

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

## Developing the Job Description for the Executive Director: Triggering the Conversation: Goal-setting, Partnership, and Envisioning

This guide is designed to help United Synagogue-affiliated congregations plan for hiring their first Executive Director. It can also assist those evolving current positions. It works best alongside our other resources at [www.naase.org/placement](http://www.naase.org/placement).

The guide is not a one-size-fits-all solution but offers a variety of job descriptions currently in use, showcasing the diversity in professional synagogue management. These are meant to stimulate in-depth discussions among those planning the executive leadership role, helping to tailor it to your synagogue's specific needs.

A key consideration is whether to integrate the job description into the executive's contract or to keep them separate. There's no consensus on the best approach; this guide includes examples of both.

Ultimately, a well-crafted job description is a crucial tool. It guides both the executive and the leadership, reflecting the evolving needs of the congregation and the goals of the Kley Kodesh partnership. Regular reviews of the job description ensure it continues to meet these evolving needs and goals.

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

## EXHIBIT A CONGREGATION AAAA EXECUTIVE DIRECTOR JOB DESCRIPTION

The Executive Director serves as the Chief Executive Officer of the Congregation, representing the officers and directors in administering the affairs of the Congregation. He works in partnership with the clergy and lay-leaders in recommending synagogue policies. The Executive Director assumes responsibility for loyalty to the purpose of his Congregation and promotes its services in carrying out the administrative policies established by the Congregation. Areas of responsibility and duties are many, broad and varied, but include the following:

### General

Facilitates the effective implementation of the broad policies and direction established by the Board of Directors regarding the congregation's finances, facility use, membership, dues collection and program and policy administration

Works closely with the Board of Directors and Clergy to enhance the achievement of the congregation's mission

Assists members and clergy in life-cycle events and other religious needs of the Congregation, as appropriate

Utilize appropriate techniques, concepts and resources to the end that Congregation AAAA will better serve the needs of its members, the Jewish People and the community

Foster a warm and caring environment so that the synagogue is a place where congregants and staff feel welcome, respected, nurtured and appreciated

Extend good will and understanding to all individuals who interact with the synagogue in both official and unofficial capacities and embody to everyone the principles of Judaism upon which our congregation is built

Should be encouraged and provided the opportunity for professional growth Serves as a Jewish role model within the congregation and community

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### Management, Administration and Staff Leadership

Supervise and manage all administrative activities and functions

Recruit, train, supervise and dismiss (when necessary) synagogue staff, including professional department heads, office support and building maintenance personnel

Establish personnel guidelines and policies (subject to the approval of the Personnel Committee and Board of Directors)

Allocate personnel work loads, assignments and work flow among the various staff members to ensure the timely and effective completion of work tasks

Arrange and coordinate meetings of the professional staff to discuss ongoing issues of synagogue operations and management

Constructively mediate interpersonal conflicts between members of the staff and resolve disputes as amicably as possible

Promote the professional and vocational development of the staff and ensure that their knowledge remains current

Ensure that the proper systems are implemented to handle membership data, fiscal reporting, dues collections, publications, High Holy Day arrangements, yahrzeit information, and other materials that are necessary for the smooth operation of the synagogue

Evaluate and acquire computer hardware and software for the efficient accomplishment of administrative needs and to maintain more effective communication with the congregation's members

Maintain a calendar of synagogue activities and religious services and provides for their implementation  
Provide oversight of the synagogue's buildings, grounds, cemeteries and building security needs Supervise and coordinate all activities relating to the cemeteries of the congregation

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## Lay Leadership

Provide staff support, attend and participate in Executive Committee and Board of Directors meetings (without voting rights)

Provide training opportunities for Board and leadership development Facilitate Board members' understanding of their roles and responsibilities

Serve as a resource to advise the Board, its officers and committees on various matters when such information and advice is solicited or needed

Serve as a resource to the Nominating Committee and provide input regarding the recruitment or retention of Board members

Interacts with individual members and groups of members to assist them in fulfilling their needs and desires as expressed through their affiliation with the congregation

Works to expand member involvement and develop new leadership

Assists synagogue-affiliated groups and their committees in planning and implementing their programs and policies

## Fiscal Management

Supervises financial planning and management including the preparation and oversight of the synagogue budget

Serve as central coordinating individual for staff and lay leadership in development of operating budget process and plan

Supervises and recommends all purchasing through proper committees

1. Offer administrative support and direction for fundraising projects and development activities of the congregation

2. Serve as the professional staff resource for the Budget & Finance committee and the investment trust committee

3. Provide oversight for the activities of the Office (Business) Manager in all day-to-day aspects of the synagogue's fiscal affairs including cash management, accounts receivable and payable, payroll and preparation of regular financial statements

