

FIRST EDITION

JEWISH COMMUNAL LEADERSHIP AND CONGREGATIONAL GOVERNANCE

A Resource Manual for
Training and Developing
Effective Boards and Committees



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Rabbi Shawn Israel Zevit
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Introduction

Rabbi Shawn Israel Zevit, Rabbi Elyse Wechterman, Shira Stutman

Why a board manual?

Most people join synagogues to find a spiritual home, to educate themselves and their families, and/or to participate in community, not to serve on their boards. Through pursuing such religious, educational or communal activities, however, people may deepen their commitment to the congregation and decide to contribute through leadership roles.

It is the holy work of the board to keep alive the vision of a sacred community. Certainly, board members are responsible for policy, planning, financial resources, senior staff supervision, and programming based on the congregation's mission. However, serving on the board is also an important opportunity to receive; it should provide opportunities for spiritual growth and leadership training.

Participation in synagogue life does not by definition guarantee the skills and knowledge necessary to be an effective board member. Even those with backgrounds in organizational development, management, financial oversight, or administration may not be able to easily adapt those skills to the synagogue arena. Additionally, the effectiveness of any group, such as a board, depends not only on the effectiveness of each individual, but also upon the effectiveness of the system, the patterns of interaction, and the cooperative abilities and role-comprehension of the entire group.

Every person brings inherent and learned gifts to their leadership role in a community. There is, however, a specific set of skills and values that are unique to serving in a faith-based community. Hence, all new boards, even those made up of individuals who have previously served in congregational leadership, or in leadership roles outside their congregation, need training and orientation to do their work effectively. All boards are new each time they are elected—even if only one member changes. This dynamic exists in committee structures, as well. This manual contains resources, tools, and insights from Jewish life and the world at large that can help in developing and maintaining effective leadership across the congregational system.

How do I use this manual?

The goal of this manual is to assist congregations and havurot in times of transition and in ongoing governance. It is aimed at helping board and committee members learn about their jobs, clarify expectations, and begin to build a working team. Board and committee training and orientations can take place over several short meetings, as an extended weekend or as a one-day retreat.

The goals of a board or committee orientation or training may be any number of the following:

- To create a cooperative environment in which the group will do its work;
- To provide an understanding of the overall functioning of the community and its programs;
- To identify lines of communication and authority for board members and committees;
- To define roles and responsibilities;
- To ground the work of the group in the sacred mission of the community;
- To set year-long goals for the congregation, board and/or committees;
- To review processes, procedures, and policies;
- To clarify the respective roles of volunteers and staff;
- To ask questions; and
- To deepen the Jewish knowledge, personal relationships, and spiritual life of the leadership.

It is important that the purpose and goals of the board and related committees be clarified and communicated to all participants in advance of a training or orientation.

Of course, no board is identical to any other. The board or committee orientation and training must reflect the mission, goals, personality and structures of the particular community. Additionally, not every new board will have the luxury of having a large amount of time for members to get to know each other and to set parameters for their new board. As such, we encourage facilitators to read through the entire manual and pick and choose the sections that are most important for their own needs. Additionally or alternatively, parts of the manual may be used at different times to meet congregations' specific needs.

There are five appendices to the guide. In the first is an article entitled "Synagogue Governance as a Sacred Trust". We encourage all board members to read this article when they accept a position on the board. The second appendix

includes a variety of actual synagogue board training agendas, which run the range from an afternoon to a one-day session. The third appendix is titled “Sanctifying the Sacred Trust: A Reconstructionist Guide to Board Installation Ceremonies”, and includes a board initiation and appreciation ceremony, which celebrates board members as they transition on or off the board. The fourth appendix, entitled “Next Steps”, includes feedback from “A Sacred Trust” workshops. The fifth and final appendix, taken from the “Sacred Trust” manual, contains additional resources.

B'hatzlachah! (Good luck!)—May all your board and committee transitions be easy and meaningful.

Here is a suggested blessing for any leadership activity:

בְּרוּךְ אַתָּה יְיָ אֱלֹהֵינוּ מֶלֶךְ הָעוֹלָם, אֲשֶׁר קִדְּשָׁנוּ בְּמִצְוֹתָיו,
וְצִנָּנוּ לְעֶסֶק בְּצָרְכֵי צִיבּוֹר.

Baruch atah Adonai, Eloheynu melech ha-olam, asher kideshanu b'mitzvotav,
v'tzivanu, la'a'sok b'tzorchei tzibur.

