadership development program, its impact on Board member behavior, and the likely future direction in which it will move.

IHC is a large congregation of 1400 families. It should be said at the outset that IHC is an effective and dynamic congregation with many innovative programs that make it a Temple of distinction. Having said that, IHC has some problems in common with those faced by many other Reform Temples: Board members who do not participate in the religious aspects of the Temple, meetings which are ill run, Board factionalization along lines of self interest, difficult policy and financial decisions made by inexperienced and unknowledgeable people.

The impetus for the creation of a leadership development program was the perceived dwindling of qualified candidates for responsible Board positions, particularly that of president. This paper may be instructive for congregations that might be in the same situation.

Before continuing with IHC, let us go back to leadership development as perceived by UAHC.

Leadership Development Activities in UAHC

It is interesting to observe the movement of leadership in the for-profit sector. For generations the essence of leadership has been the directive, controlling behavior of the dominant male. Leadership has now taken a turn toward collaborative, team-centered, empowering behavior that favors the understanding and use of group dynamics. How refreshing to know that UAHC began training facilitators and Board members in the same leadership philosophy almost ten years ago. It was recognition of this change in the character of leadership that led IHC to embark on a leadership development program to bring Temple leaders away from confrontational and political practices and toward collaborative and consensus behaviors.
UAHC implemented a network of trained facilitators in 1983-4 to conduct full-day seminars for congregational Boards. The facilitators were trained themselves and conducted their training assignments within their own regions. The facilitators were drawn from those who had themselves been in leadership positions in their respective congregations so that they were able to draw from their own experience as well as on their new expertise in group processes.

Training of the facilitators was accomplished over a three-day period. Each person conducted two or three seminars during each year that they served. Literature was made available to rabbis and administrators to advise them of the availability of Board training. On being advised of the congregation's desire to have a seminar or retreat, arrangements were made through the Union's New York office.

Formation of the Leadership Development Committee at IHC

The idea for the creation of a leadership development program was a joint one made by the rabbi and the then president of IHC. The president had been elected a short time before and was concerned about the lack of modern leadership skills of those on the Board who might succeed him. In fact, both the rabbi and the president were fearful of the possible inability of the Board to handle issues of great importance because of the limited vision and experience of those left on the Board.

The rabbi and the president met with a person who was not a Board member but who was professionally involved with leadership training. The rabbi and the president presented a plan to that congregational member for the formation of a Leadership Development committee to be chaired by him. The purpose of the committee was to provide a means for developing people on the Board and from other Temple arms in leadership skills so that a ladder of succession could be formed with viable candidates for office. The three then proceeded to set up the committee.

The committee members were chosen on the basis of past service to IHC and as representative as possible of the age and gender makeup of the congregation. On the face of it this looks like a rational way to structure the committee. In retrospect, however, tapping all possible groupings in the congregational makeup may be politically correct but not necessarily correct for the tasks to be done. Even though the committee chair had recommended a maximum of eight, citing the
difficulty of making a larger group productive because of factionalization, the committee numbered eighteen at its first meeting. Over a two-year period the committee membership fell off, in fact, to the recommended level.

During this period, several attempts to conduct training sessions with the Board resulted in disappointing results. Feedback from Board members indicated that many felt that they were not in need of "training" but of information. This is a common misconception by people who are unused to any educational method other than the passive, traditional one of read, lecture, discuss. Many congregational members are entrepreneurs in their own businesses or professionals, such as physicians, dentists and lawyers. Very few are business and industrial managers who are familiar with management workshops that employ experiential activities. The idea of training in the skills that people must exercise in the performance of leadership roles is, therefore, not a familiar one for many. In many cases it is antithetical to closely-held beliefs about one's own ability to become successful, i.e., that success is based on one's being a leader already. The rabbi, in fact, was more in favor of developing a line of succession of identified "leaders" than of training people in leadership. The committee itself was divided on this issue, with at least two vocal members expressing a firm belief that leaders can only be discovered and not trained. Others on the committee held that if this is really the case then decades of leadership research and effort in training people to discover and use skills in leadership positions in business and industry are meaningless. In fact, the UAHC Taskforce on Leadership Development and its Manual for Facilitators is then meaningless, for this entire effort is based on skill building through training.

