

Spring 2006

# The **NAASE** Journal

**A Forum on Synagogue Management & Leadership**

**3** *The Synagogue Director  
and Financial Development:  
Old Myths and New Realities*

*Establishing Visual  
Identity Guidelines for  
Your Congregation* **8**

**11** *The Executive Director as  
an Instrument of Holiness*

*Synagogue  
Membership Dues:  
Good News & Bad News* **18**



Published by

**NAASE**  
NORTH AMERICAN ASSOCIATION OF SYNAGOGUE EXECUTIVES  
**נעשה**  
Founded in 1948

**EDITORS:**

Bernard Goldblatt, FSA  
Adath Jeshurun Congregation, Minnetonka, Minnesota  
David I. Rothenberg, FSA, ATz  
Beth Israel Congregation, Owings Mills, Maryland

**EDITORIAL BOARD:**

Glenn Easton, FSA, ATz  
Harry Hauser  
Rebecca B. Holmes  
Malcolm Katz, FSA  
Gilbert Kleiner, FSA  
Marc M. Neiwirth, FSA, ATz  
Allan Ross, FSA  
Nadine Strauss

**HONORARY PRESIDENT**

Robert E. Hill, FSA  
Temple Emanu-El, Providence, RI

**PRESIDENT**

Glenn S. Easton, FSA, ATz  
Adas Israel Congregation, Washington, DC

**FIRST VICE PRESIDENT**

Neal Price, FSA, ATz  
Hebrew Educational Alliance, Denver, CO

**SECOND VICE PRESIDENT**

Michael L. Simmons, FSA, ATz  
Har Shalom Congregation, Potomac, MD

**THIRD VICE PRESIDENT**

Gilbert Kleiner, FSA  
Beth El Congregation, Baltimore, MD

**TREASURER**

Marcia Newfeld, FSA  
Ohr Kodesh Congregation, Chevy Chase, MD

**SECRETARY**

Malcolm Katz, FSA  
Valley Beth Shalom, Encino, CA

**BOARD OF GOVERNORS**

Irwin Davison  
Robert Festenstein  
Robert Fischer, FSA  
Sandra Galfond, FSA, FTA  
Bernard Goldblatt, FSA  
Sheryl Goldman, FSA  
Joel Don Goldstein  
Rebecca Holmes  
Kenneth Levin  
Marc Neiwirth, FSA, ATz  
Allan Ross, FSA  
Fred Rothstein  
David Rothenberg, FSA, ATz  
Nadine Strauss  
Miriam Telem

**PAST PRESIDENTS**

Joseph Abrahams\*  
Joseph Goldberg\*  
Abe Shefferman\*  
Gerald N. Schoem\*  
David I. Siegel, FSA\*  
Harold W. Hammer\*  
Max D. Weinles, FSA\*  
Abraham Stadlen\*  
Lionel Semiatin, FSA  
Howard S. Danzig, FSA\*  
Martin Leightling\*  
Doris Jaffe, FSA\*  
Burton D. Shanker, FSA  
Stanley I. Minch, FSA\*  
Charles Parmet, FSA\*  
Joseph M. Miller, FSA  
Leonard H. Smith, FSA\*  
Sanford S. Cohen, FSA  
Harvey Brown, FSA  
Thomas Jablonski, FSA, FTA  
Rhoda Myers, FSA  
Larry Trope, FSA  
Ralph Kirshbaum, FSA  
Janet Baron, FSA  
Amir Pilch, FSA  
Judith Kranz, FSA, ATz  
\*Of Blessed Memory

**EXECUTIVE DIRECTOR**

Harry Hauser

# Table of Contents

A Message from the President of NAASE <i>Glenn Easton</i> .....	1
B'reishit — The Beginning: A Message from the Editors <i>Bernie Goldblatt and David I. Rothenberg</i> .....	2
The Synagogue Director and Financial Development: Old Myths and New Realities <i>Amir Pilch</i> .....	3
Establishing Visual Identity Guidelines for Your Congregation <i>Robert D. Festenstein</i> .....	8
The Executive Director as an Instrument of Holiness <i>Marc M. Neiwirth</i> .....	11
Teshuvot by the Committee on Jewish Law and Standards that Affect Synagogue Management: What Does the Executive Director Need to Know? <i>Rabbi Joel Roth Responds</i> .....	15
Synagogue Membership Dues: Good News & Bad News A Need for New Synagogue Membership Focus and Funding <i>Glenn Easton and Marcia K. Newfeld</i> .....	18
The Lay/Professional Partnership: Working Toward a Congregational Model <i>Caroline Musin</i> .....	21
Sof Hadavar — End of the Discussion: Money in Synagogues: Guest Commentary by Rabbi Mordechai Liebling .....	25



*North American Association of Synagogue Executives  
is affiliated with United Synagogue of Conservative Judaism, the Jewish Theological  
Seminary of America, and the Jewish Communal Service Association*

The NAASE Journal is published by the North American Association of Synagogue Executives (NAASE) as a forum for sharing ideas about synagogue leadership and management. The opinions and points of view expressed in the articles presented in this publication are those of the authors, and do not necessarily represent or imply agreement with the positions or viewpoints of NAASE, its officers, staff, members, or the synagogues that employ our members.

The NAASE Journal welcomes submission for consideration manuscripts and articles that may be of value to synagogue executive directors and others interested in synagogue management and leadership. All material to be considered for future issues should be sent to NAASE via [office@naase.org](mailto:office@naase.org), or sent to The NAASE Journal, c/o NAASE at Rapaport House, 155 Fifth Avenue, New York, New York 10010.

# A Message from the President of NAASE

Glenn S. Easton, FSA, ATz

1

According to the Wikipedia Free Internet Encyclopedia, a profession is an occupation that requires extensive training, the study and mastery of specialized knowledge, an ethical code, a process of certification, and usually has a professional association. Historically, the number of professions was limited to members of the clergy, medical doctors, lawyers, and military officers. By extension, synagogue administration is one of the oldest sacred professions, dating back to the time of Moses, and by definition, synagogue executive directors are valued professionals.

For decades, the North American Association of Synagogue Executives (NAASE) has taken seriously “the study and mastery of specialized knowledge” in our field through the publication of The NAASE Journal. What separates our profession from many others is the wide breadth of areas and knowledge required to be successful in our craft. This issue of The NAASE Journal is an excellent example of the broad range of expertise and wisdom demonstrated by the authors and the readers of our journal. The combination of articles in this issue demonstrates the complete spectrum of understanding and skills needed by today’s synagogue executive director.



Glenn S. Easton

From examining the holiness of our roles to the mundane issues of funding and contracts, from divine standards to human partnerships, this edition of our journal is another example of NAASE serving its members, further developing our profession, and sustaining the synagogue as the center of Jewish life.

*Yasher koach* to our editors, editorial board, and contributors. ■

Glenn S. Easton, FSA, ATz  
NAASE President  
January 2006 Shevat 5766

## ABOUT THE COVER

How we chose the cover illustration for the Journal, and why we chose it, probably needs some explanation. Our intention was to put a photograph or illustration on the cover that would make a statement, visually, about some aspect of what the Journal represents, or what we as synagogue managers do. With very open and creative minds, we sorted and scanned thousands of images using keywords we thought were typical of our profession. After selecting some twenty interesting images, we took an informal “vote” of some of the editorial committee and NAASE leadership, picked four, and then began drafts of the cover design. For various reasons, this image, simply titled by the artist as “Juggling Man Balancing on a Chair,” evoked a lot of conversation. And so it became the cover.



A juggling, precariously balanced businessperson on the roof! Sounds crazy, no? But in our little village, each of us is like the man on our cover, trying to keep a dizzying array of things moving, simultaneously... and – IT ISN'T EASY. Synagogues are busy places and we have to be proficient in a wide variety of disciplines in order to keep them running. (By the way, it would not be surprising if some of us have been on the roofs of our facilities for one reason or another). This issue of the Journal, like those that have come before, showcases some of the knowledge and expertise required to manage the 21<sup>st</sup> century synagogue, as well as issues with which we struggle. And – there are so many other disciplines and topics that deserve to be covered in this publication.

According to our image service provider, had you been searching their image library, any of the following words would have brought you to this illustration – businessperson, executive, busy, control, balance, at-the-top, frenzy, overwhelmed, overworked, juggling, humor... can you relate? ■



## B'reishit: The Beginning A Message from the Editors

Bernie Goldblatt, FSA and David I. Rothenberg, FSA, ATz

בראשית



Bernie Goldblatt

The overwhelming majority of us came to synagogue management from someplace else. That someplace else may have been from a career path that was going in a completely different direction. For others, synagogue management might have been a logical progression from similar positions in the wider world of business management or Jewish communal service. Still, there is a small group of us who have spent entire careers, straight out of college, as synagogue professionals.

Our professional association, NAASE, gives us the forum for sharing our experiences as executive directors, as well as the expertise we bring into the field from wherever it was we were before. From feedback about the NAASE University program at our Annual Conference, we clearly enjoy learning from, as well as sharing, the diverse experiences and expertise in our midst. The NAASE Journal has always been another way to further share with each other. And this latest edition continues that tradition.



David I. Rothenberg

When asked to edit and reinvigorate The NAASE Journal, we agreed from the outset that we wanted the publication to continue to be an extension of our dialogue. But we also felt that this publication can have a broader impact as a forum for sharing ideas about synagogue management in the 21<sup>st</sup> century. Therefore, this publication needed to have a blend of voices – but not just those of the diverse experiences of our colleagues within the field. We also wanted friends of NAASE who come from outside our ranks but who share our commitment to synagogue life to “have a place at the table,” as it were. Our worldview is enlarged, for the better, by the perspectives of those who see synagogue management from the outside looking in. We are honored that Rabbi Joel Roth, Professor at the Jewish Theological Seminary and frequent participant in our annual Week of Study at JTS, took the time to participate in a “Q & A.” And with this issue we are reserving the last page for guest commentary, which we fittingly call “Sof Hadavar” – as in “*sof hadavar, hakol nishma*” (“The end of the matter – when all is said and done...” – Ecclesiastes 12:13). Rabbi Mordechai Liebling has the last word in this issue.

Clearly, to grow as synagogue executive directors we need to be open to both our colleagues and to others for inspiration. We hope, as you look through this issue of the Journal, that you find thought-provoking ideas and perspectives on a diversity of topics.

We are grateful to the many colleagues and friends who embraced our vision for the Journal and enthusiastically provided input or material for us to consider. We are thankful for the support of the NAASE officers, Board of Governors, and those who volunteered to proofread and be on our “Editorial Board.” We were overwhelmed by both the quantity and quality of the manuscripts submitted. *Yasher Koach* to the authors of these worthy articles. We were pleasantly surprised to find that we did not have enough space to include everything submitted to us for consideration. However, we now have a nice backlog, the makings of another great issue. And – if this issue gives you the incentive to submit an article or paper for us to consider, so much the better. We enjoyed putting this issue together, and we look forward to the opportunity to do the next one.

**ברוך אתה ה' א-להינו מלך העולם, שהחיינו וקימנו והגיענו לזמן הזה.**

You are blessed, Lord our God, ruler of the universe, for keeping us in life, for sustaining us, and for enabling us to reach this moment.