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

## Executive Director: Job Description

**The position of the Executive Director shall require the following duties:**

- A. Execute and implement the policies of the synagogue as established by the Board of Directors and Committees.
- B. Assist committees and committee chairmen in executing their duties, when requested.
- C. Assist in the appropriation of the budget, and supervise its implementation in conjunction with the representatives on the Board of Directors.
- D. Supervise all purchasing through the proper committees and in established manners.
- E. Advise in the selection and supervision of office and maintenance personnel.
- F. Maintain an overall calendar of congregation activities and provide for its implementation including clearance of dates for all meetings, appropriation of space affiliates and outside groups in consultation with the Board of Directors when necessary.
- G. Assist wherever possible, congregation affiliated groups and their committees implementing their decisions.
- H. To be fully responsible for coordinating the working of the congregation office including the day-to-day operations.
- I. Assist wherever called upon by the President, Board of Directors, and committees with agendas, programming ideas, facts and figures, reports, and information analysis.
- J. Create all office and procedural forms necessary for the smooth operation of the office and revise said forms when necessary.
- K. Welcome new and prospective members in an attempt to integrate them into the synagogue family.
- L. Be responsible for maintenance and cleanliness of all Synagogue property and supervision of the works of the custodian.
- M. Arrange for repairs in conjunction with the House Committee.
- N. Perform a public relations function to establish cordial relations between new members, officers, membership, synagogue affiliates, and group meetings in the Synagogue.
- O. Publicize Synagogue activities in the local press.
- P. Establish and maintain archives for the preservation and care of all Synagogue records, minutes, bulleting, graphs, printings, mailings, yearbooks, etc.
- Q. To perform such other duties in the capacity of an Executive Director as may be requested by the president or vice-presidents, to attend Board of Director and Executive Board meetings and participate therein.
- R. Implement Kashruth as per established guidelines.

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## Executive Director: Job Description

1. DUTIES. During the term of this agreement, the Executive Director agrees to perform the following duties:

- (a) Implement the policies of the Board of Trustees of the Congregation.
- (b) Facilitate activities at the request of Board Members and committee chairpersons.
- (c) Manage and coordinate administrative activities, including supervising the day-to-day operations of the synagogue office, processing the payroll for synagogue employees, ensuring adequate publicity for synagogue events and activities, and maintaining all necessary synagogue records.
- (d) Assist in budget preparation and implementation. Specifically, provide input to the budget committee concerning expected expenses for board and administration, house and maintenance, and capital items; prepare the Congregation's books at the end of each month for review by the Treasurer; and notify the Treasurer of any budget item expected to significantly vary from budget.
- (e) Supervise procurement in accordance with procedures established by the Board and its committees.
- (f) Assist in fund-raising and membership campaigns.
- (g) Hire and supervise office and maintenance personnel and contractors.
- (h) Supervise the maintenance of all synagogue property.
- (i) Maintain a calendar of all synagogue activities
- (j) Maintain the financial records for the religious school and nursery school.
- (k) Assist the Congregation's financial secretary by reviewing the financial payment status of members.
- (l) Be available as a resource person to the Rabbi, Board members, and congregants.
- (m) Coordinate logistics for High Holiday services, including arrangements for rentals and space for Junior Congregation services.
- (n) Attend Board and committee meetings (as appropriate).
- (o) Perform other duties as may be requested by the congregation, President, or other officers.

2. SUPERVISION. The Executive Director will report to and be evaluated by the President of the Congregation. The President will evaluate the Executive Director's performance every 6 months, in writing.

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

## CONGREGATION ABC EXECUTIVE DIRECTOR - POSITION DESCRIPTION

### Scope of Responsibilities:

The Executive Director of ABC Congregation serves as the executive staff member of the synagogue and ministers to the needs of the congregation in matters of life cycle events, religious ceremonies and other areas of Jewish living.

He bears the ultimate responsibility for the administrative functions of the synagogue consistent with the policies established by the Executive Committee and Board of Managers through the supervision of administrative personnel.

Responsibilities include working in tandem with the clergy, coordination of life cycle events, coordination of and participation in religious services, overall management and supervision of personnel, membership recruitment and member needs, overall financial oversight, and staff support for lay and professional leadership. Bearing in mind the religious, educational, and social purposes of ABC Congregation, the Executive Director initiates activities to ensure that members' needs are met. The incumbent provides necessary support to assist the pulpit and educational staff in meeting the religious and educational needs of the Congregation.

### Organization and Reporting Relationships:

Along with the senior clergy, the Executive Director reports to the President of the Congregation and through the President to the Board of Managers. The Executive Director works closely with the Senior Rabbi and other professional staff, and takes responsibility for support of all professional programs. The incumbent receives direction from the President and Senior Rabbi of the Congregation with broad latitude for decision-making to carry out the position's responsibilities. The Executive Director supervises all personnel in areas of education and administration.