Lest the wrong impression be made, however, much valuable work was carried on by the committee during the first two years of its existence. A job description of a Temple Board member was created through collaboration with professional and administrative staff. From this job description a recommended procedure was developed for the nominating committee in their selection of candidates for election to the Board. (See the Appendix, pages 1 and 2, for the "Guidelines for Nominating Committees"). Each year the Leadership Development Committee brings copies of these guidelines to the Nominating Committee's first meeting and coaches the members on their use. Both of these documents emphasize commitment to Reform Judaism and to the Temple by required participation in services and Temple programming. Both of these documents were adopted by the Board as IHC policy.
Unfortunately, the Board policy was lip service. The extent of participation for a significant number of Board members continued to be the monthly Board meeting and the few committee meetings they were required to attend. The Nominating Committee continued to select candidates based on external status or perceived leadership ability and not on any Temple-based experience.

The turning point came after the Leadership Development Committee chairperson became a trained facilitator for the Midwest Region. The negativism of the committee was attacked by reforming the committee to include some key people. Those former members who supported training were retained. The committee was enlarged by inviting three past Board presidents, making the committee an oversight responsibility of a Board officer who became a member, and enlisting several business people who were familiar with management training in industry. The new committee's focus is now almost totally on development of leadership through training.

The Present Leadership Program at IHC

Realizing that current Board members are not favorably inclined toward full-day seminars or retreats, the Leadership Development Committee has settled on a quarterly, two-hour workshop. The Executive Board meets on the first Monday of the month and the Board of Directors meeting is on the third Monday. Accordingly, the second Monday of the scheduled month, four times a year, is set aside for the retreat.

After several meetings the committee decided that the most pressing topic areas for the Board were 1) the relationships between the Board members and the professional and administrative staffs, and 2) Board members' understanding of the Temple finances. The first was suggested by the Rabbi and the Executive Director for the beginning retreat because several misunderstandings and hurt feelings had occurred about the expectations and the perceived responsibilities of each group. The second topic was strongly suggested by the past presidents and the Board Finance Committee chairperson. Other Retreat topics were considered and deemed important by the committee, but postponed to later Retreats. Some of those topics were: running effective meetings, conducting Board meetings using parliamentary procedure, interpersonal skill building and communications skills.
The issues chosen for the first Retreats go to the heart of Board responsibility. Many on the committee felt that some Board members were antagonistic toward the Temple professionals because they discerned the Board responsibility to be day-to-day rather than policy making. Others felt the reverse to be true with day-to-day responsibility residing with the Rabbis, Cantor and Administrator. This dichotomy also was true among members of the Leadership Development Committee. It was obvious that a "clear the air" retreat would be helpful in examining just how each group viewed itself and the other.

In order to achieve a high attendance, the Leadership Development Committee chairperson addressed the Board two months ahead of the scheduled retreat, handed out a descriptive sheet of the plans for the two-hour session (see the Appendix, page 3) and circulated a signup sheet signifying the Board member's intention to attend. At the Board meeting one month before the retreat the committee chairperson addressed the Board a second time in terms of the Board members' commitment to attend. At this meeting the chairperson took the signup sheet directly to those members who had not yet signed and stood over each member until the sheet was signed. The ploy was crude but effective. The attendance at the first quarterly retreat was almost 100 percent.

The handout for the retreat is shown on pages 4 and 5 of the Appendix. The substance of that first evening was a clarification of roles. The design of the retreat was somewhat cumbersome, involving the use of breakout rooms and the scrambling of members of the different group members. While no breakthroughs in relationships were accomplished at this first attempt, the goals of "clearing the air" and allowing each group to clearly state its understanding of its own responsibility and its expectations of the others, were achieved. One other (unstated) goal was achieved. The time spent in this activity was worthwhile in the eyes of the Board. The retreat was started on time and ended on time and the participation of the Board members was high. Feedback was very positive.