Read on. Enjoy. ■

Bernie Goldblatt, FSA & David I. Rothenberg, FSA, ATz  
Co-Editors  
The NAASE Journal – Spring 2006

# The Synagogue Director and Financial Development: Old Myths and New Realities

Amir Pilch, FSA

3

*Editor's note: The following article is an adaptation of the author's presentation given at the 2005 NAASE Annual Conference in Israel, the annual Irma Lee Ettinger Memorial Lecture.*

It is with pride and humility that I accepted your invitation to present the annual NAASE Irma Lee Ettinger Memorial Lecture. Irma Lee (z"l) was my mentor for a number of years in the early eighties. She nurtured and crafted my abilities, gave me confidence and transmitted to me her years of experience in synagogue administration. Her memory is a beacon of light. She was our modern day Bezalel using insight and great vision in building and renovating her congregation.

## The Golden Rule

It was Irma Lee Ettinger who first said to me, "Amir, don't you know the golden rule? He who has the gold, rules." She was referring to the politics and people skills necessary in fostering and developing members who were affluent and could help her accomplish her visionary agenda for her North Hollywood, California synagogue, Adat Ari El.

After a couple of years in the field, I realized that the greatest obstacle I faced in accomplishing my goals for my synagogue was a lack of funds. Therefore, I decided that I had to develop my skills in the art of fundraising and development. This presentation will cover two topics. The first is the nuts and bolts that I believe are essential for the synagogue executive director to become a proficient fundraiser, and the second, how philanthropy today in synagogues is more challenging and more complicated than in the past. This is due to a change in generational mores and values, as well as the ever-changing technological advancements in our society. With proper tools an executive director can develop himself or herself into a synagogue builder. The alternative in many cases is, unfortunately, the compacting of the executive director's position so that his or her job morphs into that of an executive office manager.

The last NAASE Synagogue survey<sup>1</sup> showed that when synagogues are faced with the need to mount a capital building program, 26% of them turn to development personnel. They either add a director of development to their staff or hire a development company to implement the drive. Why are so many synagogues doing this? Simply, because we as executive directors either

don't have the time, or the inclination, to step forward. "Naase V'Nishma," we will do and we will hear (Exodus 24:17); but, "Im lo achshav, aimatai," if not now, when? (Pirke Avot 1:14). The time has come when our professional development and growth must shift its priorities to meet the needs of the 21st century synagogue. The executive director should be well-positioned to develop the kind of relationships with the membership of his or her congregation needed to be a fundraiser.



Amir Pilch

## Developing Relationships with Your Constituency

The establishment of an endowment is the simplest and easiest of all development vehicles to enable your synagogue to remain on sound, fiscal ground in perpetuity. Jews from all economic levels and generations can leave a bequest in their will. Yet, in the recent NAASE survey<sup>2</sup> published in the fall of 2004, the average synagogue has around 800 member families, and only about \$2 million in endowment fund principal. The national average budget for synagogues is about \$2 million dollars. Therefore, at an average 6% return, synagogues are receiving only perhaps 5% of their income, if that, from endowment interest. Can it be that 95% of all Jews who die leave nothing for their synagogue? Absolutely, and it is our fault, and the fault of our current leadership. How many synagogues have active planned giving committees? So few, yet planned giving is a key to our financial future.

There is no question that to be a successful synagogue executive director you must develop highly positive relationships with your members. I have always said that 90% of being an effective executive director has to do with developing and maintaining excellent people skills. John Ruskay, in his article "From Challenge To Opportunity - To Build Inspired Communities,"<sup>3</sup> talks about developing portals of entry into the organization. It is all well and good to have portals of entry into active participation in the synagogue. But what portal of entry exists for a member to find a pathway to the executive director? Surely, we all know the obvious, but it is worth suggesting that executive directors should attend all funerals and make *shiva* visits when there is a death in a member's family. Executive directors should also attend *simchas*, with or without an invitation, and find a way to have his or her presence felt there as well. Members need to feel that the executive director cares about them and

is accessible. Weddings, a *brit milah*, hospital visits, anniversaries, and birthdays are all occasions to reach out to members. Yes, I went to hospitals to visit members, with my Rabbi's blessing. Yes, I led davening at *Shiva* homes, with my Rabbi's blessing. I found that teaching adult education classes, adult Bar-Bat Mitzvah preparation, and leading a minyan helped tremendously in the bonding process with my synagogue constituency. A well-timed phone call, a letter, a card, or a visit is a must. Reaching out and giving members many portals of entry beyond the financial and administrative duties of your position guarantees friendships, acquaintances and supporters. Bonding with members is the most important building block in becoming a synagogue executive director who is a strong fundraiser.

of Jews relate to the synagogue. Historically, the older generation - the World War II era generation - gives more money and they expect less hands-on involvement to their philanthropy. The older generation of World War II sacrificed as a group for the betterment of the whole community. But they have been giving way to the Baby Boomers and Gen-Xers. The transfer of wealth under way in this country is estimated at \$40 trillion.<sup>4</sup> According to Shirley Sagawa,<sup>5</sup> while most of the buzz is about the new wealth, the vast majority of wealth is not new. Before recent stock market growth and the dot-com phenomenon magnified the numbers, society was expecting the largest intergenerational transfer of wealth in history from the World War II generation. Whether the final number is \$10 trillion or \$120 trillion, the fact remains that hundreds of thousands of Americans are expected to or are now inheriting substantial sums of money.

As we attempt to bond with new wealth - the rising entrepreneurs - we will find that they, as a group, are a much more self-focused, "me" generation. They will demand to be educated in the needs and causes of your synagogue before agreeing to participate, and in return they will expect hands-on involvement and accountability. This younger generation must be informed about the opportunities for their giving and see how it can make a significant difference. They will want to experience a process of self-discovery before they are open to major solicitations. The question is, will they come out of the process wanting to accomplish something great?

Will your shul get its share as the wealth shifts from generation to generation, *midor l'dor*? Regarding the new generations, Sagawa continues to explain the following differences<sup>6</sup>:

- **Hands-On Style** -- Fundraisers and experts have commented for years on the increased interest of many new, younger donors and board members in being hands-on and involved in their philanthropy. Many of these new donors have been quick to recognize that adding their personal knowledge and expertise is both more valuable and satisfying than simply making gifts and grants. The increased interest in venture philanthropy is further evidence of this characteristic.
- **Directing/Controlling Gifts** -- Consistent with the hands-on approach of many new donors is the tendency of some to direct or restrict their gifts.
- **Inherited vs. Earned Wealth** -- The understanding of the basic differences between inherited vs. earned wealth is critical. Inheritors of wealth, be it through birth or marriage, often behave differently than



### Reaching Out to Different Generations of Members

Before reaching out to our potential donors, we must understand our target audience or audiences. Old and new money givers are products of their times. There are significant differences in how succeeding generations

earned-wealth donors. The chief difference is that the inheritor is often more likely to be conservative in the scale of giving, consciously or unconsciously believing that the money cannot be earned again. On the plus side, the inheritor has often grown up in a culture of giving, and is therefore more comfortable and experienced with it. There is also a different relationship to the wealth. The inheritor may feel less ownership. He or she must live with “the family story” and legacy, which are sometimes positive, sometimes negative, and usually a mix of both. The wealth dynamic produces a range of personal challenges, all of which dramatically affect philanthropic action or inaction.

- **Age and Giving Experience** -- Participation in giving and increased levels of giving are typically associated with donors who have reached their fifties, after they have made big purchases in their lives, achieved financial success, and are thinking ahead to legacy. Increased wealth among the young may challenge this paradigm. Beyond the numbers, it is believed that younger donors behave differently than older donors as a result of being at a different stage of life - deep into work and family life, defining and achieving success rewarded for brash, new ideas. One experienced fundraiser observed that younger donors are more arrogant, that control is more of an issue, and that they are apt to “jump in and get it wrong.” The middle-aged donor may be more inclined to give the donee the benefit of the doubt, yet still push for accountability and ask good questions based on experience. The older donor, according to this fundraiser, understands and wants to bring about real, long-term change. He says that there is a maturity curve to the donor, which is often age-related.

Regardless of age, new wealth or old wealth, the generation of “we” or “me”, the synagogue executive director must be positioned to educate potential donors and promote self-discovery. I discovered that as a synagogue executive director I did not use words like *tzedakah*. Rather, I was more likely to sell philanthropy using phrases like “the ability to make change” or “create and maintain Jewish educational and spiritual programming.”

Not surprisingly, many young entrepreneurs have told me that their interactions with the synagogue have left them frustrated. They have said that synagogues are poor managers of resources; they are not clear on the synagogue’s missions and goals, believing that the synagogue does not develop coherent strategies that will maximize results. Donors wish to give to religious institutions that:

- Can demonstrate results through evaluations;
- Maximize the share of funds going to program rather than administration;
- Offer specific goals and clear strategies to achieve them; and
- Can find productive roles for donors seeking involvement, particularly those who use their business skills.<sup>7</sup>

An important example of what synagogue leadership should be can be learned from the corporate world. The Putnam Senior Executive Foundation, established in 1999 by wealthy Putnam senior executives, found that it was difficult to give away a million dollars responsibly.<sup>8</sup> They decided to give smaller gifts, so as not to overwhelm the majority of mid-size to small non-profit organizations. In selecting grant recipients, Putnam chose those with strong management teams and strong boards.

---

*... as a synagogue executive director I did  
not use words like tzedakah... I was more likely  
to sell philanthropy using phrases like  
“the ability to make change” ...*

---

When soliciting, our *balebatim* need to realize, as our golden rule says, that it takes money to make money. We know that solicitors who are themselves givers are the most effective solicitors. However, when it comes to fundraising there are no rules. It is instinct, people skills, insight, and sensitivity that count. Sounds like a perfect job for your Rabbi. Your Rabbi plays an important role in fundraising. You and the Rabbi should be partners in this management team. And your synagogue board and officers must also share in the responsibility of raising funds.<sup>9</sup>

An exciting new development in philanthropic giving is the rise of the “giving circle.” What a great idea! Formal or informal groups meet to discuss and collaborate on the non-profit’s needs. Although I have not found any studies yet published, it is evident that donors need another form of support or education, that of their peers. The importance of peer support is all around us but it currently takes place in private, among friends. Can you imagine if every shul had one or two giving circle *havurot*?



Finally, there are few shuls that spend the money and energy they should on grant writing. Currently there are 160,000 foundations in America. And as for the actual grant writing effort - instead of all the verbiage, how about a video on a DVD? What an effective way to make your points! A video is a wonderful tool for those potential donors who don't want to sit through a lecture or presentation, but are open to hearing your story.

### Sources of information

It is estimated that nearly 70% of all households in America give to religious organizations. Your synagogue software should be able to tell you what funds each member favors. Who are your biggest givers? Who doesn't give and why? This information is valuable and you will need it in your future solicitations.

In identifying those who could make philanthropic gifts, I have learned that schmoozing with accountants, finan-

cial planners, and attorneys about members can produce incredibly valuable information in guiding us to prospective givers who are "sleepers" - men and women who don't wear their wealth on their shirt sleeves. Perhaps a member who is worth a lot of money has a professional helping them with some advice or information on bequest opportunities. Many times the professionals believe, more so than the donor, that the synagogue is a wonderful, inspiring, spiritual place that deserves all the help it can get. Obviously they can help influence the potential donor to participate.

The key is information. I have tried to create a database with the following information, which Elizabeth S. Sunde in her article "Fundraising Goes Electronic" and others have outlined so well:

- A full profile of each of major donors with gifts above \$1,000, including any personal information about them such as their hobbies, children's names, education levels, occupations, etc.
- The status of all foundation grant-related activity including which staff is responsible for which activities.
- Predictions of how much money will be collected by the end of the year based on outstanding pledges and grant proposals.
- A list of the top ten donors who gave to the Annual Campaign last year.