### Duties and Responsibilities

#### 1. Life Cycle Events

1.1 Plans and coordinates ABC's involvement (personnel and facilities) in all life cycle events

1.2 Leads the annual Bar/Bat Mitzvah Retreat with the Rabbi and assists Bar/Bat Mitzvah families through the Bar/Bat mitzvah experience.

1.3 Participates in the Bikur Cholim program of the synagogue advising staff and lay leadership of members or members' relatives who are ill and visiting hospitals when needed.

1.4 Arranges funeral services and advises families on Jewish funeral and bereavement practices and customs. Maintains Yahrzeit records (memorial observances) and notices

1.5 Serve as religious witness for Rabbinic Court (Bet Din) for conversions, divorce decrees, and weddings.

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## CONGREGATION ABC EXECUTIVE DIRECTOR - POSITION DESCRIPTION

### 2. Religious Services

2.1 Coordinates with clergy for all Sabbath, High Holy Day, festival, and daily services and activities

2.2 Leads religious services, Sabbath services, daily minyan, shiva minyan when needed

### 3. Management and Personnel Supervision

3.1 Supervises administrative functions of the congregation including hiring and supervising staff

3.2 Supervises benefits program (health insurance, disability insurance, life insurance, and pensions) for all personnel

3.3 Develops and interprets personnel policies for staff as required

3.4 Serves as an ex-officio member of the Personnel Committee along with the Senior Rabbi

### 4. Membership Recruitment and Member Needs

4.1 Serves as a staff contact and outreach for new members in the community

4.1 Works with families with financial need for waivers and scholarships.

4.3 Assists and counsels member families with synagogue, community, or personal needs

### 5. Kashrut

5.1 Supervises, as assigned by the senior rabbi, the kashrut of the kitchens and events

5.2 Supervises administrative personnel responsible for internal facility usage, life-cycle celebrations, and community events

### 6. Funerals, Bereavement, and Cemetery

6.1 Supervises the ABC Cemetery to ensure burials are conducted according to Jewish law and synagogue policies

6.2 Serves as initial, primary contact when death occurs in congregation, ensure adherence to Conservative and synagogue religious practices, assist family, coordinates with clergy and funeral home

6.3 Coordinate and conduct Shiva minyanim (services at houses of mourning) as required



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## CONGREGATION ABC

### EXECUTIVE DIRECTOR - POSITION DESCRIPTION

#### 7. Staff Support for Lay and Professional Leadership

7.1 Ensures staff support for the President, Officers, Board of Managers, and lay leadership

7.2 Identifies issues, frames alternatives, and follows up in areas of responsibilities through working with synagogue lay leaders and clergy

7.3 Functions as a member of the professional staff to ensure that their needs are met

#### 8. Financial Management

8.1 Identifies current and long-range financial needs and proposes responsive financial plans

8.2 Develops draft budget in conjunction with lay leadership

8.3 Supervises bookkeeping personnel and accounting activities

#### 9. Development and Outreach

9.1 Develops fund raising programs in conjunction with the clergy and appropriate lay leaders

9.2 Oversees public relations and marketing activities in conjunction with pulpit and lay leadership including the congregation's regular publications.

#### 10. Building and Grounds

11.1 Supervises synagogue administrator who has responsibility for maintenance of physical plant, preventive maintenance, and maintenance personnel

11.2 Oversees purchases of major equipment, refurbishments, and repairs

#### 11. On-Call Responsibilities

11.1 Maintains 24 hour availability, including deaths, coverage of congregational religious services, and emergencies along with the Senior Rabbi.

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## EXECUTIVE DIRECTOR - JOB DESCRIPTION

1. Duties: The Executive Director shall be the principal administrator of the business affairs of the Congregation and as such he shall:

A. Implement the policies of the Congregation established by the Executive Committee and/or the Board of Directors and, in connection therewith, regularly attend meetings of the Executive Committee, the Board of Directors, and the Congregation. He shall also assist the Officers, Committee and affiliated organizations of the Congregation in carrying out their duties and activities.

B. Hire, train, evaluate, and, if necessary, discharge clerical and custodial personnel. He shall negotiate their salaries and benefits within the guidelines established by the Personnel Committee and the Board of Directors. He may also arrange for extra personnel as required during peak periods.

C. Manage the fiscal affairs of the Congregation, including:

I. Ensuring the timely billing and collection of all fees as established by the Board of Directors.

II. Maintaining proper financial records of the Congregation under the direction of outside accountants.

III. Maintaining all accounts of the Congregation under the direction of the Budget and Finance Committee.

IV. Assisting in the preparation and presentation of the annual budget And rendering budget reports to the Board of Directors and to Committee chairs.

V. Overseeing the Bookkeeper to ensure an accurate accounting of funds received.

VI. Approving the final requisition and order payment of all obligations of the Congregation. Deal with vendors whose statements are in question to affect an equitable settlement.