The second retreat addressed the financial issues. This was a very difficult retreat to design and implement because the committee realized that the Board members were not likely to be excited by a recitation of accounting principles and largely uninteresting numbers. The committee came up with a case approach, whereby each table at the retreat would have a unique scenario involving a financial decision to discuss. Subcommittees were formed to write an adequate number of scenarios. It took several meetings of the committee to finalize the cases and to arrange
speakers for the technical side of the financial picture. It was an exciting time for the committee in the give and take building of this workshop.

The Leadership Development Committee members acted as facilitators at the individual table discussions from which the Board members generalized what they had learned from the particular scenarios. The facilitator for this retreat, as for most of them thus far, was the Leadership Development Committee Chairperson. The directions for the committee members serving as table facilitators is shown on page 6 of the Appendix and the cases the committee developed are shown on Appendix pages 7 through 10. Again, feedback on the retreat was very positive. In retrospect, the success in these first retreats was because of: 1) an interested and dedicated committee, 2) topical and dynamically designed experiences, and 3) topics that were of great interest to the Board members.

The following quarters saw retreats on meeting management, parliamentary procedure, and ethical decisions. Much criticism had been directed at Board members (including the president) for inefficient, frustrating and boring meetings, both at the Board and the committee levels. The Leadership Development Committee addressed this criticism by scheduling a series of retreats that sought to educate the Board in group processes and in leadership of small groups. The meeting management retreat featured a training video, *Meetings, Bloody Meetings*. The video and group discussions of past meetings are still being talked about by the Board members. Pertinent documents for this retreat are shown in the Appendix, pages 11 through 13. The following retreat featured two speakers from the Indiana State Parliamentarian Society who educated the group in *Robert's Rules of Order*. The final retreat in this series was on ethics and was designed with ethical dilemma scenarios (see the Appendix, pages 14 through 17. The last document is a directive method for working through an ethical dilemma that is an adaptation of the UAHC scheme from the *Ethics Handbook*). There was spirited discussion with the interesting result that the groups split evenly on their recommendations. Another interesting sidelight was that the committee was accused of withholding information at the retreat because an almost identical situation to one of the scenarios came up for discussion at the next Board meeting!

**Effect on Board Members and Officers**

During the time of the above quarterly retreats there has been a slow but steady decline in attendance. Those who do attend the retreats are enthusiastic
participants, but there is no doubt that commitment is fading. Those who put in their time on the Board without visible effect from the retreats probably have viewed non-participation as impolitic. Those for whom the retreats have been stimulating and worthwhile have tried to implement what they have learned. There are a few who have made spectacular turnarounds. One former member of the Leadership Development Committee who was a vociferous supporter of "if it ain't broke don't fix it" philosophy has come to be a vocal supporter of the retreat concept. But this is a very slow process. Each year there are a few new people on the Board who have not had the benefit of the interpersonal relationships that are built up through the retreats. Each year there are new faces in the congregation among whom there are a few who volunteer for committees. Their approach to participation often is based on outmoded, stereotyped behavior toward leadership.

**Effect on Staff/Board/Committee Functioning**

Board retreats have been attended by the professional and administrative staff of the Temple. All committee chairpersons who are not Board members have been invited to attend the retreats as well. Inasmuch as the retreats are designed for building appropriate skills, one would expect that some change in behavior would be evident. The changes thus far have been minimal. Although the retreat content enters often into conversation, actual changes appear to come about because a particular person comes into a position of responsibility. Whether that person is implementing a changed attitude toward Temple service because of the retreats or because he or she has an effective personality cannot be ascertained at this point. In a completely non-scientific and opinionated vein, it appears that this will always be so. The training may have to be of a cyclic nature, reinforcing lessons learned, presenting experiences for the uninitiated, always hoping for individual breakthroughs.

