

THE NAASE - USCJ JOINT COMMISSION FOR THE PLACEMENT OF EXECUTIVE DIRECTORS

A SACRED ROLE

The Holy Work of the Kehillah's Executive Director

The executive director plays a crucial role in the life of your community. They bring dedication, a network of colleagues, and a growing skill set to the *Kley Kodesh* (holy leadership), the group entrusted with impactful work for the Jewish community.

This packet aims to spark discussions among synagogue leaders about their vision and the role of a new executive director, tailored to the congregation's unique needs, culture, and potential. The materials will aid in creating an effective job description that aligns with the congregation's goals and expectations. These tools will help the search committee align the congregation's priorities and vision with the right executive director, who can bring these aspirations to fruition.

We wish you great success in your search and in shaping the future of your kehillah!

1. The Search Process: Getting Started

naase.org/placement

How the process works, with some suggestions for getting started, and how to utilize the resources of the United Synagogue of Conservative Judaism (USCJ) and the North American Association of Synagogue Executives (NAASE). The on-line availability of several additional resources that may be useful both during and after the search process

2. What is the Work of an Executive Director?

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Despite the wide array of skills and areas of expertise of synagogue executives, some commonality exists as to the areas in which most executives function and the areas of responsibility in which they lead.

3. Prioritizing the Roles

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A 12-role priority scale with which your search committee and leadership can establish what the priorities are for your own kehillah.

4. Presenting the Position Profile

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Between deciding what the kehillah is seeking and finding the right person to assume the role, is the matter of designing the position announcement to its best advantage.

5. Selecting the Elements of the Professional Contract

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A synopsis of the contractual elements most often found in professional agreements with synagogue executives.

WHAT IS THE WORK OF AN EXECUTIVE DIRECTOR?

GETTING TO SPECIFICS

Synagogue Executive Directors are both generalists and specialists . . . characterized by as much diversity as the congregations that they serve. While their areas of responsibility vary, most Executive Directors find themselves engaged in broadly similar categories of synagogue life at their respective congregations, while focusing on several primary areas as the needs of their individual congregation require. This brochure lists many of these categorical areas of expertise.

As a member of the Kley Kodesh, the Executive Director is a member of the senior professional staff along with the Rabbi, Cantor, Educational Director, and Youth Director. Working closely with the Rabbi and synagogue President, s/he is the person responsible to the Board of Directors for most administrative, business, financial, physical plant and staffing aspects of the congregation. The Executive Director is a key link to current and prospective synagogue members, as well as the liaison and resource person to the Board of Trustees, committees and community organizations.

The Executive Director is responsible for maintaining the synagogue calendar and assisting families with life cycle events, S/he might be a visible presence at Shabbat and holiday services, be responsible for cemetery operations, and edit the congregation newsletter. Others may also assume additional responsibilities for ritual, youth, fundraising or synagogue programming.

In addition to those with degrees or experience in Jewish communal service, Executive Directors come to synagogue administration from many diverse backgrounds, including business, education, law, social work, and non-profit administration, among others.

This is a composite list of many of the areas of expertise and responsibility with which an Executive Director may have experience. Of course, your leadership will decide which collectively best characterize the needs of your congregation. It is our hope that this brochure will trigger useful conversations by your Search Committee as the goals and aspirations are set for your ideal Executive Director.

ADMINISTRATIVE FUNCTIONING

Resource for Board of Trustees/committees
Board leadership training
Agenda development
Liaison to all auxiliary organizations
Program ideas/techniques
Financial reports and analysis
Representative to Board/committees

Fiscal Management

Accounts payable / receivable
Financial reporting
Budgeting
Purchasing / contracting
Special arrangements
Investments (w/appropriate lay committee)
Insurance

Facilities Management

Building usage scheduling
Space allocation / preparation
Building maintenance / repair
Personnel management
Cemetery management
Security

Prioritizing, Maintaining, Implementing Synagogue Calendar

Bar / Bat Mitzvah dates
Synagogue events / holiday programming
School / youth programming
Weddings and receptions
Meetings
Community usage

On-Site Implementation of Board Policy

Computer Management

- Hardware / software
- Membership database
- Cemetery control

Personnel management - support staff
Mailings / newsletters
Liaison to volunteers

DEVELOPMENT ROLES

Fundraising events
Long-range planning
Capital / endowment campaigns
Fund development and special needs appeals

MEMBERSHIP

Recruitment / retention
Liaison to:

- Volunteers
- Membership
 1. New members
 2. General membership
- Officers and Board of Trustees
- Committees

COORDINATION WITH PROFESSIONAL STAFF

Special projects / events
Holiday programming
Regular synagogue activities
Assisting families with life-cycle events

SYNAGOGUE FOOD SERVICE COORDINATION

Oneg Shabbat / Kiddush
Receptions / celebrations
Caterer coordination (in-house or panel)
Kashrut supervision

PUBLIC RELATIONS AND OUTREACH

Dissemination of Congregational News via:

- Bulletin Flyers News releases
- Advertisements
- Website E-mail
- Other electronic distribution

Community Outreach

- New Americans
- Jewish / Non-Jewish community groups

Maintain synagogue archives
Dissemination of Congregational News via:

- Bulletin

SECURITY PLANNING, TRAINING AND REVIEW

Development of comprehensive plans
Interface with law enforcement agencies
Periodic plan review and updating
Training/practicing/modifying of protocols
Development of resources, as needed

THE ROLE OF THE EXECUTIVE DIRECTOR IN YOUR KEHILLAH

An executive director's role is a composite of many areas of responsibilities and diverse skills. No one person can fill all the roles that could be expected of an executive director today. This questionnaire is intended to help guide your search committee in prioritizing the roles as they apply to your kehillah.

Rank what you consider to be the congregational priority of each of the 12 roles below, from 1 to 12 [with 1 being "most important"; 12 being "least important"]. And then assist your committee in reaching a consensus.

The ED as an operations manager Priority ____ [1-12]

The ED establishes and oversees the many operations throughout the kehillah, as a main task.

The ED as a building manager Priority ____ [1-12]

A 12-role priority scale with which your search committee and leadership can establish what the priorities are for your own kehillah.

The ED as a financial manager Priority ____ [1-12]

The ED is fully involved in all aspects of the congregation's finance, from computer reports to purchasing and investments.

The ED as a development leader Priority ____ [1-12]

The ED works to establish fiscal and volunteer development policies to assure the long-term operational health of the kehillah.

The ED as a team leader Priority ____ [1-12]

The ED sees the role of leading the office, building and support staffs as the main task.

The ED as a governance leader Priority ____ [1-12]

The ED helps create an operational structure for the kehillah and works collaboratively with staff and lay leaders.

The ED as a Board resource Priority ____ [1-12]

The ED ensures the Board (and committees) has information, staffs committees which fall in operational areas, and offers guidance on matters under deliberation.

The ED as a congregational motivator Priority ____ [1-12]

The ED serves as a "cheer leader" for the kehillah and its programming.

The ED as a face of the kehillah Priority ____ [1-12]

The ED regards positive interactions with members and potential members, as basic to the role.

The ED as team player and role model Priority ____ [1-12]

The ED regards positive interactions with members and potential members, as basic to the role.

The ED as an educator Priority ____ [1-12]

The ED works with staff and lay leaders in the creation and execution of Shabbat, holiday and other programs.

The ED as a support in times of sorrow Priority ____ [1-12]

The ED takes an active role in cemetery operations as well as coordination of services needed by those who have had a death in the family.

SEARCHING FOR THE EXECUTIVE DIRECTOR: PRESENTING THE PROFESSIONAL PROFILE

Enhancing the search process' goal of attracting the highest caliber candidates, by means of presenting the congregation's visage in the format of a professional profile