VII. Handling all stock and bond transactions for the Congregation under the direction of the Treasurer, Endowment Trustees, or other designated individuals or committees.

VIII. Dealing directly and confidentially with members or prospective members who find the established fees beyond their financial means. He shall be aware that it is the purpose of the Congregation to make membership affordable to all.

IX. Working directly on fund raising efforts of the Congregation in conjunction with Congregation and Committees in areas of program, dedication, endowment, etc., including the Kol Nidre Phonathon, etc.

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D. Maintain the physical plant and equipment in clean and working order. He shall also maintain a safe environment for those who use the facilities daily and/or occasionally. In conjunction with the House Committee, he shall determine those items that need repair and/or replacement, secure bids and affect the repair and/or replacement within the guidelines of the annual budget. He shall also secure best price contracts from outside contractors to provide goods or services necessary for the operation of the building and its equipment. He shall also identify those items or areas that need upgrading and present these to the House Committee. Finally, he shall work directly with committees, architects, engineers, contractors, and subcontractors when physical changes or refurbishment of the physical plant are under construction and/or being undertaken.

E. Maximize the usage of Congregation facilities by encouraging members to hold b'nai mitzvot, weddings, and other life cycle events at Congregation ABC. He shall encourage non-members and community organizations, where appropriate, to hold their meetings and functions at Congregation ABC . He shall also ensure that the arranged for room(s) are assigned and properly set up.

F. Encourage prospective members to join the Congregation and become Integrated into the Congregational family and help in retention activities directed to present members. In coordination with Congregational Committee Chairs, he shall assist in providing proper notice to the membership and community at large of programs being held in or sponsored by the Congregation. This includes, but is not limited to, the monthly bulletin, mid-month mailings, press releases, invitations, etc.

G. Assist the Program/Youth Director in all aspects of planning for the family and youth programs, particularly as this relates to building usage and publicity. He shall work with the Rabbi and Cantor on matters pertaining to religious services. He shall also work with the Nursery School Director and Consolidated Religious School Director on programmatic matters and those matter related to building usage.

H. Maintain a schedule of all services, functions, and activities of the Congregation, Board of Directors, Executive Committees, Affiliated organizations and other groups involving the use of the Congregation's facilities.

I. Perform all duties not already specified to be included in (Insert Name Here)'s memorandum of (Insert Date Here) (see addendum).

J. Carry out other duties as are customary for a Synagogue Administrator of a Congregation affiliated with the United Synagogue of Conservative Judaism.

K. Prepare a policy and procedure manual covering each of the activities listed in a. through j. hereof and covering any other activities and responsibilities of a synagogue director, including but not limited to those itemized in the Memorandum dated ( Insert Date Here ) attached hereto as an exhibit. The Executive Director shall prepare these manuals in a timely fashion and shall complete the same by the end of the second year of his employment hereunder. The Executive Director shall prepare drafts of these manuals in a timely and orderly fashion so that he may give progress reports to the Executive Committee of the Congregation from time to time throughout said two year period. The Executive Committee shall designate a representative to act as its liaison to work directly with the Executive Director to facilitate communication between the Executive Committee and the Executive Director and to give oversight and assistance to the Executive Director as appropriate.

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

EXHIBIT A CONGREGATION  
(the "Congregation")

Job Title: Executive Director

Responsible to: President, Board of Trustees

Date Revised: April 1996 DEFINITION:

A CAPABLE INDIVIDUAL WHO SERVES AS EXECUTIVE DIRECTOR TO CARRY OUT THE OBJECTIVES AS SET FORTH BY THE BOARD OF TRUSTEES AND ITS PRESIDENT. THE EXECUTIVE MAINTAINS AN ACTIVE LEADERSHIP ROLE IN COMMUNITY AFFAIRS RELATED TO THE POSITION AND WORKS TO ENHANCE RELATIONSHIPS BETWEEN THE CONGREGATION AND VARIOUS PUBLIC AND PRIVATE AGENCIES BOTH LOCAL AND NATIONAL. RECOMMENDS AND DEVELOPS POLICIES AND PROCEDURES FOR THE ORGANIZATION. PERFORMS RELATED ADMINISTRATIVE AND SUPERVISORY DUTIES.