This is all critical information that should be at your fingertips. Armed with this information your challenge is to adapt the best of what you know and have the strength and conviction to explore new ground, try new approaches and create new models.

### Fundraising in Cyberspace

How about fundraising electronically? I read in the International Herald Tribune<sup>10</sup> that a church in Madrid, Spain had successfully found a technology company to develop for them an ATM which has been modified to do the following: Any person of any faith, parishioner or not, could walk into the lobby of this very impressive cathedral. He/she takes out their VISA(tm) card; inserts it into the ATM; makes a donation of alms; and the ATM spits out a receipt for tax purposes. Could we have them in our synagogues (turned off on Shabbat, of course)?

In the July 7, 2004 issue of the Chronicle of Philanthropy,<sup>11</sup> the Jewish National Fund was rated the #1 environmental organization in the area of online fundraising, as well as #1 of all Jewish non-profits. How much worldwide you ask? The answer is \$1.3 million, an increase of 13% over 2003. Simply put, websites are good for education and perhaps pledges. To quote JNF President, Ronald Lander, "It is clear that electronic fundraising is the future..."





By applying e-commerce technology, JNF is ahead of most non-profits, and has the potential to save its donors hundreds of thousands of dollars in administrative costs.

The article goes on to say that JNF is using a combination of e-philanthropy techniques, including localized e-mails and a sophisticated on-line store. Tracking features enable JNF to see how many e-mail newsletters are opened, how much and from whom the many donations came as a result of the e-mail, and which links in the e-mails are the most popular with recipients. JNF e-newsletters are opened at a rate of 34 percent, significantly higher than the industry standard.

Not surprisingly, Congregation Shir Hadash in Los Gatos, California, has taken the scrip fundraiser to a new level. In association with amazon.com, ebay, e-scrip, and school pop, with online merchants including Barnes & Noble, Eddie Bauer, Dell Computers and many more, Shir Hadash gets a rebate, not *tzedakah*, for every purchase you make. I say this is magnificent! For more information go to [www.ShirHadash.org/escrip](http://www.ShirHadash.org/escrip).

Fundraising in cyberspace is still in its fledgling stage. Yet its potential is beyond visionary. What about synagogue virtual venues? Members and nonmembers can sit at home, link in to the synagogue website, enjoy the concert, lecture or program and donate or pledge funds. Another idea is cooking on the net.<sup>12</sup> Famous chefs in your area donate time and recipes. For \$18 the customer receives one recipe from each chef. The Grantsmanship Center Magazine<sup>13</sup> is an excellent source for all kinds of ideas relating to fundraising in cyberspace. I believe that websites, properly designed as portals for giving, empower donors to make charitable decisions that fit with their personal interests and commitments.

In conclusion, as executive directors of synagogues, you must thrust yourselves into the field of philanthropy. Not doing so limits your own professional growth and success, as well as the growth of your synagogue. The past 20 years have brought about a democratization of philanthropy. No longer the province of a handful of the older generation, now all members are potential donors. If there is a new giving adage, it may be that synagogues will have to prove to donors that they are as effective in reaching their goals as they are at raising funds.

Lastly, for everyone there is a common and important challenge: philanthropic education. For the donors it is understanding the opportunities for investing in the future of their shul. For the executive director, it is to adopt what is best known and to have the conviction to explore

new ground, try new approaches, and create new models. This is no small job, but by educating ourselves about new models, new tools, new ideas, and new approaches, we can achieve what every synagogue seeks: sustaining momentum and generating high impact.

I want to thank NAASE for this opportunity, Irma Lee of blessed memory, and the Past Presidents of Beth Shalom. I would also like to thank my loving wife, Sylvia, my wonderful daughter Danit, who has been a trustworthy secretary in preparation for this convention, my best friend Barry Palkovitz, and my best director friend, Glenn Easton. Glenn and I have an unbreakable bond, Irma Lee Ettinger. ■

---

*Amir Pilch, FSA, is Executive Director Emeritus of Congregation Beth Shalom in Pittsburgh, PA, and a past president of NAASE.*

#### NOTES:

- 1 "Synagogue Budgets: A Comparative Look at Revenue & Expenses," by Luis Dorfman, Harry Hauser, Gabriel Miller, and Glenn S. Easton, FSA, ATZ, NAASE Journal, Fall 2004.
- 2 Ibid.
- 3 "From Challenge To Opportunity; To Build Inspired Communities," by John S. Ruskay, Journal of Jewish Communal Service, Vol. 77, No. 2 Winter, 2000
- 4 "One Experts Opinion: Peter Frumkin on the New Philanthropy," Hauser Center for Non Profit Organizations, Kennedy School of Government, Harvard University, August 15, 2000.
- 5 "Working with Today's New Donors - Lessons from Research and Practice" by Shirley Sagawa, Annie E. Casey Foundation, September 2001
- 6 Ibid.
- 7 Ibid.
- 8 "New Models of Philanthropy," Initiatives: A Newsletter on Strategic Philanthropy, The Philanthropic Initiative, Inc., Spring 2000, Volume 6, Number 1.
- 9 It is important that you have some practical fundraising ideas. Synagogue calendars, books of remembrance, directories, auctions, scrip programs, and president's circles are all-important and bring in needed dollars. But few, except maybe the president's or Rabbi's circle (a group who make larger, unrestricted donations over a certain amount), bring in large dollar amounts. Here are some ideas: One of my favorites is the concept of Honorary President. Have one, two, or three at maximum honorary presidents. This honorary president's title is bestowed upon members of unique and outstanding giving of any combination of time, talent, and of course, treasures. In the mid-eighties for a \$100,000 gift we bestowed the title of Honorary President. Sometimes, it is a person who is not well endowed, but who simply deserves the honor. You may find a bequest at the end of the line. We allowed honorary presidents to sit on our executive committee without a vote, and on the board of trustees for life, with a vote. There are synagogues that have used honorary vice president, secretary, and treasurer etc. titles with great success. Even without a vote in the synagogue governance structure, these individuals have great political clout and can be of great support in achieving new goals and change. A similar idea is the use of honorary co-chairs when sponsoring any kind of shul event. They are not substitutes for the committee organizing this special event, but lend an additional level of kavod and dignity to the event.
- 10 International Herald Tribune, December 2, 1999
- 11 Chronicle of Philanthropy, July 7, 2004
- 12 "Fundraising in Cyberspace," by Marc Greenstein; The Grantsmanship Center, Fall 1995
- 13 The Grantsmanship Center, PO Box 17220 Los Angeles, CA 90017, (213) 482-9860, [www.tgci.com](http://www.tgci.com)

# Establishing Visual Identity Guidelines for Your Congregation

Robert D. Festenstein



## Introduction

In today's image conscious society, non-profit organizations increasingly are following the lead of the for-profit world by creating an organizational brand, or visual identity guidelines. Companies such as Proctor and Gamble produce volumes of standards for each of their hundreds of consumer products. United Parcel Service takes its visual identity so seriously that it has gone so far as to copyright the particular shade of brown used in aspects of its communications and operations.

Non-profits as diverse as Clemson University, the United Way, and United Jewish Communities all have implemented some form of these guidelines to maintain their image in a way that is consistent with their mission. Many organizations issue or provide specifications or devote pages of their website to defining how their logos, corporate seals, or official colors look or are to be

reproduced. The City of Winnipeg, Manitoba (Canada) has an explicit fifteen-page manual on visual identity that regulates how the municipality's corporate signature is to be used.

A synagogue is also a non-profit organization that provides goods and services. There is no reason why any congregation, regardless of size and resources, should not implement some level of visual identity guidelines to project a positive and unified image.

## Why Establish Visual Identity Guidelines?

A lack of visual identity guidelines can lead synagogues into situations where they will find that they are not presented in a consistent and professional manner. The congregations will have no continuity in their communications and can as a result appear sloppy and disorganized.

Examples of this are found even in the name of a congregation and how it used both in formal and informal capacities. Is the proper usage "Congregation Beth Shalom," "CBS," or "Congregation Beth Shalom of Hamilton County?" By working through the process of establishing visual identity guidelines customized to a particular congregation, this will be a concern no more.

**Which of the following fonts looks more professional and dignified?**

- 1- K.K. Adath Israel Congregation
- 2- K.K. Adath Israel Congregation
- 3- **K.K. Adath Israel Congregation**

Obviously the second, which uses the more business like font of Garamond, as opposed to the first, which uses the more sophomoric font, Comic Sans, and the third which uses the totally inappropriate font, Planetary Orbiter.

Other congregations and organizations use what is called a "tagline" with their name and/or logo. The "tagline" is used in such a way that the expression is considered to be synonymous with that of the organization. Some recent examples of "taglines" include:

**The United Negro College Fund:**  
*A Mind is a Terrible Thing to Waste*

**UPS:**  
*What Can Brown Do For You?*

In addition to a name and "tagline", a congregation's brand is most noticeable in the development, implementation, and usage of its logo. Use of a logo should not be at the discretion of individual employees or outside suppliers. The congregation's logo should reflect the mission and values as well as the other factors that make up its individualized branding. Many congregations reproduce their logo frequently, or distribute it to others as a downloadable computer file, without any guidelines as to how it should be used.

The following are three reproductions of the logo for Adath Israel Congregation in Cincinnati, Ohio, embedded in this article from a downloadable file. This first reproduction is how the logo is supposed to look:



Because of the flexibility of today's computers, virtually anyone can download a synagogue's logo and manipulate it

for use. This is no longer in the realm of sophisticated printing and graphics. What follows are two very common manipulations of the logo shown above. The result is a distorted visual look to the congregation's visual identity. In both examples, the logo is not displayed in accordance with the congregation's standards. Note that in the first example, the logo is stretched in height in a disproportionate manner.



In the second example, the logo is stretched in width in a disproportionate manner:



### **What Should Be the Objectives of Visual Identity Guidelines?**

Establishing a set of guidelines will provide consistent coordination of visual communications for the congregation. Establishing and distributing guidelines to employees, congregants, and vendors will help to effectively build maximum recognition and awareness of the congregational "brand" both within the congregation and in the greater community.

Successful accomplishment of these objectives should seemingly be a harbinger for the following:

- Communications will present the congregation in a professional and consistent matter.
- The logo will be used consistently in accordance with approved policies and standards.
- There now will be continuity in congregational communications.



- The organization will be perceived as being organized, professional, welcoming, and exciting.

The results will, of course, not be instantaneous, but will be noticeable over time. Lay leadership and other stakeholders should be made aware of this reality at the outset. How to actually establish guidelines for your congregation is something that needs to be done on a case-by-case basis. There is no one method that is right for all congregations. However, the scope of the guidelines should include, but not be limited to:

- Newsletters
- Weekly service programs
- Major events
- Interior/exterior signage
- Flyers and announcements from various committees and affinity groups
- Web site
- E-mail treatments
- An official font, or family of fonts
- An official color, or family of colors
- Logo standards

### **Things to Consider When Developing and Implementing Guidelines**

This is a process that involves change. When change is happening in any major proportion within a congregation, the congregation will not regret putting together a change management plan. An example of this process that might be more familiar would be the development of a rabbinic transition committee when the congregation has secured the services of a new spiritual leader.

Some of the basic guidelines that should be established are:

- Staff and lay leadership should make no unilateral decisions.
- No cost should be incurred that is outside of the established budget without proper authorization.
- There should be no deviation from the scope of the project without proper authorization.
- Proper documentation should be kept of all change orders.
- All changes should be subject to a thirty-day review.