(Developed by Rabbi Jeremy Schwartz)

Blessed are you God Creator of the Universe, Source of Holiness in our actions,
when we engage in the needs of the community.

(Interpretative translation, Rabbi Shawn Israel Zevit)

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Chapter One: Welcoming

Rabbi Elyse Wechterman and Rabbi Shawn Israel Zevit

As the new board comes together for the first time, take the opportunity to ground yourself in Jewish values, to structure your time together, to review your goals, and to set the stage for the work ahead. Here are some general pointers for creating a cooperative atmosphere:

Creating a Cooperative Atmosphere: General Pointers

Remember that we are doing holy and spiritual work as part of the Jewish people.

- Prepare and develop all relationships and materials ahead of time.
- Make sure that the environment in which the meeting will take place is comfortable and prepared, with chairs, tables, flipcharts, necessary materials, good lighting, etc.
- Frame the session at the beginning, outline goals and content.
- Keep your eye on group dynamics, verbal and non-verbal communication, who sits where and why, who participates, who needs encouragement, who dominates, who resists, who is enthusiastic, who leads naturally regardless of role, who needs encouragement, etc.
- Support individual differences in your community, validate them and help participants in conflict to see their shared values-set.
- Be open to shuffling schedules, be flexible, listen carefully if the agenda needs to change. Go creatively with what's happening in the room.
- Give board members the opportunity to brainstorm, solve problems together, and build relationships. Facilitate the members as they do the problem-solving themselves. Don't just tell them what works (even if you know!).
- Give board members feedback about their strengths, as well as other observations about their capabilities.
- Invite different members to describe what they do in the congregation.
- Prepare the ground for the board training by making sure that potential board members know the following:
 - How long are board meetings?
 - How do committees function?
 - What is the role of the executive committee?
 - How are board meetings set up?
 - How are decisions made?
- Make sure all new board members have spoken to the rabbi, the congregational president, and one other board member, to ensure that they understand the responsibility they are accepting.

Board Orientation Materials

You can shorten the learning curve and make newcomers to your board feel involved more quickly by giving new directors an orientation packet before they come to their first board meeting.

Here are suggestions for materials that should be included:

- **Articles of incorporation and bylaws:** Every director needs to know the rules.
- **Statement of board member duties and responsibilities (if you have them):** You can't expect directors to carry out their duties if they don't know what they are.
- **Program descriptions:** Give your directors the necessary information for talking about your organization. Try to develop short paragraph descriptions of each program so they can pass the "elevator test": How would you describe your organization and its programs to a fellow elevator passenger as you travel between floors? Also, any printed program brochures should be added.
- **Annual report:** If applicable, include it in the packet.
- **Budgets:** Be sure to include financial information, including the projected budget for the current year and the latest audit.
- **Schedule of board meeting dates:** If you're really organized, you will schedule a full year of board meetings at the beginning of the year. (Some communities find it helpful to have a board meeting on a regularly scheduled date, e.g., the second Monday of every month.) At the very least, have a list of proposed meeting dates that can be approved at the board orientation or the first board meeting. This allows directors to add the dates to their calendars and, it is hoped, increases attendance. Add other important dates, also, such as those of your annual meeting and special events.
- **Contextual information:** Place your programs in context by giving background information. This might include clips of newspaper or magazine articles about the general area your nonprofit serves.
- **Recent board minutes:** Give your new members a running start on the business of your organization by sharing copies of recent minutes. Minutes from the last three meetings should do it.

Of course, make sure to update returning board members' notebooks with any newly developed materials. Be sure to use a three-hole punch before sending out new materials.

The National Center for Nonprofit Boards sells a set of materials that can be used to orient new board members. Especially recommended is *The Ten Basic Responsibilities of Nonprofit Boards*.

For more information on how to understand these documents, refer to chapter ten, “Documents.”

Board Training Day

Begin by reconnecting to each other and the sacred mission of one’s community by reflecting on why you have gathered. Many lay leaders come to a board orientation frustrated with what they see as an inefficient board process or an ineffectual structure. Board orientations and training are often viewed as “cures” for a perceived “problems.” It is important that the board members be reminded of their own and the community’s successes. All boards can be improved, but the fact that the congregation has been and continues to function is valuable.

Some options:

- Post somewhere in the room a list of the orientation’s goals.
- Invite a senior member or the rabbi to review briefly the congregation’s history.
- Identify recent congregational accomplishments.
- Create a list of community values.
- Have people identify what they value about their congregation, and an area of pride they experience in their leadership role or activity.