**Conclusions and Implications**

The Rabbi was absolutely correct from the very beginning about succession of leadership. It all begins as new Temple membership moves into committees. If leadership development is interpreted exactly as stated, i.e., *developing people into leaders*, then we must start with those who are not yet in leadership positions. If we provide these people with the skills to effectively harness the energies of others, even in the limited arena of a committee meeting, then we are empowering them to grow in capability. It is from these ranks of Temple membership that leadership development can really work, in causing change that can be felt in the years ahead when people with "people" skills move into Board positions.
We have all known those in positions of responsibility who do not function well as leaders. It is too easy to slip into stereotypical pronouncements such as "Sid is just not a leader." It is time to be more accurate in our assessments so that the situation may be fixed. "Sid" is in a leadership position. He does not have the skills necessary to function well. We can suffer through his tenure, or we can replace him, or we can train him.

The plan now is to continue with Board retreats. The strategy is to enlist the aid of the Board members themselves in designing programs that will give them the skills that they need. In addition, a program for committee members is now under way and the Leadership Development Committee is considering how to implement a skill-building program for new members of committees. In this effort a grass roots approach may be applied to leadership development.

Where does the Temple Administrator fit into all of this? At IHC the entire professional staff are members ex officio of the Board, and function as cognizant staff for standing committees. As such, the Administrator should (and does here) participate in the retreats, acting as a role model for the lay leaders. The Rabbi has been the cognizant staff person for the Leadership Development Committee. The Executive Director will now fill that role because of the importance of good lay leadership in Temple management. Leadership development is serious business. The future of the congregation is in the hands of the volunteers who people the committees and the Board. They should have the tools that go with the job.

The implications for other congregational attempts at leadership development are to maintain a positive attitude toward what appears to be rampant apathy. Board members will resist new commitments because most of them are already tightly scheduled. These are very committed Jews who view their service on the Temple Board as their contribution to Reform Judaism. Some suggestions for avoiding burnout: Emphasize helping them rather than training them. Lighten up. Don't preach. Disinterest will set in and attendance will dwindle, but don't give up. The effect of training is exactly the same on people on Temple Boards as it is in industry. It has a very short half-life and needs constant reinforcement. Use your creativity and hope that next year's new Board members will be more attuned to building a Temple Team.
APPENDIX
GUIDELINES FOR NOMINATING COMMITTEES

The Nominating Committee plays an awesome role in its responsibility to the Temple. The committee members must identify those who are most qualified to fill vacancies on the Temple Board of Directors and the Temple Board of Trustees knowing that these people will be the leaders of the congregation for several years. The Nominating Committee must view its task as a key event in the succession to office of our most dedicated congregants. In so doing, members of the committee should keep the following question in mind when evaluating each candidate:

*Can this person be considered for a LEADERSHIP position in this congregation?*

The following steps are recommended procedure in considering candidates for Board positions at IHC:

I. PREPARATION

Members should read the By-Laws of IHC, particularly those sections pertaining to their charge. These sections are:

- Article III, Sections 2 through 6.
- Article IV, Section 2.
- Article VII, Sections 1 through 3.
- Article IX, Section 2.

II. IDENTIFY CANDIDATES

1. Obtain an up-to-date list of committee memberships and Temple Arm Board memberships.
2. Contact two or three previous presidents for recommendations.
3. Contact the professional staff for recommendations.
4. Solicit from within the Nominating Committee itself for additional candidates.

III. QUALIFY CANDIDATES*

1. Identify those candidates who are perceived, or who are known to be willing to serve.
2. Address the following questions for reviewing the qualifications of all the candidates accumulated:
    a. How many years a member of IHC and other Reform congregations?
    b. How active in leadership positions within the Temple, as in committees or boards?
    c. How much participation in Temple programming, as Adult Education, Social Action, Chavurah, etc.?
    d. How active a participant in Temple worship services?
    e. What involvement in Jewish communal organizations?

3. Review candidates' involvement with other civic volunteer organizations that may be appropriate to the open Board positions.
4. Review candidates' professional/occupational experience that may be appropriate to the open Board positions.