## JOB DUTIES:

1. Serves as the executive director of the Congregation, supervising the operations of the various operating divisions. Must agree to attend the Congregation's Board of Trustees meetings, Executive Committee meetings, and meetings of standing and ad hoc committees, as well as meetings of related or umbrella agencies as required and attend and represent the Congregation at community-wide events involving both the Jewish community and the community-at-large.
2. Reviews and evaluates existing programs and policies and initiates change as appropriate. Conveys to the Board of Trustees issues requiring policy formation.
3. Interprets and transmits policies of the Board of Trustees to personnel and insures compliance with them.
4. Meets with administrative staff to coordinate their activities and formulate programs.
5. Prepares and submits an annual budget. Provides periodic reports to the Board of Trustees concerning various phases of the Congregation's operations and its financial condition.
6. Establishes organization lines of authority and fixes areas of responsibility.
7. Recommends personnel policies including salary scales, hours of work, benefits, etc.
8. Represents the Congregation in meetings of professional groups if requested.
9. Promotes favorable image of Congregation and its services to the community.
10. Delegates specific operating responsibilities and insures that they are being carried out.
11. Works with the Congregation and coordinates fundraising activities.

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12. Responsible for total services provided by the Congregation, to the extent within the purview of and consistent with the position of executive director.

13. Responsible for hiring and terminating Congregation staff in consultation with the Personnel Committee of the Congregation and, in the event no such committee is then designated, with the Executive Committee.

## **JOB REQUIREMENTS - PERSONAL QUALIFICATIONS:**

### **1. Responsibility**

Responsible for the total optimal welfare of those served by the Congregation. Carries out programs within policies and by general direction of the Board of Trustees.

### **2. Knowledge**

Must have a thorough knowledge of the modern principles and practices of administration of large religious congregations. Must understand the concepts provided by the Congregation and related or affiliated entities. Must have a working knowledge of business and personnel administration.

### **3. Skills**

Must be skilled in principles of administration and public relations. Must be able to plan, analyze, direct and coordinate all management functions of an institutional program. Must be skilled in both written and verbal communications. Must be able to exercise initiative and judgment in interpreting and applying policies and regulations.

### **4. Mental Application**

Must be observant, flexible and innovative. Must enjoy working with people and be able to establish and maintain effective working relationships with others.

### **5. Experience**

At least five years relevant experience at the assistant, associate or executive director level of a synagogue.

### **6. Education**

Bachelor's degree from an accredited college or university. Master's degree in business administration or other appropriate field.

### **7. Physical Demands**

Good physical and mental health. Must be able to work under constant pressure.

### **8. Worker Characteristics**

Must be able to cope with defeat and success in contacts with people. Must be emotionally stable and be able to act clearly under pressure. Must be well-groomed and poised at all times.

Approved:  
President  
Board of Trustees

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

## CONGREGATION ABC EXECUTIVE DIRECTOR - POSITION DESCRIPTION

### Scope of Responsibilities

The Executive Director is the Chief Administrative Officer of Congregation ABC and ministers to the needs of the congregation in matters of life cycle events, religious ceremonies and other areas of Jewish living. He bears the responsibility for the administrative functions of the synagogue consistent with the policies established by the Officers and Board of Trustees. These functions include working with the clergy, coordination of life cycle events, coordination of and participation in religious services as required, office management and supervision of office personnel, membership recruitment and retention, billing and collection, facility usage, and staff support for lay and professional leadership. Bearing in mind the religious, educational, and social purposes of Congregation ABC, the Executive Director is responsive to members to ensure that their needs are met whenever possible. The incumbent provides necessary support to assist the pulpit and educational staff in meeting the religious and educational needs of the Congregation.

### Organization and Reporting Relationships

The Executive Director reports to the President of the Congregation and through the President to the Board of Trustees. The Executive Director works closely with the Senior Rabbi and other professional staff, and takes responsibility for support of all professional programs. The incumbent receives direction from the President of the Congregation with broad latitude for decision-making to carry out the position's responsibilities. The Executive Director assists the Officers, Board of Trustees, committees, and affiliates in the development and implementation of policies of the Congregation within the incumbent's scope of responsibilities. The Executive Director supervises all non-clergy personnel in areas of administration, financial management, and facility usage.

### Duties and Responsibilities

#### 1. Life Cycle Events

- 1.1 Plans and coordinates ABC involvement (personnel and facilities) in all life cycle events
- 1.2 Participates in the annual Bar/Bat Mitzvah Parents Meeting with the Rabbi and explains and assists Bar/Bat Mitzvah families in customary synagogue obligations, i.e. Kiddush, flowers, rooms usage, contributions, etc.
- 1.3 Maintains Yahrzeit records (memorial plaques) and supervises mailing of Yahrzeit(memorial) notices
- 1.4 Serve as religious witness for Rabbinic Court (Bet Din) for conversions, divorce decrees, and weddings when asked.