Additionally, there are several ways that a board’s work can be grounded in the sacred mission of community:

- Begin with a blessing for engaging in the needs of the community.
- Have the rabbi or a lay-leader offer an appropriate *d’var Torah*.
- Start with *tefillot* (prayer).

Chapter Two: Introductions

Rabbi Elyse Wechterman and Shira Stutman

In any board or committee retreat, training, or orientation, there must be ample opportunity for group members to get to know each other in the context of their new roles and responsibilities. Having a foundation of good relationships will be vital as you get down to the business of leading the congregation, with its unavoidable personality and administrative conflicts.

Below are a few different examples of some questions you can pose to participants. If you are having a one- or two-day orientation, we encourage you to intersperse a variety of get-to-know-you-type activities throughout the program. (Different people will be more available to share at different points in the process.)

- **What brought you here?**
What was the journey, Jewish and/or otherwise, that brought board or committee members to this table? Allow five to ten minutes, depending on the number present, to talk about the path that brought them to be on the board. We mean this not only in a literal sense (i.e., “Sarah asked me to be on the board, and at first I demurred, but then I agreed...”) but also in a more autobiographical sense.
- **What are your strengths?**
Have group members take turns exploring the following statement: “The roles and responsibility areas in which I have the most to offer the congregation are...” Encourage them to name at least three areas.
- **In what aspect of your work do you most experience holiness?**
Go around in a circle and discuss. Group members can define the word “work” in any way they please.
- **What do you get out of being a leader?**
Have group members talk about their approach to leadership, what they gain or hope to gain from it.
- **What do you value about this congregation?**
This introductory activity will help board or committee members better understand both each other and the factors that bring people to the congregation. This topic is also useful after the completion of tough conversations about the congregation, when a little “pick-me-up”.

Have group members remind each other why they joined the community in the first place.

- **What is one thing we don't already know about you?**
This relationship building activity asks participants to offer one thing about themselves that they are pretty sure no one in the group knows.

At some point during the meeting, have participants answer the questions in the following values-clarification exercise:

What are the three to five current key measures of success of the congregation?
How do you measure how well the congregation is doing right now?

In your estimation, how has the congregation been doing in the last few years with regard to each of these measures?

What are three key areas in which the congregation will have to excel in order to succeed in the future with regard to the following?

- Services/programs/benefits offered to members
- Operating/governing practices
- Use of financial, human and physical resources
- Other factors

What are the widely shared key values within the congregation in each of the following areas?

- Religious services
- Board governance
- Operating practices
- Money and financial resources
- Role of the rabbi
- Education
- Sense of community
- The larger world

Chapter Three: Traditional Jewish Text Study

Rabbi Shawn Israel Zevit and Rabbi Yohanna Kinberg

Understanding Judaism as the “evolving religious civilization of the Jewish people” (Mordecai Kaplan, 1934) means recognizing that all aspects of Jewish communal life exist within the realm of the sacred—including, for example, decisions about marketing and publicity, budgeting, and setting dues schedules. Our choices hold the potential to reflect the individual commitments and the collective covenant of a community informed by Jewish teachings and values.

This section follows a Reconstructionist model of studying Jewish sources, including texts from biblical times to the present, compiled in order to deepen our understanding of a given issue. From this blend of traditional and contemporary sources, we can use our history as one guide to making communal decisions.

In order to develop values-based policies and procedures, we must first clarify our terms, examine our preexisting attitudes, and determine how experiences with communal leadership and governance ought to influence our perspectives. Each board or committee should be clear about the values and principles that will guide them in conscious, effective, and ethical leadership and governance.

A vitally important element of any retreat or training should be an opportunity for group members to be reminded (or to learn) the connections between board participation and one’s Jewish heritage, and what Jewish tradition has to say about the roles and responsibilities of leadership.

Following are a few options for how to integrate text study into your board orientation:

- Prepare a presentation on the history of Jewish leadership. The speaker can use the summary beginning on page 15 as a resource. Following the presentation, have a group discussion on the following questions: Who are the Jewish leaders you would like to emulate? Who would you prefer *not* to emulate? Why? Which Jewish leadership style do you prefer?
- Divide the group into *hevruta* (pairs) for traditional text study, and assign each pair texts from one epoch of Jewish civilization Traditional text study (i.e., biblical, rabbinic, medieval, modern, contemporary). Texts begin on page 18.

Each *hevruta* should study at least one of the texts and be prepared to present it to the rest of the group. Questions to be explored include: How do the following texts reflect your values? How do they conflict? What do each of these texts have to do with leadership? Do these texts reflect your community's mission statement or communal guidelines? How or how not?