### **Communications/Accountability**

The unveiling of guidelines is no less significant than would be the announcement of not renewing a beloved employee's employment contract and/or announcing to the congregation that the board has made the decision to build a new facility. There needs to be regular, concise, and clear communication to the membership, lay leadership, and staff, otherwise the guidelines will be doomed to fail. Some actions that may mitigate risk in such an instance are:

- Be open and honest when the project gets underway; explain the rationale for taking on a project that will seemingly change the way in which many associate themselves with the congregation. Aside from a direct mail piece, devoting the front page of the congregation newsletter to the project would speak well to the magnitude and importance of what is about to be undertaken.
- Set up focus groups of the stakeholders to probe for reactions and interest.
- When final guidelines are established and ratified, unveil them in a big way.

### **Summary**

Establishment of a set of visual identity guidelines will bring a huge return on investment to the individual congregation. The strength of a congregation's identity consistently depicted in print and other forms will go a long way toward attracting and retaining members, and help the congregation establish itself in the community using a clear and consistent message, however subtle that message might be. ■

---

*Rob Festenstein is the Administrator of Adath Israel Congregation in Cincinnati, Ohio and currently serves as a member of the NAASE Board of Governors and Moderator for the NAASE Listserv: EXECNET.*

# The Executive Director as an Instrument of Holiness

Marc M. Neiwirth, FSA, ATz

11

## Introduction

Each of us became a synagogue executive for a reason. We may not even know deep down inside what that reason was. Furthermore, the reason we became synagogue executives may not necessarily be the reason why we are still synagogue executives today. This question goes to the very heart of why we do what we do. However, equally important is how we do what we do. The purpose of this paper is to explore the concept of holiness as it applies to us first as Jews, and then as executive directors, and finally, to suggest ways that we can infuse holiness into our professional lives not only for ourselves, but for the potential influence that we may have on others.

## What is holiness?

**"You shall be holy, because I, the Lord, your God, am holy." (Leviticus 19:2)**

**"And you shall be unto me a kingdom of priests and a holy nation...." (Exodus 19:6)**

These verses are the essence of God's commandments to the Children of Israel regarding holiness. We are all created in the image of God. Therefore, the purpose of our lives is to refine that image of God within each of us. Other religions only demand holiness from their leaders. Judaism requires holiness from everyone. The Hebrew root *kadosh* means to be separate; and, interestingly enough, that separateness does not necessarily refer to a higher level of moral behavior, although that is what it normally connotes. It also does not only refer to people. Holiness is dictated by the context and circumstances of the act, namely time, place and purpose. For example: Time- Shabbat is a holy time for Jews. It is ushered in with the *kiddush*, a prayer proclaiming the holiness of the day, and said over a cup of wine. When used improperly, wine can result in drunkenness and extremely inappropriate and self-destructive behavior. However, when used for *kiddush*, it elevates the use of wine to something holy. Place- the holiest place for Jews was the Holy Temple in Jerusalem and the Holy of Holies (*kodesh hakodashim*). It was the place where animal sacrifices were brought to God. As the place that was set-aside specifically for this purpose, these offerings of sacrifices could not be performed anywhere else. Purpose- when a man and a woman marry, the term used is *kiddushin*, the root of which is *kadosh*. On the completely opposite end of religious behavior, but from the same Hebrew root ("k-d-sh") is the word *kedaysha* - a prostitute. Sex with one's

spouse is holy. Sex with a stranger for money is unholy. Other uses of the root word that are more commonly known and used are *kaddish*, and *kedusha*. *Kaddish* is an Aramaic prayer that proclaims the holiness of God's great name, and ostensibly serves to separate various sections of the service, each with its own holiness. *Kedusha* is actually an abbreviation of the term *kedushat hashem*, which literally means the holiness of God's name. It is the third *beracha* of the *amidah*, one small line when said privately, and expanded when said in a minyan.



Marc M. Neiwirth

If holiness means a type of separateness, then what is the opposite of holy? When one asks this question, the answer that comes to mind most immediately is "profane." When we think of profane, we think of abuse, degradation, coarseness, vulgarity, contempt and irreverence. However, in Judaism, the opposite of holy is actually "ordinary." We have already established that Hebrew root of *kadosh* means separate, either for good or for bad. Therefore, what is left is the "unseparate" – the ordinary.

## How do we achieve holiness?

In Judaism, the purpose of human existence is to achieve holiness through acts that refine our character. This refinement, or purification, as the *midrash* that follows states, is achieved through the observance of *mitzvot*. It is stated in *Bereshit Rabbah*, a midrashic commentary on the book of *Bereshit* (44:1): "Rav said, 'the commandments were given to Israel only in order that people should be purified through them. For what can it matter to God whether a beast is slain at the throat or at the neck?'" This purification and refinement of character achieved through the observance of *mitzvot* not only augments our relationship with God, but it equally enhances our relationship with our fellow human beings.

There is a tendency in Judaism to divide *mitzvot* into two categories, namely "ritual" and "ethical." However, that division is artificial. The Torah makes no such distinction between these two types of *mitzvot*. Keeping the Shabbat and not cheating another person are both *mitzvot*. We may make our own value judgments about which are more important, but the Torah does not. They are both *mitzvot*. They are both to be observed.

It is most interesting to note that many of the *mitzvot*

mentioned in Leviticus, Chapter 19 pertain to how we treat each other as human beings. Lest we think that the path to holiness depends on how scrupulously we worship God, both through prayer and observance, the Torah reminds us that the true path to holiness is how we treat each other. In other religious traditions, the path towards holiness is directed to select individuals and is achieved by removing oneself from society as much as possible; people are deemed to be sinful, and staying away from them is seen as the only way to achieve holiness. Not so in Judaism. Holiness is something that everyone can strive to achieve. How we achieve holiness is manifest in how we treat those with whom we come into contact. The blueprint is right there for us in Leviticus, Chapter 19.

### **Implications for the Synagogue Executive Director**

Leviticus, Chapter 19 is so deep in its “blueprint for holiness” that there are currently courses that spend an entire semester just dealing with this one chapter of the Torah. However, for our purposes, I would like to focus on just two verses and how they pertain to us as executive directors.

**“You shall not cheat your fellow and you shall not rob; a worker’s wage shall not remain with you overnight until morning.” (Leviticus 19:13)**

This verse discusses two concepts: how we deal with worker’s wages and cheating. Regarding workers wages, “You shall not cheat your fellow and you shall not rob...” Rambam, in *Sefer Hamitzvot*, interprets this verse to mean that cheating and robbing in this context refers to deceitfully or forcibly withholding anything that belongs to another person, such as an article that was left for safekeeping. This also touches upon the

mitzvah of returning a lost article to its rightful owner. We all have a “lost and found” area in our synagogue, and we all know its purpose. How many of us, however, are aware that returning a lost item to its rightful owner isn’t just a “nice thing to do” (although it is), it is a mitzvah, and by doing so enhances our respective institutions’ holiness?

**“... a worker’s wage shall not remain with you overnight until morning.”**

We who work in synagogues are in the most non-profit of the non-profit sector. We are dealing with community/ public funds and need to be judicious about how we spend the very limited financial resources that we have. Very often Jewish institutions are notorious for paying their staff, especially maintenance and support staff, far below the going rate for similar positions. Doing so not only deprives us of better workers who can help us better serve our congregants, it is not in keeping with the spirit of the mitzvah. While we may not necessarily be able to compensate employees at the high end of the pay scales, we should not be at the low end, either.

We need to be mindful of the verse above, namely that it is a mitzvah to pay our staff (and reimburse them for out-of-pocket expenses) on time and accurately. While calculation mistakes are bound to happen from time to time, we should never say to an employee, “I’ll correct it on your next paycheck.” That is in violation of the commandment in verse 13. It should be corrected immediately, regardless of the inconvenience to our bookkeeping personnel. Likewise, institutions have been known to delay payroll, albeit rarely, when the institution is in financial crisis. While we hope that none of our synagogues are ever in such a situation, we need to be mindful of the fact that delaying payroll, regardless of the reason, is also a violation of this commandment. We all know that paying people decent wages, on time, is the right thing to do. We now also know that it is a mitzvah, and its observance enhances our synagogues’ holiness as well as our own.

**“You shall not insult the deaf, or place a stumbling block before the blind. You shall fear your God: I am the Lord.” (Leviticus 19:14)**

There are at least two reasons why we are told by God not to insult the deaf or put a stumbling block before the blind. The first one, which is commented on by Ibn Ezra, is because we are more than capable of not doing it. We are able to do these things without the affected parties ever knowing that we did it. It is a very easy thing to do. If we are careless and actually do this, it is akin to





a very “cheap shot” at someone who is disadvantaged. Rashi’s and the Rambam’s commentaries on this verse go a bit further. We learn from this verse that if we are not supposed to insult someone who cannot hear us, thereby never knowing that we did it, we are certainly not permitted to insult someone who can hear us.

The second part of the verse, not placing a stumbling block before the blind, is open to much broader interpretation. We discussed in the last paragraph its simple meaning. Rabbi Samson Raphael Hirsch comments that the term “blind” does not just refer to someone who is physically blind, but someone who is intellectually deficient, or someone who does not have the appropriate level of knowledge to make a decision. In Rambam’s *Sefer Hamitzvot*, he states that it is forbidden to cause someone to sin. Several examples in our own synagogues come to mind. We all know that people have varying levels of *kashrut* observance in their homes. What one person considers kosher may not satisfy another’s definition. However, when it comes to our synagogues, we tend to maintain the highest level of *kashrut* possible in order that everyone would feel comfortable and nobody would feel that they were caused to violate *halacha*. Regarding computer operations, leaving computers on or allowing access to the network on Shabbat or Yom Tov, could very easily tempt people to use them. Likewise, something as simple as leaving pens and pencils on desks on Shabbat and Yom Tov also provide that level of temptation.

There are other examples as well. The *Sifra* states that this law is violated by giving someone bad advice. The Talmud states that this law is also violated by providing someone with the means to commit a sin, when you know that the person cannot resist the temptation (*Pesachim 22b*). This last concept is further elaborated upon in a citation from the Talmud (*Baba Metzia 75b*): “Said Rabbi Judah in the name of Rav: Whoever has money and lends it without witnesses violates the prohibition of ‘You shall not put a stumbling block before the blind.’”

I would like to expand and, with all due respect to the Talmud, write an additional version of this quote. My version would read: “Whoever collects money without witnesses violates the prohibition of ‘You shall not put a stumbling block before the blind.’” What I am referring to here is proper internal financial controls. We always talk about the need for proper controls. We have read all too often of situations where some of our former colleagues, as well as officers and others in positions of trust in our synagogues, have stolen from their congregations. Therefore, by instituting proper internal

controls, we are not only preventing theft, we are truly removing those stumbling blocks that would cause people to do terrible things in moments of weakness. When we think of doing these things not only because it is the “right thing to do” but because it is a mitzvah, then these actions enhance our synagogues’ holiness as well as our own. Once again, it is the circumstances that surround the act that make it either ordinary or holy.