#### 2. Religious Services

- 2.1 Coordinates with clergy for all Sabbath, High Holidays, festival, and daily services and activities
- 2.2 In conjunction with the clergy, maintains adequate inventory of religious supplies, prayer books, talitot, kipot, wine, etc.
- 2.3 Coordinates distribution of High Holiday tickets
- 2.4 Coordinates the High Holiday Appeal
- 2.5 Leads religious services, daily minyan, shiva minyan when needed

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## 3. Office Management and Personnel Supervision

- 3.1 Manages office, including hiring and supervising support staff
- 3.2 Makes daily assignments to staff associated with carrying out the other functions of the Executive Director
- 3.3 Supervises and hires custodial and accounting staff, which constitute the staff associated with carrying out the functions of the Executive Director
- 3.4 Manages benefits program (health insurance, disability insurance, life insurance, and pensions), including analysis of benefits programs, knowledge of benefits laws, and negotiation of benefits contracts
- 3.5 Ensures proper maintenance of personnel records
- 3.6 Develops and interprets personnel policies for staff as required
- 3.7 Serves as an ex-officio member of the Personnel Committee

## 4. Membership Recruitment and Retention

- 4.1 Serves as a staff contact with potential new members
- 4.2 Works with Membership Committee to recruit and retain members
- 4.3 Advises appropriate professional staff or lay leaders of specific membership problems for which they may provide assistance
- 4.4 Reports new members and resignations to the Board for approval
- 4.5 Waives fees within established guidelines

## 5. Facility Usage

- 5.1 Oversees the use of facilities by outside caterers, vendors, and others
- 5.2 Schedules location of activities to ensure best usage of facilities and appropriate location based on nature of activity
- 5.3 Provides information on availability of and charges for facilities to members and non members seeking locations for events
- 5.4 Serves as primary contact and liaison with users of facilities, including entering into the usage agreement, ensuring availability of necessary staff, and supervising use of facilities

## 6. Staff Support for Lay and Professional Leadership

- 6.1 Ensures staff support for the President, Officers, Board of Trustees, committees and affiliates providing such support personally in areas of expertise
- 6.2 Identifies issues, frames alternatives, and follows up in areas of responsibilities through the committee system
- 6.3 Functions as a member of the professional staff, providing support to the Senior Rabbi and other professional leadership to ensure that their needs are met within the Executive Director's area of responsibility

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## 7. Financial Planning

- 7.1 Identifies current and long-range financial needs and proposes responsive financial plans
- 7.2 Develops draft budget in conjunction with lay leadership
- 7.3 Recommends fiscal policies and develops controls
- 7.4 Analyzes and interprets financial data
- 7.5 Manages insurance program (building, liability, and property insurance), including assessment of insurance needs and negotiation of insurance contracts

## 8. Financial Management

- 8.1 Assures adherence to budget
- 8.2 Establishes purchasing controls
- 8.3 Supervises cash and check disbursement
- 8.4 Ensures proper financial record-keeping
- 8.5 Supervises billing of membership dues, pledged contributions and facilities fees
- 8.6 Follows up delinquent accounts
- 8.7 Prepares necessary schedules and other information for auditors' reports and works with auditors to develop management recommendations

## 9. Development and Outreach

- 9.1 Develops fund raising programs in conjunction with appropriate officers, committees, and auxiliaries
- 9.2 Implements approved fund raising activities
- 9.3 Coordinates public relations and marketing activities in conjunction with pulpit and lay leadership
- 9.4 Participates in the production of the Forum

## 10. Building and Grounds

- 10.1 Manages maintenance of physical plant, including general knowledge of systems
- 10.2 Schedules preventive maintenance, repair and replacement of plant and equipment
- 10.3 Recommends appropriate service contracts
- 10.4 Oversees purchases of equipment and supplies

## 11. Strategic Planning

- 11.1 Establishes a program for acquisition of demographic information of the membership and other information necessary to planning
- 11.2 Plans and implements information systems, including computer systems
- 11.3 Brings to officers' and Board's attention anticipated future needs of the synagogue, including identifying problems and potential solutions



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

## CONGREGATION ABC EXECUTIVE DIRECTOR JOB DESCRIPTION

### The Congregation

Congregation ABC is a full-service egalitarian synagogue in City, State, operating under the umbrella of the United Synagogue of Conservative Judaism. With nearly 100 years of history and 600 families, ABC is the largest and most respected Conservative congregation in the Greater CityName vicinity. Along with a complete schedule of religious services, ABC maintains an active Sisterhood, Men's Club and Adult Education committee to spearhead the involvement of its adult members. For young families with children, ABC offers a Talmud Torah for grades K through 8 which has been cited as being a School of Excellence, Family Education services and programs (such as Tot Shabbat and Havdalah) and active Kadima and USY chapters. For very young children, ABC offers the only local synagogue nursery school accredited by NAEYC, with daily classes for two, three and four year olds as well as enrichment and Mommy & Me programs and a summer camp. In addition, ABC regularly schedules musical programs, well-known outside speakers, Social Action activities, discussion groups, and a variety of other social and educational opportunities for adults and seniors.