Afterward, regroup and compare the texts from each of the epochs. Are they in conflict with each other? How could these texts help your board develop a spiritual path?

- Prepare a brief *d'var torah* (word of Torah): Begin each day and/or each meal with a word of Torah, using one of the texts beginning on page 18 or the blessing on page 6.

Traditional Jewish Text Study

A Brief History of Jewish Leadership

Rabbi Shawn Israel Zevit

The biblical saga is interwoven with stories of leaders and communal authority. Although these leaders are not rigidly defined within the models of leadership we know today, one can recognize clear distinctions within their roles. The most famous biblical leader and, arguably, the most intriguing was Moses: rebel, redeemer, miracle worker, judge, prophet, and lawgiver. Many years after his time, Jewish authorities viewed Moses as the archetypal Jewish leader. Rabbinic discussion often uses a variety of leadership traits recognized in him to justify the rabbis' leadership approaches.¹

Other biblical leaders include:

- Abraham, the tribal leader;
- Jacob/Israel, the God-wrestler;
- Joseph, the economic wizard;
- Miriam, the well-spring;
- Aaron, the high priest;
- Joshua, the military commander; and
- The seventy desert elders.

Later biblical writings describe judges, kings, scribes, and prophets. Over thousands of years, these models and others vied for authority.

Just as authority was seen to centralize in one person, it also manifested in groups of people. They include:

- *Cohanim* (priests);
- *Levi'im* (Levites);
- Firstborn;
- Elders;
- *Anshei Knesset Ha-Gedola* (Men of the Great Assembly);
- *Sanhedrin* (Council of Sages);
- Courts of Three, Seven, and Twenty-One;
- *Geonim* (leaders) of Babylonia;
- Exilarchs of Babylonia;
- Scholars;
- Politicians;
- Entrepreneurs;
- Financiers;
- *Tzadikim* (righteous persons);
- Hasidic rebbes;
- Social activists; and
- Zionist thinkers.

¹ Ehrlich, Avrum M., General Description of Pre-Hasidic Jewish Leadership.

From the beginning of recorded Jewish history, religious and political authority were both connected and, at times, in tension within the Jewish community. Communal leadership sometimes assumed two overlapping but distinct forms. On the one hand, there were the religious judges or rabbis whose expertise in Torah law gave them special authority. On the other hand, communal control over non-*halakhic* (non-legal) public affairs devolved upon the “elders,” whose authority derived from their age, wealth, family lineage, and other personal qualities. They maintained public order, collected taxes for the local authorities and for the support of Jewish social services, and served as the liaisons with the Christian or Moslem rulers. To govern effectively over these areas of public life, what was needed was not just expertise in Jewish law, but also experience and influence. For example, in Germany in the 13th century, the religious judges were merchants, tax-payers, and among the elders who decided public policy. As communities grew in size and complexity, communal roles became more differentiated, and by the 13th century, a paid rabbinate gradually developed in Germany.²

In the medieval period, authority was exercised collectively by the rabbinical judges and the *parnasim* (Jewish civil authorities), acting together with other elders. The early Jewish community was an oligarchy run by the consensus of the elite. Still, a theory of association by voluntary consent underlay the Jewish community board’s authority “to make agreements.” Such agreements had the legal force of an oath or vow made by the individual members to follow the community’s decisions. This oath, in turn, was a theoretically covenantal bond established with “those who are not here with us this day” (Deut. 29:14).³

From the 13th century on, in Spanish and in German communities, a variety of leadership qualifications and qualities emerged over time. Many aspired to, if not always achieving:

- Knowledge in Torah, rather than aristocratic lineage, as a central requirement for communal leadership;
- Preference for an economic background in trade and commerce as a better qualification for communal leadership than “court culture” and connections;
- Subordination of all elected, executive, and communal functionaries to the rule of the spiritual, talmudic leaders at their collective forum, the *bet din*;
- A candid demonstration of a deep social sensitivity and concern about the economic welfare of the poor and the weak;
- An honest and outspoken abhorrence of greed, avarice, and addiction to luxury; and

² Ostow, Moshe Idel Mortimer, Jewish Leadership in the 13th Century.

³ Ibid.