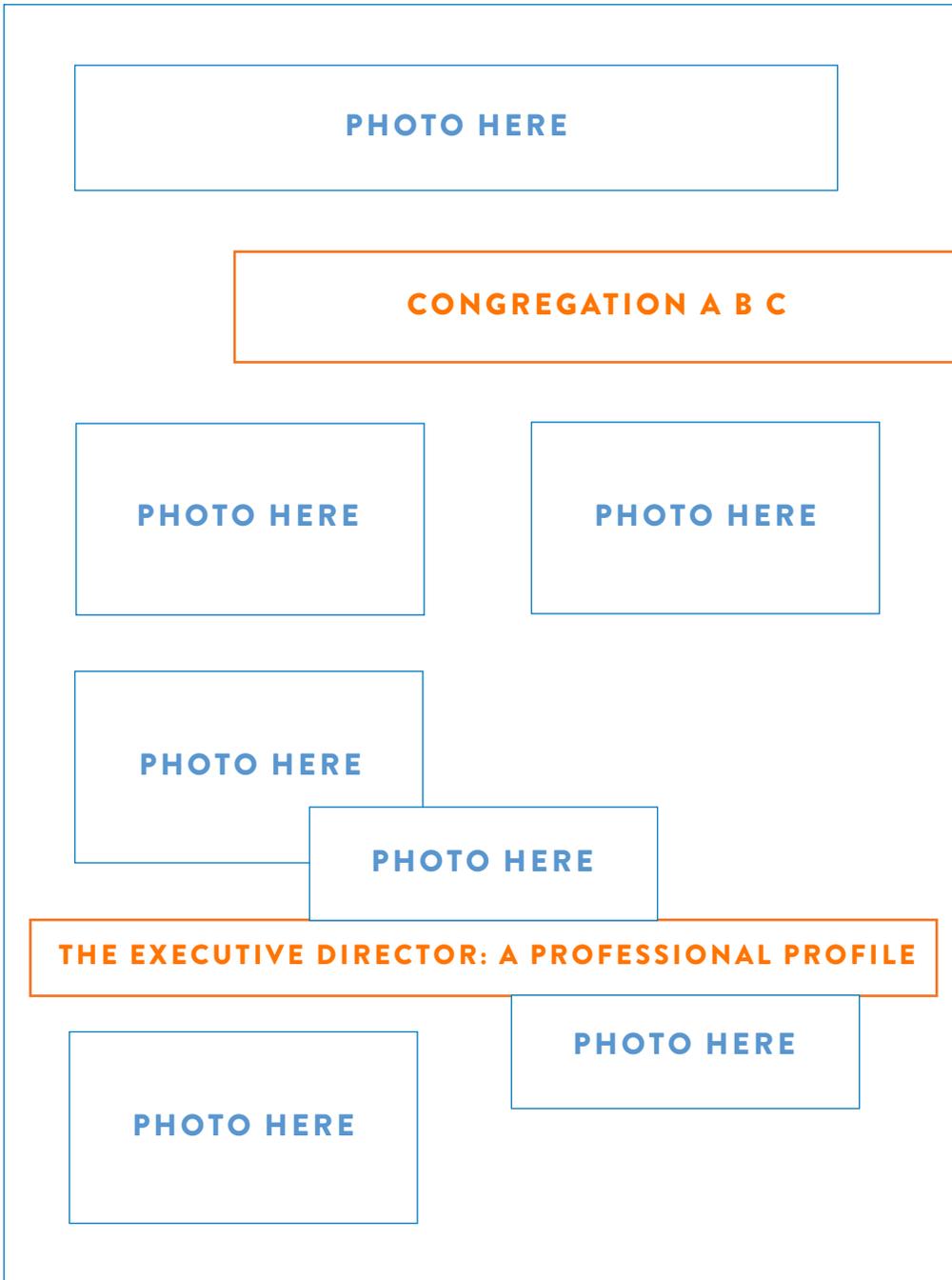
A frequently overlooked aspect of the search and interview process, is the "presentation" of the position profile. While the Search Committee may well have developed a thorough concept of the new position and various aspects of responsibility and goals, through its various developmental stages, and have taken steps beyond simply listing the vacancy and compensation, and conveying those perceptions to potential candidates. But this is a task all too often left to chance.

The Search Committee would do well to balance the emphasis on compensation, with an effort to find the individual attracted by the unique opportunities presented by the congregation's programs, culture, mission and prospects. That is the purpose of the Professional Profile document.

This "mock up" for such a document isn't a "boiler plate," but is intended to trigger thought as to how the Search Committee might present the professional opportunity to experienced candidates who know that the position exists in a congregational context, and would need to know how the congregational leadership sees the "bigger picture". Certainly, no one knows your kehillah's personality, culture and expectations better than the synagogue leadership engaging in this exercise. Likely to run some three to four pages, many presentation formats might flow from this prototype, but the best one for your congregation will evolve from your own expectations, creativity and enthusiasm.

Before "going public, the sections illustrated in the attachment should be explored...

1. Telling the story photographically
2. The Executive Director position summary
3. The congregational overview



A few well-chosen photos that together tell your story... a compelling visual portrait of who you are!!