### The Executive Director

At the heart of ABC sits an experienced and collaborative clergy, executive board and administrative staff that together have developed ABC into a true community for its active members. Due to the impending retirement of its current Executive Director, ABC must now engage a new operational leader. The successful candidate will have an opportunity to make a very important and lasting impact on the synagogue and the Greater Bridgeport community.

### Executive Director Responsibilities

The Executive Director reports directly to the President of ABC's Executive Board. The Executive Director's areas of responsibility and specific functions include:

#### Congregational:

- Serving as chief point of contact for members' needs, questions, concerns and complaints (excluding issues that the province of the clergy);
- Developing and executing on membership recruitment strategies serving as a vital component of the Membership Committee, including serving as the primary point of contact (with the rabbi) for potential members' inquiries; and
- Identifying, encouraging and developing congregants who can make transition to a greater level of participation and leadership.

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## **Synagogue Leadership:**

- Attending and participating in all Executive Committee, Board of Trustees', and appropriate committee meetings;
- Serving as "eyes and ears" for and advisor to president of the congregation;
- Assisting all lay committees, including enabling lay volunteers to achieve their respective committees' goals;
- Facilitating clergy's needs when appropriate; and
- Coordinating actions of professional staff (clergy, educational, etc.) when appropriate.

## **Financial:**

- Holding complete accountability for the synagogue budget in tandem with the office bookkeeper. Must work closely with the executive board, clergy and committee chairs concerning budget;
- Managing day-to-day expenditures;
- Leading the bid process from outside vendors when acquiring special services for the synagogue;
- Serving as the point person for supervising audit/review by outside CPA firm; and
- Driving fundraising projects, in conjunction with president, Fundraising Committee and applicable committee chairpersons.

## **Administrative:**

- Leading a staff of 6 employees in the synagogue office and maintenance department;
- Serving as the primary synagogue representative for all points of inquiry (other than those relating to the clergy, Talmud Torah and Nursery School), including other synagogues, local Jewish Agencies, newspapers and the local community;
- Marketing and promoting the synagogue, including publication of the monthly Bulletin;
- Expediting and troubleshooting administrative strategies when appropriate; and
- Maintaining the synagogue calendar and coordinate with the local Jewish Community Calendar.

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### Facility Management:

- Supervising the maintenance staff and holding accountability (with the House Committee) for all building maintenance issues;
- Serving as the primary point of contact for booking of synagogue functions and coordinate with service providers to secure that functions run smoothly; and
- Holding accountability (with the House Committee) for building and parking lot security and maintenance.

The nature of the Executive Director position and the priorities given to different functions are expected to evolve over time based on the Congregation's needs and the Executive Director's particular talents and interests.

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## Executive Director

Congregation ABC is a trendsetting Conservative synagogue known for its pioneering programming, its educational resources for all ages, and its religious leaders. Congregation ABC is recognized as one of the leading Jewish institutions in America.

Congregation ABC is a synagogue community committed to the quest for a Jewish life that is Godly, meaningful, and purposeful. We pursue that mission as we transform lives through:

Torah - Jewish Learning

Avodah - Jewish Worship, Celebration, and Commemoration Gemilut Hasadim - Ethical Action and Social Justice

Havurah - Jewish Fellowship, Community, and Belonging Keruv - Reaching Out

Tzedakah - Jewish Giving

These basic principles sustain our synagogue as a participatory, activist, inclusive community whose members feel connected to one another, to their Jewish past, to the Jewish future, and to their fellow Jews in Israel and throughout the world. ABC proudly generates new ideas that influence the NameOfCity and national Jewish communities. Due to the impending retirement of our current and esteemed Executive Director, we are seeking an equally distinguished individual for our organization.

## THE ROLE OF THE EXECUTIVE DIRECTOR

### Overview

The Executive Director is responsible for the efficient planning, organization, direction and control of the administration of the synagogue. The Executive Director works to meet the objectives related to ABC's mission, and its strategic plan. Specifically, under the administrative activities related to finances, staffing and personnel operations, and activities that serve to support effective business operations. The individual uses considerable independent judgment in decisions that influence operations, advises and assists the Board of Directors in planning, policy, and operational matters. The Executive Director is responsible to the Executive Committee and the Board of Directors of ABC and works with, and at the direction of the President of the Congregation and other appropriate officers. The Executive Director also works with the Rabbis and other professional staff of ABC to further common goals.

### Authority

The Executive Director is empowered with the authority, responsibility, and ultimately accountability to develop, manage, and coordinate the operation of the synagogue. The Executive Director is to assist in the design of, and participate in the development and implementation of, goals, objectives, policies and procedures; ensure the proper coordination of all departments; prepare and submit to the Executive Committee and, where appropriate, the Board of Directors reports of finances, staffing, other administrative activities; and attend and participate in Executive Committee, Board of Director and other meetings to receive general direction and to provide input. Within the scope and charge of this position, the Executive Director is responsible for eight (8) key areas of operation:

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**1) Personnel Management** – the Executive Director will hire, provide for training, supervise and evaluate all administrative and maintenance staff, save the faculties of the congregation's schools. The Executive Director will develop a staff team with clear job descriptions, and recommend appropriate roles and compensation for members of that team.