- a deep concern for a full and equal talmudic-rabbinic education for all and the establishment of a variegated system of *yeshivot* (study halls).⁴

From the birth of modern Jewish history in the 17th century onward, other patterns emerged. For instance, community leadership was elected by the members or by the privileged among them. The leaders exercised the measure of political power conceded to the community by the non-Jewish authority. This included the coercive power of taxation for the collective payment due the gentile authorities and the maintenance of Jewish institutions. It also included the authority to control the behavior of members of the community, their business conduct (especially in dealings with non-Jews), their social behavior, and their religious observance. As a means of control, the leaders had at their disposal most means of coercion (short of capital punishment): fines, imprisonment, pillory, and different grades of religiously sanctioned bans.

In addition to the community organization, there were other institutions to which people resorted for the satisfaction of certain needs and to whose maintenance they contributed more or less voluntarily. These included synagogues, houses of study, schools for indigent children, and, in many places, *yeshivot*.⁵

As modern Jewish life has evolved from the 19th to the 21st century, Jews have been experimenting with different models of leadership and governance. In Reconstructionist communities, we strive to maximize the participation of our membership in democratic, participatory governance structures, which include a balance of rabbinic, lay, and professional input.

As a result of ongoing adaptation to a variety of internal and external situations over the millennia, leadership and governance structures in Jewish communities have been influenced by a combination of religious, political, social, economic, and situational factors.⁶ Today, we have the opportunity to develop appropriate leadership structures by examining these factors and responding consciously and with flexibility to the needs presented to us at this time.

⁴ Ibid.

⁵ Katz, Jacob, Out of the Ghetto: The Social Background of Jewish Emancipation, 1770-1870.

⁶ Ehrlich, Avrum M. General Description of Pre-Hasidic Jewish Leadership.

Traditional Jewish Text Study

Exploratory Texts

The following texts are presented as tools for exploring Jewish values concerning communal governance and leadership.

Biblical

Deuteronomy 1:9-15

ט וְאָמַר אֲלֵכֶם בְּעַת הַהוּא לֵאמֹר לֹא-אוּכַל לְבַדִּי שָׂאת אֶתְכֶם:
י יְהוָה אֱלֹהֵיכֶם הִרְבָּה אֶתְכֶם וְהִנֵּכֶם הַיּוֹם כְּכֹכְבֵי הַשָּׁמַיִם לְרֹב:
יא יְהוָה אֱלֹהֵי אֲבוֹתֵכֶם יִסֹּף עֲלֵיכֶם כְּכֶם אֶלֶף פְּעָמִים וַיְבָרֵךְ
אֶתְכֶם כַּאֲשֶׁר דִּבֶּר לָכֶם: יב אֵיכָה אֲשָׂא לְבַדִּי טַרְחַתְכֶם וּמִשְׁאָכְכֶם
וְרִיבְכֶם: יג הִבּוּ לָכֶם אַנְשִׁים חֲכָמִים וְנִבְנִים וַיִּדְעִים לְשִׁבְטֵיכֶם
וְאֲשִׁימָם בְּרָאשֵׁיכֶם: יד וַתַּעֲנוּ אֹתִי וַתֹּאמְרוּ טוֹב-הַדָּבָר
אֲשֶׁר-דִּבַּרְתָּ לַעֲשׂוֹת: טו וְאֶקַּח אֶת-רָאשֵׁי שִׁבְטֵיכֶם אַנְשִׁים
חֲכָמִים וַיִּדְעִים וְאֶתֶּן אוֹתָם רָאשִׁים עֲלֵיכֶם שָׂרֵי אֲלָפִים וְשָׂרֵי
מֵאוֹת וְשָׂרֵי חֲמִשִּׁים וְשָׂרֵי עֶשְׂרֵת וְשָׂרִים לְשִׁבְטֵיכֶם:

9. And [Moses] spoke to you at that time, saying, I am not able to bear you myself alone; 10. Adonai your God has multiplied you, and, behold, you are this day as the stars of heaven for multitude. 11. Adonai, God of your ancestors, make you a thousand times so many more as you are, and bless you, as [God] has promised you! 12. How can I myself alone bear your weight, and your burden, and your strife? 13. Choose wise and understanding people, known among your tribes, and I will make them rulers over you. 14. And you answered me, and said, The thing that you have spoken is good for us to do. 15. So I took the chiefs of your tribes, wise people, and known, and made them chiefs over you, captains over thousands, and captains over hundreds, and captains over fifties, and captains over tens, and officers among your tribes.