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IV. EVALUATE CANDIDATES

Using the information accumulated for each candidate, evaluate them in terms of the following questions:

1. What kind of expertise does the Board require over the near future?
2. With the current composition of the Board, e.g., sex, age, profession/occupation, Temple experience, leadership experience, what can this candidate offer?
3. What are the candidate's strengths and weaknesses and how could they impact their possible Board duties?
4. Does the candidate demonstrate a commitment to reform Judaism?
5. Does the candidate possess the leadership skills of tact, communication, persistence in accomplishing tasks, initiative, creativity, flexibility, and sense of humor?
6. Does the candidate have the ability to make this time commitment?

V. INTERVIEW FINAL CANDIDATES

It is highly recommended that the Nominating Committee have a face-to-face interview with the final list of candidates. This will allow possible unknowns to surface through an honest discussion of what the Board positions entail. The candidate should be informed of the responsibilities of a Board position (using the Job Description: Board Member), with emphasis on dedication and commitment to the position, willingness to initiate and follow through on projects and policy decisions, thus being a working Board member.

*NOTE:

Elected candidates will be chairing committees and participating in Board decisions concerning Temple activities. It is vitally important that they be experienced and knowledgeable in these activities.

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IHC LEADERSHIP DEVELOPMENT COMMITTEE
First Quarterly Board Retreat

Thy Board and Thy Staff
They Comfort Me

OVERVIEW

The retreat is scheduled from 7:00 pm to 9:00 pm. During the two hours, you will be asked to share your thoughts within a small group and to come to a consensus on the issues you discuss.

OBJECTIVES

• To open discussion on the roles and responsibilities of Board members and Staff.

• To clarify effective communication channels within the Board and between the Board and the Staff.

• To stimulate definition of working relationships which may be unique to this congregation.

BEFORE THE RETREAT

Here are some things to think about before the retreat.

• Who determines IHC policy?
• Who implements IHC policy?
• What are the lines of authority at IHC?
• Where is there conflict between Board and Staff?
• What are the respective roles of:

  - Rabbi
  - Associate Rabbi
  - Cantor
  - Executive Director
  - Education Director
  - Preschool Director
  - Board President
  - Directors
  - Committee Chairs
LDC-1

THY BOARD AND THY STAFF
THEY COMFORT ME

Goals
This exercise will help to "clear the air" between groups in our Temple who have to work together. The format will enable you to develop an understanding and acceptance of each group and the roles that their members play in the Temple's operation. Finally, the clarification of each other's roles will create the basis for improvement in both inter- and intra-group relationships.

Process
Your facilitator will hold a brief discussion with you on the goals of this activity and the importance of role clarification to Temple functioning. At the conclusion of this presentation, the following process will take place:

1. Board members and committee chairpeople will remain in the Multipurpose Room where they will break into several small groups. The Staff members will go to a classroom assigned for this purpose. There you will prepare two lists by consensus involving authority, communication and roles in Temple affairs:
   a. What you think you know about the other group.
   b. What you need to know about the other group in order to work more effectively with it.

Prepare your lists individually for about ten minutes, then by group discussion, using your own notes. Use the flip chart paper and felt-tip markers to prepare your lists. Select a reporter to represent your group. You will have about thirty minutes for this activity.

2. Staff will return to the Multipurpose Room where lists of both groups are to be taped to the wall for presentation. One group will present its first list and will respond to any questions of clarification only. Others in the reporter's group may aid in the clarification. Then the second list will be presented in the same manner. The process will be repeated for the second group. (Twenty minutes)

3. The posters will be exchanged between the two groups and the Staff will return to their breakout room. Now both groups are to develop responses to the information it has received from the other group's presentation and from the questions directed toward its own presentation. (Twenty minutes)
4. The Staff will return to the main meeting room to join small groups as the facilitator directs. In these groups the responses are shared and discussed. (Fifteen minutes)

5. The Staff will meet in their breakout room to discuss the new information in the last step. The Board and Committee groups will do the same in the Multipurpose Room. From this data, each group will make up a new list of questions that it would like to ask the other group. (Ten minutes)

6. Everyone will now meet in a final plenary session in the Multipurpose Room. (Twenty minutes)
Facilitator Directions

1. Make sure that your table is equipped with resource materials:
   - Analysis of fund balances
   - Statement of income and expenses
   - Other financial statements

2. Distribute copies of your scenario.

3. Inform your participants that they have 45 minutes to analyze this hypothetical IHC financial situation and that they will present their analysis to the other groups. Select a recorder to place the information on flip chart paper. (PRINT IN LARGE LETTERS!).