EXECUTIVE DIRECTOR POSITION SUMMARY

How the congregation sees that person... what attributes the occupant of that position exhibits in the congregational context... as a member of the senior executive staff, with whom does the Executive Director partner and in what major projects is the person most visible or impactful... what's expected of the person in goal-oriented and process-oriented terms

CONGREGATION ABC OVERVIEW

Who are you... how has your history prepared you for your current status and position in the community and in the Conservative Movement... how does the congregation see itself... awards and recognition earned by the congregation that represent the mission it has charged itself with...the Rabbi, Cantor, other professionals and the unique "blend" they represent... congregational aspirations

THE EXECUTIVE DIRECTOR'S MAJOR AREAS OF RESPONSIBILITIES

1. XXXX XXXX XXXX XXXX XXXX XXXX
 - XXXX XXXX XXXX XXXX XXXX XXXX
 - XXXX XXXX XXXX XXXX XXXX XXXX
 - XXXX XXXX XXXX XXXX XXXX XXXX
2. XXXX XXXX XXXX XXXX XXXX XXXX
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3. XXXX XXXX XXXX XXXX XXXX XXXX
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 - XXXX XXXX XXXX XXXX XXXX XXXX

MINIMUM QUALIFICATIONS

- XXXX XXXX XXXX XXXX XXXX XXXX

EXPECTED COMPENSATION AND BENEFITS PACKAGE

- XXXX XXXX XXXX XXXX XXXX XXXX

GUIDELINES FOR APPLICANTS

What should interested candidates do... how may they follow-up to determine status... how will the congregation proceed and respond including declinations... anticipated timeframe... how references will be handled . . . electronic or hard-copy preferences

SELECTING THE ELEMENTS OF THE CONTRACT WITH THE EXECUTIVE DIRECTOR

This booklet is intended primarily to serve as a guide of congregations who are entering into contract discussions with their about-to-be-hired Executive Director for a newly crafted full-time professional position.

While contracts vary greatly in format, depth, specificity, inclusion and compensation levels, a composite image emerges as to the main elements most often found in the long-term (multi-year) contracts studied for this survey. The reader is urged to view this aggregate “wish list” with great caution, as it represents no actual document nor any single individual contractual agreement . . . rather it is intended to trigger the shared thinking process of the congregational leadership about to engage in discussions with its new Executive Director, on the matter of which items to consider for inclusion in a compensation document. This booklet is offered solely as a stimulus for discussion and consideration of concepts, and maybe a valuable addition to other available resources including the booklet “What Is The Work Of The Executive Director?” and the reprint “Developing the Professional Contract with the Executive Director: A Guide to Congregational Practices”.

Most congregations construct parallel but distinct documents - one spelling out responsibilities, authorities and review process, often referred to as a job description; and the other, being the actual formal professional contract format. The latter is sometimes as basic as a two page itemization, and at other times, results in a more complex agreement with numerous sections. In either case, clarity is paramount, to forestall any future misunderstandings, as is its accurate reflection of the understandings arrived out by the parties.

Congregations are urged to view such matters as resulting from enthusiastic discussions between parties with shared visions, goals and expectations for the synagogue’s future leadership.

This booklet is not intended to be viewed as an offer of legal, accounting, tax or other such advice, though the reader is urged to seek appropriate counsel in such matters.

Here are the remunerative elements found most often in contracts studied by the NAASE Contracts Survey Committee:

Term of the contract:

often two years initially, then three, then five and longer

Salary:

at a level that reflects a realistic assessment of the costs of living in that region, and that allows the executive to live in, or close to, the community served by the congregation; with specified increases over the life of the contract; the level needs to reflect in some measure geographic location, congregation size, educational background, professional responsibilities and experience, staff size and existing contractual salaries, congregational financial status, and other “job market” factors

Pension contribution:

often increasing over the life of the contract; sometimes jointly contributory (“matching”)

Medical insurance coverage:

usually for the individual fully; may include the spouse/family fully as well, or an allowance for family premium

Vacation:

most often 4 weeks or a month, though initially many are for two or three weeks; unused time usually not carried over to successive years

Professional association dues/membership:

usually paid in full

Convention(s) attendance / “professional growth”:

usually capped; sometimes allows for rollover of unused amounts with a cap or time limit

Synagogue membership:

courtesy (limits voting or other privileges), usually for full family, often including religious school education / life-cycle events

Severance:

most often found in multiple-year contracts or in renewed contracts; a formula such as a lumpsum payment equivalent to anywhere from one week to one month’s salary for each full year completed, after the sixth year

Increasingly, executives have mentioned that their contracts include provisions such as:

- Life insurance coverage
- Disability insurance coverage
- Long-term care insurance coverage
- Dental/optical insurance coverage
- Travel reimbursement/allowance
- Moving/relocation expenses
- Educational (professional) expense reimbursement
- Other provisions designed to meet the unique needs of both individual executives and congregations alike