### Infusing holiness in our jobs

What can each of us do to infuse a bit more holiness into our jobs in our synagogues on a daily basis? Here are a few suggestions:

- **Study:** Most of us have weekly staff meetings. If we could expand them by ½ hour and have Torah study during that time, it would help us refocus on why we do what we do. If we are not able to do it as a staff, then I would encourage each of us to do it by ourselves, even for 5 or 10 minutes a day. I know that it is very difficult to do this, as all of the senior staff members in our synagogues are very busy. But the example that this would set for our synagogues could be very powerful. We cannot inculcate in our synagogue members the value of Torah study if we ourselves do not do it.
- **Prayer:** We truly need to be visible Jewish role models for our congregants. In order to do that, we need to make prayer part of our lives. If we pray at the synagogue where we work (and I have always strongly felt that we should), we should be in shul davening. Many of my colleagues say that when they are in shul on Shabbat or Yom Tov they are constantly pulled out of services for one thing or another, especially on the High Holidays. I have always been able to sit in shul and daven, not only on Shabbat and Yom Tov, but even on the High Holidays. My support staff knows that I am available if the need arises, but my instructions are clear, “Get me if you need me, but it had better be something that you can’t handle yourself.” There have indeed been times when situations have arisen that definitely required my attention. But, my people have always known that I take *tefillah* seriously, and it has always been respected.
- **Home Life:** The home is frequently referred to as a “*mikdash me’at*” - a miniature sanctuary. How often do we, who work so many hours for our synagogues, neglect our own families? We need to establish boundaries. While we expect our families to understand the time demands of our jobs, we likewise need to make sure that our synagogues and their leadership respect our need to be with our families.

The holiness that has been addressed in this paper applies to our synagogues, our jobs and to our daily lives with our families.

### **Towards Becoming *Klei Kodesh***

**"You shall be unto me a kingdom of priests and a holy nation." (Exodus 19:6)**

The term "*klei kodesh*" literally means "holy vessels." The term originally referred to the implements the *kohanim* (priests) used in the Tabernacle and later the Holy Temple. In later times, it became a term used for clergy, rabbis and cantors. More recently, however, that term has been expanded, rightly so, to include all Jewish professionals. But, how many of us really feel like "*klei kodesh*"? How does overseeing maintenance make any of us feel like "*klei kodesh*?"

Six years ago, a Mormon Temple was built in Columbus, Ohio. Admittance to Mormon Temples is restricted to card-carrying Mormons (and, yes, they do have identification cards). The only time non-Mormons are permitted in a Mormon Temple is before it is consecrated. So, just before this temple was consecrated, it was open to the public. I convinced my synagogue's rabbi to go for a ride with me, and we went to see this new building.

As we toured this magnificent building, which is used for life-cycle events and not for weekly worship, we were struck by the fact that the building was as clean as a surgical suite. When we left, we passed by the information table, and, ever the Executive Director, I asked the person at the table, "If only card-carrying Mormons can enter the Temple, who cleans it?"

The answer was fascinating. I was told that Mormons clean the building and consider it a great honor and the highest of callings to clean their temple. Part of me held in a laugh until we got back in the car, as I said to my rabbi, "Can you imagine my calling a member family and telling them that it's their turn to clean the bathroom next Thursday?" However, another part of me was jealous, because in their own way, they truly understood what being "*klei kodesh*" was all about.

We often hear discussions about whether or not the synagogue is a business, in the traditional sense of the word. For-profit business entities exist to provide a product or service and to make money for their owners. Synagogues are different. Synagogues exist to enhance Jewish community. We may need to run our synagogues in a business-like manner and be responsible stewards of the funds our congregants give us, but we must never

lose sight of the fact that our synagogues are institutions of holiness. We, as the professionals entrusted to care for and manage the synagogue, must do our part to ensure that they continue to be *battei mikdash* – houses of holiness.

In an article in the September 2001 issue of *Sh'ma*, Rabbi Harold Schulweis stated that modeling our synagogues after corporations has been detrimental to their character and aspirations. He also pointed out that those who have tied their vocation to the synagogue are all "*klei kodesh*," instruments of holiness.

Each of us is somewhere on the ladder of religious observance and commitment. Some of us may feel that we are not as personally observant as we think we should be, and come to the conclusion that we do not merit calling ourselves "*klei kodesh*". I would disagree with that viewpoint. If we perceive ourselves as "*klei kodesh*," and work to carry ourselves as part of that team, then our synagogue members, leadership and staff will also perceive us that way. Striving toward climbing that ladder of holiness helps us to attain the end result.

We are indeed more than just administrators or executive directors. We help facilitate the daily, weekly, monthly and yearly routines that are the essence of synagogue life. If we begin to see that as holy work, then we will become instruments of holiness, helping our institutions realize their full potential. ■

---

*Marc M. Neiwirth is the Executive Director of Congregation Tifereth Israel in Columbus, Ohio. A member of NAASE's Board of Governors, he is chairperson of the 2006 Annual Conference, and he is NAASE's newest Amin Tzibur (ATz), having received his commission in June 2005.*

#### SOURCES:

Amsel, Rabbi Nahum. *The Jewish Encyclopedia of Moral and Ethical Issues*. Northvale, New Jersey: Jason Aaronson, Inc., 1994.

Ariel, David S. *What Do Jews Believe?* New York: Schocken Books, 1995.

JPS Hebrew-English Tanakh. Philadelphia: The Jewish Publication Society, 1999.

Leibowitz, Nechama. *Studies in the Weekly Sidra*, 5717. Jerusalem: The Jewish Agency, 1957.

Lieber, David L. *Etz Hayim: Torah and Commentary*. New York: The Rabbinical Assembly, 2001.

Plaut, W. Gunther. *The Torah- A Modern Commentary*. New York: UAH Press, 1981.

Scherman, Rabbi Nosson. *The Stone Edition of the Chumash*. New York: Mesorah Publications, 1993.

Schulweis, Rabbi Harold. *In Search of Klei Kodesh*. *Sh'ma*. September, 2001.

Twerski, Rabbi Abraham, MD. *Living Each Week*. New York: Mesorah Publications, 1992.

# Teshuvot by the Committee on Jewish Law and Standards that Affect Synagogue Management

## What Does the Executive Director Need to Know?

15

Rabbi Joel Roth Responds (Introduction by David I. Rothenberg, FSA, ATz)

On the surface, it may seem that understanding practical applications of Jewish law and customs in the daily life of the synagogue is not necessary to be an effective executive director. After all, the congregation's rabbi is ultimately the *mara d'atra* of the congregation, and, as a result, is the authority in matters of Jewish religious practice for his / her synagogue.

However, the executive director often is required to make judgmental decisions and interpretations without the rabbi being present, within a well – defined scope of alternatives that do not create or re-interpret *halacha*. The executive director is often approached by congregants or vendors who, for whatever reason, are not able to consult with the rabbi. In such cases the executive director must base on his/her decision on knowledge of the congregational rabbi's previous decisions, or rely on his/her own knowledge of Judaism. It is not uncommon for congregants, non-Jewish visitors, or vendors, not familiar with the nuances of Jewish practice, to then ask why the decision or practice is what it is. And it is not unusual for the executive director to be confronted by situations involving the practical application of Conservative Jewish law and practice in the following areas, to name a few:

- Shabbat observance
- *Kashrut*
- Bar / Bat Mitzvah
- Fundraising
- Questions of personal status (intermarrieds) with respect to participation in synagogue life
- Mourning practices.

Or – the executive director might be attending a meeting of some committee under his/her scope of responsibilities, normally not attended to by the rabbi, such as the house/building committee, cemetery committee, membership committee, or fundraising committee. A discussion could ensue about a topic for which there might be relevant responsa, and it might be prudent for the executive director to be aware of this and bring this to the attention of both the committee and the rabbi. Examples: how to properly display a *pasul* Torah in a display case (1997), issuing interest-bearing bonds to raise funds (1988), or putting a congratulatory notice for an intermarriage in the congregation's bulletin (1989).

The executive director of the modern Conservative synagogue, as part of his/her responsibilities of continued professional education and development, may want to be well-versed in current developments and concerns in Conservative Jewish practice and, at a minimum, to recognize when he/she, or the lay leadership, has entered

---

*...the executive director often is required  
to make judgemental decisions and  
interpretations without the rabbi being present,  
within a well – defined scope of alternatives  
that do not create or re-interpret halacha.*

---

areas of concern so that they can turn to the rabbi as *mara d'atra*, and at best, be able to articulate or explain Jewish practice — or the synagogue's position on a question of practice — in response to casual questioning by the laity or others in relevant situations.

It is only in the last few decades that much of what could be considered as Conservative Jewish religious practice has been codified in volumes that are accessible and readable in English for the knowledgeable lay reader. [A Guide to Jewish Religious Practice](#), by Rabbi Isaac Klein (zt"l), published by the Jewish Theological Seminary in 1979 and available through the USCJ book service, was one of the first such volumes to neatly arrange and present the canon of what was at *that* time considered normative Conservative practice, in a logical, organized format. Rabbi Klein synthesized traditional Biblical, Talmudic, and post-Talmudic sources, as well as records of the Rabbinical Assembly, with his own teaching outlines used at the Jewish Theological Seminary.

In the years since the publication of [A Guide to Jewish Religious Practice](#), the Committee on Jewish Law and Standards of the Conservative Movement (CJLS) has had to look at questions covering a broad range of concerns that Rabbi Klein and his contemporaries in the Rabbinate



could probably not have imagined. Numerous responsa and position papers have been accepted on a wide range of questions and concerns that have been of contemporary importance to Conservative Jews, thereby expanding, clarifying, or updating the length and breadth of what can be considered Conservative Jewish practice.

However, instead of trying to update Rabbi Klein's magnum opus, or to add the decisions of the past 25 years into his format, the CJLS and the Rabbinical Assembly have instead published the complete and unedited papers, responsa, and *teshuvot* it has accepted, without supplying commentary or interpretation, in two volumes, RESPONSA 1980 – 1990, and RESPONSA 1991 – 2000. In addition, the texts of these papers are accessible on the Rabbinical Assembly website, [www.rabbinicalassembly.org](http://www.rabbinicalassembly.org). In doing so, the editors have formatted contemporary *halachic* content into the traditional talmudic format of *she-eilot* accompanied by *teshuvot*, of questions posed to the contemporary Conservative Rabbinate followed by well-researched answers. In many cases multiple answers are presented in the form of papers with alternative positions that were accepted by the CJLS as valid positions based on sound reasoning in the context of the *halachic* framework. (It is important to note, as is explained in the introduction to

these volumes, that to accept a paper requires only 25% of the CJLS to vote in favor of acceptance of the paper as expressing an acceptable opinion arrived at through use of traditional *halachic* sources and reasoning). This, in and of itself, does not make the proposed answer officially endorsed practice. Further, papers can then be submitted that offer dissenting opinions, which are then adapted as part of the "official" dialogue.

Thus, the casual reader of these volumes will often find papers that were "accepted" that offer several different, and possibly opposing, answers to the same question. Again, we come back to the fact that the purpose of these volumes is to give the Law Committee an official way to provide *halachic* guidance to the Conservative Rabbinate and their congregations. We, the non-Rabbinic professionals responsible for synagogue management, through these volumes, are given unique insight into the detailed assumptions that form the basis for contemporary practice in the 21<sup>st</sup> century synagogue.

For the last fifteen years, during NAASE's Week of Study at JTS, executive directors have had the honor and privilege of studying with many of the rabbis who wrote the responsa in these volumes. In June 2005, during the Week of Study, we asked Rabbi Joel Roth, Professor



of Talmud and Jewish Law at the Jewish Theological Seminary, a member of the CJLS, a great friend of NAASE, and frequently our scholar-in-residence at the annual NAASE Week of Study, to suggest a list of responsa from these volumes that should be of interest to the executive director who has the desire to be more familiar with recent decisions of the CJLS that affect the management and administration of the synagogue.