4. You will need a spokesperson to report their findings. SELECT THIS PERSON NOW. (They may want you—politely refuse, you have another role).

5. Refer to the resources on the table, but DO NOT FEED INFORMATION to the group. You are responsible for keeping the discussion focused on financial matters, for maintaining some order in the discussion, and for ensuring that all have their say.

6. The objectives should be agreed upon by the group:
   - The amount of money
   - The timing of fund availability
   - The most likely and the most appropriate source(s)

7. Do not use voting procedure unless pressed for time. Instead, work for achieving consensus.

8. Be a timekeeper, a gatekeeper, a taskmaster, and a listener. Do not be a participant. (This is very difficult).

9. Thanks for all your help in the preparation and running of this workshop!
FINANCIAL WORKSHOP
APRIL 29, 1991

Situation: In response to the congregation's need to have ongoing projects that will generate income for the Temple budget, the Cultural Arts Committee has recommended that we have an annual Jewish Festival. This project would be large in scope, not unlike the annual Greek Festival. The committee also recommends that the first Jewish Festival be held in July, 1991.

The goal of the committee is to make this a well publicized and quality community event. The estimated expense for accomplishing this is $18,000.

Currently, the Foundation provides $1,000 (which is part of the Temple budget) for Cultural Arts programming. The Cultural Arts committee hopes that, as an annual event, the Jewish Festival will generate sizable income for the congregation. However, additional funds to serve as seed money are needed now to establish this.

The staff and all the appropriate temple committees are supportive of the proposed concept. At the January 21, 1991 meeting of the BOD the concept meets with approval. It is now the task of the BOD to find the funds needed to establish this project.

Action: You are to consider this committee proposal, evaluating its financial aspect. Where will you look for funding and how will you learn if funding is available from the sources? How will the timing and profit-or-loss aspects affect the board action? Use flip chart paper to document your findings and select a spokesperson to represent your group.
FINANCIAL WORKSHOP

APRIL 29, 1991

Situation: It is now September 16, 1991. You are seated in the Multi-purpose room at IHC attending the September meeting of the Board. The President has asked for the report of the Nursery School Committee which met last Thursday at 7:30 p.m.

The Committee chairperson makes the following report:

Mr. President, and members of the Board, it has been brought to the attention of the Early Childhood Committee that during the summer 16 Russian families have moved into the Indianapolis area. Five family circles have contacted Rabbi Stein during the last two weeks requesting permission to enroll seven children in the IHC Nursery School. No funds are available for tuition. The committee discussed the situation at great length and determined that to admit these children would require support for one additional teacher, supplies, and refreshments for the 1991-92 school year. The committee determined that it would cost the Congregation $3,100. The following motion was passed by the 11 committee members: That the Board of Directors of the Indianapolis Hebrew Congregation authorize the expenditure of up to $3,100 to allow 7 newly arrived Russian Jewish children to attend the IHC Nursery School during the 1991-92 school year.

The committee also requested an emergency meeting of the Executive Committee to hear this problem and to make a recommendation before the Board meeting. The President did not feel that was necessary, and that it could be dealt with at the Board meeting where the final decision would need to be made.

After much discussion the BOD voted to support the proposition of sending children to Nursery School. You now must decide where to find the $3,100.