**2) Financial Management** – the Executive Director will make certain that the congregation's financial systems are well-managed, that financial policies regarding dues, fees, and fund raising are implemented along board-approved guidelines, and that financial practices conform with legal requirements. The Executive Director will provide to the Executive Committee and, where appropriate, the Board regular financial information and suggestions for improving systems and income streams.

**3) Communications/Public Relations** – the Executive Director will carry out the congregation's communication strategy, utilizing the resources of staff and lay leaders.

**4) Facilities Management** – the Executive Director will supervise the use of the congregation's facilities in line with Board-approved guidelines. The Executive Director will see to it that there is appropriate maintenance and custodial personnel. The Executive Director is also responsible for maintaining the security of the synagogue. The Executive Director will also supervise the maintenance of the IT infrastructure. The Executive Director is the congregation's primary contact and interface to the Caterer and is responsible for the proper implementation of the Caterer's contract.

**5) Program Support** – the Executive Director will work with the clergy and program staff to support their efforts and make them aware of potential problems of space, staff availability and issues of liability.

**6) Governance** – the Executive Director will attend all Board and Executive Committee meetings and provide for appropriate notification, information and record keeping, to optimize the effectiveness of congregational governance. The Executive Director will attend committee meetings relevant to these responsibilities and offer suggestions at the committee, Executive Committee and Board levels.

**7) Strategic Planning** – the Executive Director will be a key member of any strategic planning for the congregation and will be expected to provide strong recommendations for improving all areas of congregational life. The Executive Director will staff any strategic planning group

**8) Development** – the Executive Director will assist in any financial development program where the Executive Director's knowledge of the congregation and its members may be useful.

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The ABC Congregation (ABC) seeks an Executive Director. The ABC is a USCJ-affiliated synagogue of nearly 300 families (and growing!) whose mission is to create and sustain vibrant Jewish life in the VVVV area of Statenname. We strive to fulfill this mission through Jewish education for all ages, celebration of holidays and family events, Jewish cultural programs, community service projects, and care and support for those who are ill or struggling. We are looking for someone to fill this newly created leadership position and become part of the team -- together with the Rabbi, Cantor, Educator, and Administrative Assistant -- that will continue to grow and strengthen our Jewish community.

### Qualities:

These characteristics describe our ideal candidate.

Emotional intelligence, a people-person: as a religious community, we seek someone who values relationships above all

Entrepreneurial spirit, proactive initiative-taking  
Openness to new ideas and to learning new skills  
Sense of humor

### Experience and Skills:

The ideal candidate will possess the following skills and experience.

- Organized with the ability to organize others Fundraising/development
- Leadership and management ability
- Clear, professional, and persuasive writing Financial acumen
- Computer literacy: Excel, Word, Powerpoint, Google Docs, Database management

### Responsibilities:

Precise scope and focus of ED responsibilities subject to revision by the right candidate, in collaboration with Administrative Assistant, Clergy, and Board

### Development & Membership Engagement

- Create development and fundraising strategy; manage Development Committee
- Database management: coordinate with bookkeeping to enter membership and donation information; maintain updated contact and family information records
- Member relations: member in-take; membership forms and queries; referrals to appropriate clergy, Board member, or committee chair
- Supervise mailings: oversee mail merge, labels, envelope stuffing, postage; manage Administrative Assistant's involvement

### Marketing

- Oversee PR and marketing strategy, including advertising, media relations, and all published synagogue materials (brochures, newsletters, etc.)
- Supervise graphic designer
- Website: oversee volunteer or contract webmaster; working with board and clergy to ensure website reflects congregational vision and mission

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## Board Relations

- Responsibility for strategic planning and implementation in cooperation with Board
- Create Board mtg agendas in collaboration with clergy and Board president
- Coordinate committee reports

## Office Management

- Supervise Administrative Assistant
- Lead weekly staff meeting
- Oversee synagogue's master calendar and coordination with chapel staff
- Office, building, and equipment maintenance:
- Oversee purchasing of supplies
- Oversee IT (working with computer, networking, copier companies)

## Clergy Support

- Maintain ongoing list of pastoral needs; keep clergy informed of changes
- Assist in scheduling b'nei mitzvah tutoring and family meetings
- Coordinate with yahrtzeit volunteer to ensure dates are communicated properly to families
- Attend most Shabbat services and all major events/programs in first year; afterward
- TBD with Executive Committee and clergy

Competitive compensation, commensurate with experience.

Please submit application and inquiries to XXXX@XXXX