**Rabbi Joel Roth:**

*I suggest the following from the 1980 – 1990 volume of responsa:*

1. Use of Synagogues by Christian Groups - Elliot N. Dorff p. 165
2. Fixing a Bar Mitzvah Date Before the Birthday - David H. Lincoln p. 185
3. Preparing and Serving Food on Shabbat in the Synagogue - Kassel Abelson p. 197
4. Preparation and Serving of Food on Shabbat in the Synagogue - Mayer Rabinowitz p. 200
5. Videotaping Responsa
  - Videotaping on Shabbat - David H. Lincoln p. 212
  - An Addendum to 'Videotaping on Shabbat' - Mayer Rabinowitz p. 215
  - Tape Recording and Photography on Shabbat - Mayer Rabinowitz and Dvora Weisberg p. 218
  - The Use of Remote Audio/Video Monitor on Shabbat and Yom Tov – Gordon Tucker p. 222
  - May a Shabbat Service be Taped? - Arnold Goodman p. 229
  - On Recording Shabbat and Yom Tov Services - Elliott N. Dorff and Gordon Tucker p. 235
  - The use of a Remote Audio/Video Monitor on Shabbat and Yom Tov – Amy Eilberg p. 239
  - On recording Shabbat and Yom Tov Services – Howard Handler p. 241
6. Synagogue Policy Concerning Bringing Food Prepared in the Home into the Synagogue – George Pollack p. 290
7. A Question of Great Interest: May a synagogue Issue Interest-Bearing Bonds? – Ben Zion Bergman p. 319
8. The Printing of the Tetragrammaton in Hebrew Synagogue Stationery – Morris M. Shapiro p. 465.
9. Statement on Funerals in the Synagogue – Ben Zion Bokser p. 617
10. Interpersonal Relations (really about intermarried and outreach)
  - The Non-Jewish Spouse and Children of a Mixed Marriage in the Synagogue – Kassel Abelson p. 646
  - The Mitzvah of Keruv – Jacob B. Agus p. 660
  - Keruv and the Status of Intermarried Families – Joel Roth and Daniel Gordis p. 667
  - Comments on 'Keruv and the Status of Intermarried Families' – Seymour Siegel p. 674
  - The Mitzvah of Keruv – Harry Z. Sky p. 677
  - Synagogue Honors for the Intermarried Jew: Holding Office and Aliyyot – Joel Roth p. 682
  - Synagogue Honors for the Intermarried Jew: A Dissenting Opinion – Kassel Abelson, et al. p. 685
  - May the Reception Following an Intermarriage be Held in a Conservative Synagogue – Henry A. Sosland p. 686

11. Congratulations to Mixed Marriage Families – Jerome Epstein p. 689

**And from the 1991 – 2000 volume:**

1. Display of a Pasul Torah in a Museum Case – Kassel Abelson p. 151
2. The Role of the Non-Jewish Parent in Blessings for Bar and Bat Mitzvah – Jerome M. Epstein p. 602
3. Participation of Non-Jewish Parents or Grandparents in Home Religious Ceremonies – Jerome M. Epstein p. 605
4. Issues Regarding Employment of Intermarried Jew by a Synagogue or Solomon Schechter Day School – Jerome M. Epstein p. 608

**Remember, when reading any of these documents, that your congregational rabbi is the authority for the interpretation and application of all matters of *halacha* at your synagogue. ■**

---

*Rabbi Joel Roth is the Louis Finkelstein Professor of Talmud and Jewish Law at the Jewish Theological Seminary. He also serves as Rosh Yeshiva of the Conservative Yeshiva in Jerusalem. The Yeshiva, founded and maintained by the United Synagogue for Conservative Judaism, is under the academic auspices of JTS. Rabbi Roth has often been Scholar-in-Residence at NAAASE's Week of Study at the Seminary.*



# Synagogue Membership Dues: Good News & Bad News

## A Need for New Synagogue Membership Focus and Funding

Glenn S. Easton, FSA, ATz and Marcia K. Newfeld, FSA

There is good news and bad news. The good news is that in some communities, over 80% of the Jewish population has belonged to a synagogue at some time in their lives. The bad news is that a much lower percentage of Jews are actually affiliated at any given time. For example, in the Washington, DC area, only 37%<sup>1</sup> of the Jewish population is currently affiliated with a synagogue.



Glenn S. Easton



Marcia K. Newfeld

Synagogue lay leaders and professionals spend a major part of their time recruiting synagogue members for the obvious reasons of building community, maintaining continuity and ensuring the future of the Jewish people. But the most important reason that they are motivated to actively pursue additional members is that they feel it will provide the funds to maintain the congregation and its facilities and hold down spiraling membership dues rates. To test this theory, ask a synagogue lay leader or professional how much time, money and energy would be spent on membership

recruitment if the congregation already had sufficient funds to accomplish all of its goals and fulfill its mission.

If you applied a business model to synagogue membership, you might conclude that the focus of energy and activity should be on retaining members rather than recruiting new members. In business it is far easier to retain a customer than to obtain a new one.

What would our synagogues and synagogue budgets be like if we retained an 80% affiliation rate in every Jewish community?

Due to the perception that synagogues need to “grow their membership” in order to meet the increasing costs of maintaining excellent congregations, the majority of synagogue membership committees focus their attention on membership recruitment rather than on membership retention and integration. Experience has taught us that most of the members lost by the synagogue are those with whom no meaningful connection has been made. It is true that synagogues must recruit to replace members who move away and those who pass away, but the focus should be on membership retention and integration into the congregation for the synagogue to truly grow in significant ways.

The question then becomes why do members resign their synagogue memberships? What barriers keep prospective members from joining? One obvious answer is money. Synagogue membership dues are too high! Why should members have to pay thousands of dollars to identify with the Jewish community through synagogue affiliation? A member should not have to pay thousands, but should feel a responsibility to help support their Jewish community to a certain extent, but not to the detriment of their own personal or family economies.

Why should membership dues be required to affiliate with a synagogue? The notion that we could get something of value for free is alien to our society. Something that is free is perceived as being cheap and not of lasting value. However, our synagogues do offer many things of tangible as well as intangible value for members.

Why is it that synagogues that have experienced large membership growth still experience the financial pressure of trying to balance the budget? Increased membership calls for increases in services,





programming and educational opportunities. This increase in population causes the synagogue to be in a never-ending cycle of constantly trying to catch up with increased expenditures. This does not solve the problem. It only serves to perpetuate it. Why should synagogues be forced to spend so much time raising funds rather than raising Jews?

A recent synagogue budget survey conducted by the North American Association of Synagogue Executives (NAASE)<sup>2</sup> debunks one of the longest standing membership myths in synagogue management. The conventional wisdom maintained that the size of synagogue membership was directly proportional to the cost to operate the synagogue, expressed on a per member basis. Most synagogue leaders believe, in fact behave, as if more synagogue members directly correlate to lower costs to carry a member, and therefore a lower financial strain on the synagogue budget, resulting in lessening of the need to raise funds. In many instances, however, we see that synagogue lay leaders and administrators spend almost as much time raising funds as they do recruiting members. A logical business model for a synagogue would suggest meaningful economies of scale exist in larger synagogues with larger budgets, fundraising capabilities, and management.

For some reason, synagogues do not fit this logical model. The recent NAASE budget survey of nearly sixty Conservative synagogues of varying sizes throughout North America demonstrated that membership size and financial stability are not linked, as we may have thought. The survey demonstrated that except for small variables within membership size categories, it did not really matter if a synagogue had 300 households or 1,300 households, the cost of running the congregation was the same, approximately \$2,500 per household. The difference between the largest synagogues and the smallest synagogues was not significant. Larger congregations needed approximately \$2,700 per household, while smaller congregations spent approximately \$2,400 per household. This is the exact opposite expectation of those looking for economies of scale. Why, then, do we spend a majority of our time recruiting new members? It certainly can't be for financial security.

Given these myths and facts about synagogue membership and finances, congregations need to switch their focus to a different model for financing themselves in the future. It is a fact that high synagogue dues drive away current members and are a barrier to some prospective members. The solution is to have a permanent endowment to help with, if not replace, membership dues revenue.

Adas Israel Congregation in Washington, DC is a 1,650 household synagogue that generates approximately \$2 million from membership dues. Ohr Kodesh Congregation in Chevy Chase, Maryland is a 630 household synagogue that generates just under \$1 million from membership dues.

---

*The recent NAASE budget survey of nearly sixty Conservative synagogues of varying sizes throughout North America demonstrated that membership size and financial stability are not linked, as we may have thought.*

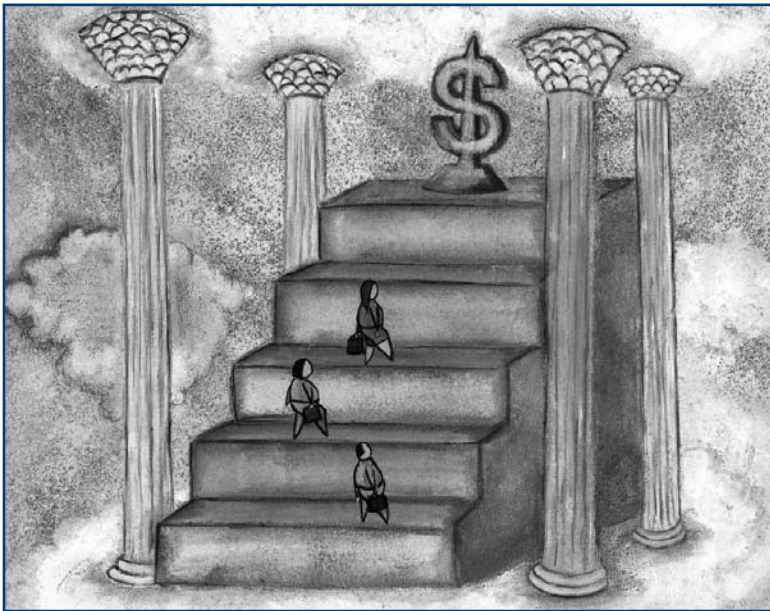
---

Not taking inflation into account, Adas Israel Congregation, therefore, would need an endowment of approximately \$40 million to generate the funds needed to replace membership dues at its current level, based on typical rates of return for funds invested in today's market. Ohr Kodesh Congregation would need an endowment of approximately \$19 million to cover its current membership dues revenue. Are endowments of these sizes attainable? The answer is not only yes, they are attainable; but in addition, they are compulsory if we want to adequately fund synagogues in the future and shift our focus and attention from raising funds to raising Jews.

Synagogue leaders must not be embarrassed or unmotivated to ask major donors for more significant and meaningful gifts. We must help our most successful businesspeople to understand the problem with current synagogue business models. We must convince our most generous philanthropists that the key to survival and growth of the Jewish people in North America is through synagogue affiliation and that it cannot be dependent on \$2,500 memberships and other extraordinary fundraising.

We must teach our major donors that it is as important, if not more important, to contribute a mega-gift to one's synagogue at least equal in proportion to their gifts to their community, their university, the symphony, or the museum. We must show our largest contributors the impact that a \$10 million endowment can have on

the future of Judaism, their synagogue and the Jewish people. It is our job to convince them that, even though their name may not appear on the side of a building, this donation, given in the spirit of *tzedakah*, perhaps even anonymously, is even more valuable than a multi-million dollar contribution to an already heavily endowed college or hospital. Look at the impact that the *Taglit - birthright israel* program has had on young Jews visiting Israel for ten days for the first time. We need to ensure that Jews of all ages have a life-long relationship with our Jewish communities. This is the legacy we need to ask our congregants to leave for the next generation.