Action: You are to consider this committee proposal, evaluating its financial aspects. Where will you look for funding and how will you learn if funding is available from these sources? Use flip chart paper to document your findings and select a spokesperson to represent your group.
FINANCIAL WORKSHOP
APOP 29, 1991

Situation: It is now September 16, 1991. You are seated in the Temple Multipurpose room where the September Board meeting is in progress. The president has just asked for the House Committee report:

Mr. President, the House Committee met last week and spent more than three hours finalizing our plan to make the Temple building and premises secure. As you all know, an outbreak of anti-Semitic vandalism has occurred in various parts of the country over the summer, including two instances in Indiana. In one case there were serious injuries to members of the congregational staff when a home-made bomb was set off in a synagogue office. Another case involved a brief intrusion during a Temple’s Friday night service where anti-Semitic slogans were spray-painted in the hallways of their building.

The House Committee reviewed the status of the present security system. The system consisting of a small monitor and two surveillance cameras, has not been operational for at least three years. To bring the system into operating condition and to meet our current security needs would require these steps:

1. Add two more surveillance camera stations so that all entries into the Temple building are covered.

2. Add a built-in monitoring console at the receptionist's desk in the Temple office so that all entries can be monitored continuously and simultaneously.

3. Extend the present silent alarm system to the receptionist desk.

4. Post an armed guard at the console for all evening and weekend functions that do not already employ sheriff’s deputies.

5. Hire and train a full-time receptionist for the Temple office.

The costs for the new cameras, including the wiring, are $1,500 each. The new monitoring console will cost $2,600, installed. The silent alarm system will be $200 plus a monthly fee of $25. Guard salary is expected to be $15.00 per hour with an average weekly requirement of ten hours. A full-time receptionist will require an annual salary of $12,000 plus benefits. The committee voted unanimously for the adoption of this plan, and we urge the Board to adopt it forthwith.

Action: You are to consider this committee proposal, evaluating its financial aspects. Where will you look for funding and how will you learn if funding is available from these sources? Use flip chart paper to document your findings and select a spokesperson to represent your group.
FINANCIAL WORKSHOP
APRIL 29, 1991

Situation: It is now April 15, 1991. You are seated in the Multi-purpose room at IHC attending the April meeting of the Board of Directors. The president has asked for the House Committee report:

Mr. President, the House Committee has met with several of our handicapped members, as recommended by the Executive Committee. Last month's accident, in which an elderly congregant fell while descending from the bimah, may result in a lawsuit against the Temple because of her injury. In addition, we have an irate wheelchair-bound congregant who may resign because of her difficulty in gaining access through the North-side doors. Our committee has determined that IHC's facilities for the handicapped need to be improved as follows:

1. A ramp with railing is to be installed on one side of the bimah to allow wheelchair access and for elderly or mildly handicapped members or staff to walk up and down safely.

2. The outside doors on both sides of the building and both levels need one door widened to accept wheelchair access, operated by a push-button, reachable by the disabled person.

3. A small elevator needs to be installed for handicapped access to both levels within the building.

The costs for these installations are estimated to be $20,000 for the ramp and door improvements and $50,000 for the elevator.

Action: You are to consider the committee proposal, evaluating its financial aspects. You know that the building fund has been tapped for a major roof repair recently. Where will you look for funding and how will you learn if funding is available from these sources? Use flip chart paper to document your findings and select a spokesperson to represent your group.
BOARD TRAINING EVENT PLAN FOR AUGUST 26, 1991

I. Intro to Session
   (10 Min)
   A. Overview of activities
   B. Questions/concerns on Ware Handout

II. Video "Meetings, Bloody Meetings"
    (40 Min)
    A. Video
    B. Review of Principles

III. Group Leader Skills Chalk Talk
     (15 Min)
     A. Balancing "People Agenda" with "Task Agenda"
     B. Five Principal Components of Meetings
     C. Handout Group Leader Skills List

IV. Satisfying Meetings
    (50 Min)
    A. Nominal group work on past meeting (select recorder and discussion leader)
    B. Group Discussion
    C. Nominal Group work on future meeting (select new discussion leader)
    D. Group discussion
    E. Table summaries by recorders
    F. Handout "Checklist"

V. Review and Closure
    (5 Min)
James Ware Article

Prepare for the Meeting
Set Objectives
Select Participants
Plan the Agenda
Do Your Homework
Set Time & Place