Challenges to this new approach and philosophy do exist. Synagogues must convince donors to contribute toward this combined membership endowment fund rather than giving to personalized, special purpose funds. Major donors also need to understand that this is a one-time special purpose campaign and that this should not detract from their regular annual giving, planned gifts, or building fund contributions.

We have tried to answer the question of why people do not affiliate with a synagogue and why some members drop their affiliation. Is the reason the high price tag? Perhaps, but now we have the opportunity to lower the cost. We now understand synagogue economics. The good news is that we all have synagogue and community members who have the capacity to change the way synagogues are financed in the future to welcome all Jews to our membership rolls. We will still have to spend time and money on getting new members, but we will also spend more time embracing those members we have. We will be able to make synagogue affiliation more attractive and, at the same time, less costly than it is today. It would be a shame if we did not seize the moment to guarantee the future of our Jewish communities in North America. We must look to the future and find ways to raise Jews insuring that Judaism in our communities stays alive and well. ■

---

*Glenn S. Easton FSA, ATz, is the Executive Director of Adas Israel Congregation in Washington, DC and the current President of the North American Association of Synagogue Executives (NAASE).*

---

*Marcia K. Newfeld FSA, is the Executive Director of Ohr Kodesh Congregation in Chevy Chase, Maryland and the Treasurer of the North American Association of Synagogue Executives and President of the Mid-Atlantic Temple & Synagogue Administrators (MATSA).*

#### NOTES

- 1 "2003 Greater Washington Jewish Community Study," by Dr. Ira Sheskin, Charles & Mary Kaplan Family Foundation, March 2004.
- 2 "Synagogue Budgets: A Comparative Look at Revenue & Expenses," by Luis Dorfman, Harry Hauser, Gabriel Miller, and Glenn Easton, North American Association of Synagogue Executives, 2004

# The Lay/Professional Partnership: Working Toward a Congregational Model

Caroline Musin

21

## The Synagogue World

Historically, the relationship between lay leaders and professionals in synagogues has been different from other Jewish communal organizations. Synagogues are religious organizations designed to promote spiritual well-being, rather than social service agencies whose missions lean toward more tangible needs. Additionally, the primary professionals in synagogues are clergy—rabbis and cantors. Widely considered *klei kodesh*, sacred vessels, their facility with our tradition's texts and commitment to pastoral needs have often placed clergy on a different plane from other professionals. If another professional has existed in the synagogue, it has been the religious school principal or director of education. The synagogue has generally been a decentralized organization, with a board of directors and numerous committees carrying out the congregation's mission.

Today, however, a synagogue may have a much larger professional staff—executive director, youth director, family educator, and program director are some of the positions found in a typical North American congregation. This increase in synagogue professional staffing has brought significantly more opportunities for engagement between professionals and the lay leadership of the congregation. This engagement can come through committee work, board meetings, and the day-to-day interactions among people within the congregational setting.

This article addresses the history of lay-professional partnerships in the Jewish communal world and the implications of that history on the synagogue world, and concludes by defining effective models of lay-professional partnerships as evidenced by research conducted during my NAASE internship.

## Literature Review

Many articles have explored various aspects of the organizational structure in the Jewish communal service world and specifically, lay-professional relations. I reviewed different aspects of the lay-professional relationship, including history, sentiments and expectations, roles and responsibilities, areas of concern, and impact in the synagogue setting. A few salient points from the literature review:

- Professionals are dedicated and talented but must have the unending support of their lay

leadership. Although lay leaders are legally and fiscally responsible for organizations, they must work alongside professionals in order for Jewish communal organizations to operate at optimal levels.

- Unlike past generations of Jewish communal professionals, current professionals are “better educated and trained to handle the complexities of establishing and running large human service agencies; [they are skilled in] management, fundraising, and communications...[and] are also experts at preparing policy options and issue alternatives for board discussions.”<sup>1</sup>
- Professionals are often concerned that lay leaders will not know how to conduct objective evaluation, fearing that the process will become personal and accusatory, rather than constructive and beneficial to all parties. This process can be improved if professionals ensure that discussion about how the professional's job is structured and evaluated is somehow included in the lay leader training process.
- In order to work effectively with the new paradigm of lay leaders, experts suggest jointly-developed job descriptions for all parties, as well as leadership training for lay leaders and group decision-making in order to maximize everyone's successes.<sup>2</sup>
- A study by Gerald Showstack showed that executives and lay leaders in synagogues and Jewish educational settings received higher mutual performance ratings than did their counterparts in other Jewish communal organizations.<sup>3</sup> However, he suggests that this is the case because neither lay leaders nor professionals in the synagogue setting are as savvy as in other Jewish communal agencies, and that this may have influenced performance ratings.<sup>4</sup>



Caroline Musin

## Research: NAASE University and the Questionnaire

To further explore the current attitudes professionals have towards lay leaders, I met with over 100 synagogue executive directors from across North America at the NAASE Conference in Israel in February of 2005. At a session I conducted to discuss the lay/professional partnership for NAASE University, an educational component of the week, executive directors were asked to provide words that described their current relationships with lay leaders. Both positive and negative terms were shared in this brainstorming process.

The executive directors suggested that these words often reflected issues of control. Relationships between lay leaders and professionals can be partnerships, employer/employee-based, or friendships, and often there is confusion over which “hat” people are wearing. Some of the executive directors felt that at one time the relationship was a true partnership, but the relationship had evolved into something that more closely resembles that of a formal employer/employee relationship.

Many of the individuals mentioned mutual respect, communication, and flexibility as key components of healthy lay/professional relationships. The executive directors felt that it was their responsibility to ensure that these relationships thrive. One executive recommended continuously cultivating the relationships, and being persistent; but he also recognized that often a relationship could change at the whim of a particular board or president. It’s critical, another executive director stated, that the “inbred culture” change; that is, that we cannot expect lay leaders to simply “become” leaders, even if they have taken a well-planned path through committees, boards, and other lay involvement. Training lay leaders is critical; it allows them to be more effective in their positions and can only help professionals to be more effective in theirs.

Generally, the executive directors noted that until recently, lay-professional relationships had never been an issue. Each president is only in place for two years, which means that (for better or for worse) it feels as if the specific roles and responsibilities of the executive director also change every two years. One individual suggested that NAASE put together a committee on lay-professional relations in order to promote best practices in facilitating better working relationships.

In addition to the discussion at NAASE University at the Conference, all NAASE members (including those not present at the conference) were asked to fill out a questionnaire.

### **Descriptive Analysis of Questionnaire**

The respondents were almost perfectly split by gender, with 49% female and 51% male. More than half of the respondents are between the ages of 50 and 60. Nearly everyone else was 40s or 60s (22% or 18%, respectively), with only 4% reporting an age under 40. Most executive directors came to the field from a variety of unrelated careers. Some of these careers were in the Jewish communal world, including Hillel, United Synagogue of Conservative Judaism, Jewish Community Centers, Federation, and Israel Bonds, while

others were at non-profit organizations, and still others were in the corporate world in various educational and management positions.

Roughly a third of the executive directors who responded are in their first ten years working the field. Nearly another third are proceeding into their second decade on the job. A very small minority has been in the field for over twenty years.

The vast majority of the respondents work at congregations in the Northeast, predominantly in the New Jersey, Philadelphia, and Washington, DC areas. However, individuals in California, Texas, Florida, Ontario, and throughout the Midwest also completed questionnaires. This distribution is not completely consistent with NAASE’s membership distribution, which includes thirty-four states and five provinces. However, the regions with the largest concentrations of executive directors did have the largest representation among the respondents.

The executive directors completing the survey were asked what percentage of their membership they know by name. On an absolute basis, the results are almost evenly divided by quadrants. Generally speaking, the percentage of congregants known is inversely related to the size of the congregation; that is, executive directors in smaller congregations are more likely to know larger proportions of their membership than are executive directors in larger congregations.

Executive directors have responsibilities in a variety of areas, including policy development, office management, fundraising, member services, facility management, public relations, financial management, and staff supervision. The respondents indicate that they work with lay committees on most, if not all, of these tasks. This shows a necessity for positive, effective relationships between professionals and lay leaders—the lay leaders are present and involved in most aspects of the executive director’s job.

The frequency of contact between the executive director and lay leaders and other professionals can be measured quantitatively. The executive directors reported on the frequency of this contact and the changes, if any, that had occurred during their tenure. As can be expected, contact comes in many forms—board meetings, committee meetings, individual meetings, telephone calls, and e-mail communications, as well as informal conversation.

Executive directors meet with their rabbis on a regular basis. As demonstrated in Graph A, most respondents



report contact multiple times each week; many noted that weekly formal meetings take place but that informal conversation occurs on an almost-daily basis.

Contact with other professionals is also critical. Although several individuals report not having regular formal or informal meetings with other synagogue professionals, high numbers of executive directors report weekly scheduled meetings and frequent informal contact with the cantor, director of education, and other professionals in their congregations. Several respondents say that they initiated regular staff meetings upon their arrival. Others say that the frequency of these meetings has “evolved significantly over time.”

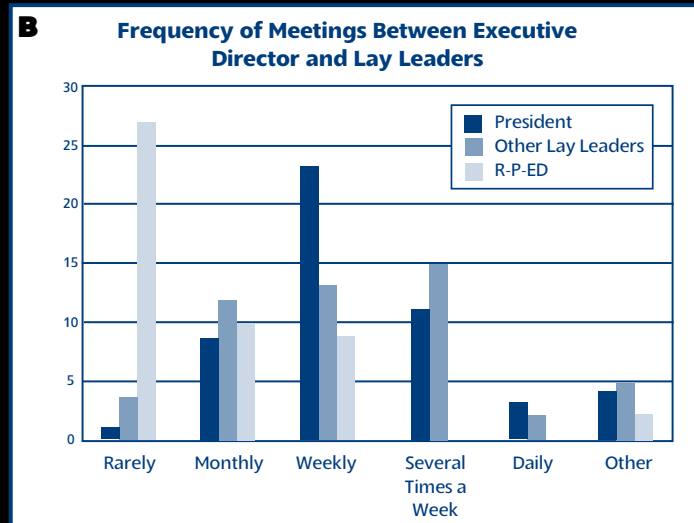
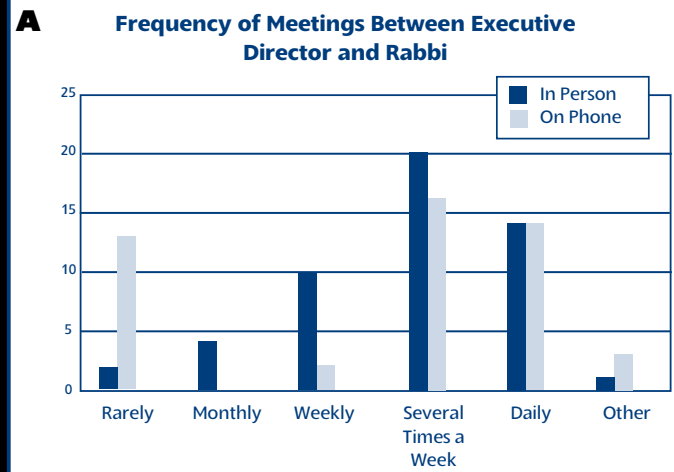
In addition to regular communication with the professional staff, the executive directors work extensively with lay leaders (see Graph B). Most executive directors work with a number of committees, many relating to the areas of responsibilities detailed previously. Results indicate that executive directors generally serve as staff liaisons to the executive, finance, budget, membership, and house committees. Many executive directors reported a variety of other committees whose meetings they attend regularly or on an as-needed basis, including but not limited to catering, programming, ritual, youth, social action, and strategic planning.