Conducting the Meeting
Review Agenda
Encourage Problem-Solving and participation
Keep Discussion on Track and on time
Exercise Appropriate Control of Discussion
Reach a Decision using group Consensus
Summarize and Schedule next meeting

"Meetings, Bloody Meetings"

Plan Objectives

Inform - What, why, anticipate

Prepare - logical order, timeliness

Structure or Control - Evidence, decision, Implementation

Summary and Record

Balancing Task Agenda with People Agenda

<table>
<thead>
<tr>
<th>People Agenda Agenda</th>
<th>Goals set by Board</th>
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<tbody>
<tr>
<td></td>
<td>Committee Goals</td>
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<tr>
<td></td>
<td>Objectives of Meeting</td>
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<tr>
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<td>Methods for achieving Objectives</td>
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</tbody>
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Components of Meetings

Sharing of Information
- for establishing climate
- for group decision making

Reporting on Progress
- positive and negative reports on actions taken
- reports on pertinent issues reflecting group's interests
- New information on important issue requiring action

Taking Action
- What has to be done now that a decision has been reached
- Who else has to be informed

Gaining Inspiration
- Successful achievement
- New perspectives on Temple responsibility
- Validation of personal and group effort
- Getting and sharing in recognition for work

Meeting Social Needs
- Making friends
- Experiencing acceptance of self and ideas
- Establishing warm and caring atmosphere
**Ethics**

eth·ics (eth'iks), noun pl., [construed as singular or plural], 1. the study of standards of conduct and moral judgment; moral philosophy. 2. the system or code of morals of a particular philosopher, religion, group, profession, etc. 3. the branch of philosophy dealing with values relating to human conduct with respect to the right and wrong of certain actions and to the goodness and badness of the motives and ends of such actions.

*Always do what is right. It will gratify most of the people, and astound the rest.*

—Mark Twain

*Source: Mark Twain, from an address to the Young People’s Society, Greenpoint Presbyterian Church, Brooklyn, New York, 16 February 1901.*

Philosopher’s Pie: Theistic and Nontheistic World Views
Situation: In September the Dues Committee reviewed a request by Frank G. to lower his family dues by 25%. Frank G. is a successful business owner who also has business and residential property in the Indianapolis area. His fair share dues have been paid by the end of each of the past two years but only after several letters from the Temple office. In support of his request, Frank G. cited several problems. These included unusual expenses involved with a son, decreased business income and capital improvements of several properties.

After some deliberation the dues committee agreed to the reduction of dues for Frank G.

You are on the Temple Board. Last month you were in Florida where you were looking at property in Ft. Myers. The real estate agent, knowing you came from Indianapolis, asked if you know Frank G. When you asked why, she said that he had just purchased a condominium.

Action: You are to consider the ethical issues facing you as a Board member. Use the Ethical Decision Making worksheet to determine the action that you decide to take? Complete your thinking on the worksheet before discussing this with your group. Use flip chart paper to document group findings and select a spokesperson to represent your group.
ETHICS WORKSHOP

FEBRUARY 10, 1992

Situation: Among the applications for membership that the Membership Committee has received recently is one from James S. and Harold R. The two men have been attending worship services regularly for the past six months and have been seeking information about serving on various committees and on joining Brotherhood. The men are living together in a house that they own in Carmel, and both are employed in professional jobs.

James and Harold are homosexuals. Their application is for a family membership, because they say that they are married.

The membership committee is hopelessly split on the processing of the application. The chairperson has requested that the Board act on the application as a committee of the whole.

Action: You are to consider the ethical issues facing you as a Board member. Use the Ethical Decision Making worksheet to determine the action that you decide to take? Complete your thinking on the worksheet before discussing this with your group. Use flip chart paper to document group findings and select a spokesperson to represent your group.
ETHICAL DECISION MAKING

a strategy

1. Define the problem. Be specific.

2. Do you have all the pertinent information? What else do you need to know?

3. Who are the parties that might be affected by your decision?

4. What are your personal values that you will apply in your decision?

5. What are the Jewish values that you may apply in your decision?

6. What are your choices of action? List all of the potential choices.