Nearly all of the executives (92%) attend board meetings monthly; interestingly, the remaining fraction meets with their board on a semi-monthly or weekly basis. (In one case, the board meets monthly and the officers meet weekly.)

Some executive directors have regular one-on-one meetings with their presidents. It is unclear whether these meetings, as well as the meetings detailed with other lay leaders, are more formal or informal. One concern that was described anecdotally was the frequent disconnect between the three top figures in the synagogue—the rabbi, president, and executive director (R-P-ED). Often any two of these people may discuss issues but leave the third out of the information loop. When asked how frequently these three individuals meet together, more than half of the executive directors surveyed report rarely having such a meeting. One executive director said that at the beginning of her tenure, she met with the president and rabbi together only during crises, but since then they have made the move to weekly meetings together.

The literature review suggests appropriate training for lay leaders is an important issue. In the questionnaire,

executive directors were asked about formal training processes for lay leaders within their congregations. More than half of the respondents report that formal board development takes place in their congregations. Where training did take place, the executive director, president, and/or officers usually planned it. Only four executive directors in the sample reported having a



board development committee entrusted with the planning. Some congregations encourage board members to participate in external leadership training, while others develop internal training. Nearly all of the executive directors whose synagogues offer lay leader training report that they participate in the training alongside the lay leaders.

Most executive directors report having generally positive interactions with their congregants. When provided a list of descriptors for lay leaders (and then the same list for

congregants in general), respondents almost universally report with glowing adjectives: friendly, cooperative, productive, usually comfortable, efficient, and easy-going. Nearly every respondent noted friendliness and cooperation in their lay leaders and congregants.

### Successful Characteristics of the Lay-Professional Relationship

Most executive directors have weekly or monthly professional staff meetings, and from the responses in the questionnaires, these seem to be helpful in conveying critical information and maintaining a shared vision within the congregation.



It seemed that nearly every board of directors met monthly or more frequently and included the executive director, which seems to be the most successful approach.

Although a small sample of synagogues hold regular meetings with the rabbi, president, and executive director around the same table, this seems to be an effective model and executive directors would do well to encourage it in their congregations.

Formal training during each board cycle, for new board members at the minimum, appears to be a useful method for preparing congregants to be effective lay leaders. The cultivation and development of lay leadership requires significant front-end work by the executive directors (and ideally includes the creation and support of a lay training committee). However, it seems that the benefits reaped almost certainly exceed the effort involved.

### Conclusion

As the American Jewish community and its synagogues continue to evolve, the lay-professional relationship will face new challenges. Lay leaders have less and less time to give, so they expect that their time will be well-spent. Professionals face a shortage of qualified lay leaders with whom to partner and therefore need to cultivate and develop those in their midst. It is time for executive directors to work with their current lay leaders on a process to prepare the next generation of lay leaders in the synagogues and the rest of the Jewish community. In order to survive and prosper in the twenty-first century, this partnership must continue to evolve in a positive direction. ■

---

*Caroline Musin attended the Hornstein Program in Jewish Communal Service at Brandeis University. During that time she interned with NAASE at Temple Emunah in Lexington, Massachusetts.*

#### SOURCES:

Bubis, Gerald B. *The Director Had a Heart Attack and the President Resigned*. Jerusalem Center for Public Affairs: Jerusalem, Israel, 1999.

Cardin, Shoshana S. "The Future of the Profession: A Lay Leader's Candid View." *Journal of Jewish Communal Service*. Vol. 66: 131.

Easton, Glenn S. "Computers Enhance Volunteerism." *NASA Journal*. Fall 1989: 18-19.

Easton, Glenn S. "Volunteers in the Synagogue: One Approach." *NASA Journal*. Fall 1989: 15-17.

Goldstein, Louis, Ph.D. "The 'Partnership' of Executive and Board—Myth or Reality." Reprinted in *Journal of Jewish Communal Service*. Vol. 66: 130.

Greilsheimer, Louise B. "Volunteer-Professional Relations: A View From Both Sides." *Journal of Jewish Communal Service*. Fall 2002: 57.

Kaplan, Lester I. ACSW. "Strengthening the Lay-Professional Relationship: A Professional's Perspective." *Journal of Jewish Communal Service*. Vol. 66: 121.

Ritz, Esther Leah. "Strengthening the Lay-Professional Relationship: From a Lay Leader's Perspective." *Journal of Jewish Communal Service*. Vol. 66: 126.

Showstack, Gerald L. Ph.D. "Lay-Professional Relations in Jewish Communal Institutions." *Journal of Jewish Communal Service*. Vol. 66: 62.

#### NOTES:

1 Greilsheimer, Louise B. "Volunteer-Professional Relations: A View From Both Sides." *Journal of Jewish Communal Service*. Fall 2002: 57.

2 Ritz, Esther Leah. "Strengthening the Lay-Professional Relationship: From a Lay Leader's Perspective." *Journal of Jewish Communal Service*. Vol. 66: 126.

3 Showstack, Gerald L. Ph.D. "Lay-Professional Relations in Jewish Communal Institutions." *Journal of Jewish Communal Service*. Vol. 66: 62.

4 Showstack, op. cit.

# Sof Hadavar - End of the Discussion: Money in Synagogues

Guest Commentary by Rabbi Mordechai Liebling

25

Reprinted with permission from *Sh'ma: A Journal of Jewish Responsibility* ([www.shma.com](http://www.shma.com)) March 2005.

The typical synagogue board devotes more time to issues relating to money than anything else. But, then, more of the 613 *mitzvot* relate to money than any other subject. This is indicative of the central role that money plays in our lives, evidenced by Rabbi Yishmael's comment in Bava Batra, "One who wishes to acquire wisdom should study the laws of money, for there is no greater area of Torah study than this. It is like an ever flowing stream...."

A congregation sends messages to members and potential members about money in myriad ways: structuring dues and tuition, fundraising, setting catering policies, maintaining the building and property, paying staff, caring for members in need, allocating funds for programs, relating to other organizations in the community. The financial decisions that synagogue leaders make impact the culture of money. Does this culture reflect the Jewish values this leadership professes to hold?

Like Americans in general, Jews don't like to acknowledge and articulate differences in socio-economic status. And yet, the differences in wealth and income in the United States are the greatest in over 100 years. While recent statistics on poverty from the National Jewish Population Study surprised many people, few congregations addressed the implications of the data or created policies and a community climate where people of widely different economic means could feel comfortable.

Many congregations state that dues payments should not be a barrier to membership and reduced rates are available. But studies show that the process of applying for a dues reduction is humiliating. In some congregations the process itself is unfriendly — even to the point of asking for income tax forms. Increasingly, congregations are examining fair share dues, a structure based on income that alleviates the need to apply for a reduction.

Other challenges to creating a comfortable financial climate in the synagogue community exist: How obligated is the institution to help members feel comfortable? Little can be done about the cars members drive, the schools children attend, or the vacations families enjoy. But a great deal can be done about the assumptions that the synagogue makes. The synagogue needs to be very conscious of the underlying economic assumptions made vis-à-vis programs and public statements.

Presuming that everyone is at least "middle class" and won't have trouble spending the extra \$10 or \$20 for a special program or school event is incorrect.

Celebrations are perhaps the most visible manifestation of wealth differences. Synagogues can set standards or guidelines about the lavishness of a *kiddush* or even a bar or a bat mitzvah party. I know of at least one synagogue that has a policy that meat cannot be served because there are some families who can't afford to serve meat at their *simchah* and these families shouldn't be made to feel poor. Hundreds of years ago medieval Jewry created sumptuary laws to regulate conspicuous consumption; perhaps we need to reconsider them.

Synagogue membership, like religious school tuition, raises several ethical questions: Should individual synagogues ensure that anyone, regardless of economic means, can be a member? Is the wider Jewish communal structure responsible to subsidize membership for those in need? Does money change the culture of the community?

Ethics play a part in other synagogue financial decisions. For example, the synagogue employs professional, administrative, teaching, support, and janitorial staff. While rabbinical associations have fought hard for rabbis to receive good salaries and benefits, most synagogues don't provide the same benefits to clergy and non-clergy. Is the synagogue responsible to pay for pension and health care for staff that work half-time or more? Does the synagogue pay a living wage to its lowest paid staff? In the Washington D.C. area, the responsibility to pay a living wage became a contentious issue in the Jewish community. One synagogue that contracted out its janitorial staff learned that the contractor did not pay its staff a living wage. The synagogue made a special arrangement that for the tasks the contractor performed at the synagogue the workers would receive a living wage. Judaism has very strong values that protect the rights of workers; synagogues, as employers, have an obligation to uphold these values. ■




Rabbi Mordechai Liebling

*Rabbi Mordechai Liebling is the Vice-President for Programs at the Jewish Fund for Justice. He teaches Congregational Systems Dynamics at the Reconstructionist Rabbinical College and is the former Executive Director of the Jewish Reconstructionist Federation. He consults with congregations about their culture of money.*

**ONE GREAT  
ASSOCIATION!**



**TWO GREAT  
LEARNING  
OPPORTUNITIES!**

**16th Annual** Week of Study  
at the  
 **JTS** The Jewish  
Theological  
Seminary

**New York City • June 18 - 22, 2006**

*Creating Kehillah Kedoshah,  
A Sacred Community:  
Bringing Jewish Ethical Values  
into Our Daily Lives*

**Topics for study will include:**

- ☆ Chesed
- ☆ Tzedakah
- ☆ Tikun Olam
- ☆ Business Ethics
- ☆ Social Justice
- ☆ Our Obligation to Jews and Non-Jews



**• Networking • Interaction • Professional Education • Career Development and Placement**

*For more than half a century, NAASE, the North American Association of Synagogue Executives, has been helping synagogue administrators create vibrant Jewish communities throughout the world.*

*NAASE offers wide-ranging educational programs, career executive support and networking opportunities that develop and enhance the skills of synagogue executive directors and administrators.*

**Some of the Association's most popular programs:**

- |   |   |
|---|---|
| Conventions and Conferences                               | Placement Services                                  |
| Regional Group Meetings                                   | Professional Development/Certification Programs     |
| Professional Journal                                      | Week of Study at the Seminary                       |
| Mentoring and Conference Buddy Initiative (Yedid Program) | Model Professional Contracts                        |
| Programming/Administrative Resource Center (ARC)          | Joint Retirement System Option                      |
| Telecommunications (Website and ExecNet Listserv)         | Professional Surveys                                |
| Social Action / Awareness                                 | Ozrim Consultations Program for small congregations |

*Please ask us about these or other professional activities and opportunities, or read about them on-line at [www.naase.org](http://www.naase.org)*

NAASE at Rapaport House - 155 Fifth Avenue, New York, NY 10010 (212) 533-7800 Ext 2609

NAASE Long Island Office - voice/fax: (631) 732-9461 e-mail: [office@naase.org](mailto:office@naase.org)

Glenn S. Easton, FSA, ATz, President • Harry Hauser, Executive Director

**CREDITS**

- Cover illustration by Index Stock Imagery Incorporated; used with permission.
- Illustrations and photos on pages 4, 6, 13, 17, 18, 20, and 24 by Index Open, a service of Index Stock Imagery, Incorporated; used with permission.
- Illustrations on pages 12 and 16 are photographs of windows designed by Sampson Seymour Engoren, copyrighted 1983, installed in Beth Israel Congregation, Owings Mills, Maryland. Photographed by David I. Rothenberg for use in *The NAASE Journal*.
- Graphic Design by Goin' Graphic. • Printing by Prestige Printing. • Distribution and mailing by Letter Perfect Mailing Services.