Judges 8:22-23

כב וַיֹּאמְרוּ אִישׁ-יִשְׂרָאֵל אֶל-גִּדְעוֹן מִשְׁלַבְנֹו גַם-אַתָּה גַם-בְּנֶךְךָ
גַם בֶּן-בְּנֶךְךָ כִּי הוֹשַׁעְתָּנוּ מִיַּד מִדְיָן: כג וַיֹּאמֶר אֱלֹהִים גִּדְעוֹן
לֹא-אֲמַשֵּׁל אֲנִי בָכֶם וְלֹא-יִמְשַׁל בְּנֵי בָכֶם יְהוָה יִמְשַׁל בָּכֶם:

22. Then the people of Israel said to Gideon, Rule over us, both you and your son and your grandson also; for you have saved us from the hand of Midian.

23. And Gideon said to them, I will not rule over you, nor shall my son rule over you; God shall rule over you.

Rabbinic and Medieval

Pirkei Avot (Ethics of Our Ancestors) 1:14

יד הוא ה'יה אומר, אם אין אני לי, מי לי. וכשאני לעצמי, מה אני.
ואם לא עבשתי, אימתי:

Hillel said: If I am not for myself, who will be for me? If I am only for myself, what am I?

Jerusalem Talmud, Yevamot (translated by Rabbi Rami Shapiro)

The townspeople of Simoniah came to Rabbi Yehuda HaNassi and said: "We would like to hire someone who can interpret Torah for us, set our standard, supervise our synagogue, and oversee whatever might be our needs." He sent them to Rabbi Levi. The Simonians made him a large bima, sat him upon it, and approached him with a question of *halakha* (Jewish law). He gave no answer. They asked him another question, and again he did not reply. They said: "Perhaps he is not an expert in *halakha*. Let us ask him to explain a verse of Torah." They did so, but still he said nothing. They went back to Rabbi Yehuda HaNassi and said: "Is this the way you satisfy our request?" He replied: "I swear I have given you someone as good as myself. Bring him here." Rabbi Yehuda asked him the same three questions, and he immediately and brilliantly replied. Rabbi Yehuda asked him: "Why did you not answer them from the first?" Rabbi Levi replied: "Because they made me this huge bima and sat me upon it, and I became so enthralled by my own self-importance that I could not function properly."

Babylonian Talmud, Tractate Shabbat 54b

All Jews are responsible for one another.

Babylonian Talmud, Tractate Ta'anit 11a

At a time in which the community dwells in suffering, one should not say, let me go to my house to eat, drink, and place my *nefesh* [soul] in *shalom*.... When Jews are in trouble and one separates oneself from them, then the two angels who accompany every person come and place their hands upon his head and say: So and so who separated himself from the community will not witness its

deliverance...but one who shares in the distress of the community will merit to witness its deliverance.

Babylonian Talmud, Tractate Sotah 40a

R. Yitzhak said: Let respect for the community always be with you, for you will note that (when blessing the worshipers), the priests' faces were turned toward the people and their backs were toward the Presence. Rabbi Nahman derived this rule from: "Then David the king stood upon his feet and said: 'Hear me, my brethren, and my people'" (1 Chronicles 28:2).

Tanhuma Mishpatim 2 127a

A person who says, "What do I have to do with the burden of the community?" destroys the world.

Avot d'Rabbi Natan

[A commentary on the Midrashic phrase] "Make a fence around the Torah" (Pirke Avot): A vineyard with a fence is better than a vineyard without a fence, but no one should make a fence more important than what it hedges in.

Modern Texts

Moses Menz, Germany, 17th century

If one wishes to assemble the communities for the purpose of adopting ordinances for themselves and their environs, one announces a day on which these communities that wish to follow the new regulations shall get together, each dispatching two or three delegates. The resolutions are thereupon transmitted to the various communities through letters to be read before the assembled congregations so that they may be readily observed.

London Sephardic Congregation, 19th century

...No person who may be elected to any office of this *Kahal Kadosh* [holy community] shall be able to decline it in any wise, nor after accepting it to retire from it, even though he may have reasons that appear very just, in order not to interrupt the order of the elections; and he who shall be obstinate shall pay a penalty of 10 pounds sterling, and shall not be admitted for the period of three years to any *Misva* (synagogue honor), nor shall he be called to the *Sefer* (the recitation of the weekly lesson).

Rabbi Kalonymus Kalman Shapira (Warsaw Ghetto),
from *Conscious Community*, translated by Andrea Cohen-Werner

Our association is not organized for the purpose of attaining power or intervening in the affairs of community or state, whether directly or indirectly. Quite the opposite: Our goal is to gradually rise above the noise and tumult of the world by steady, incremental steps. It is not consistent with our goals to hand out awards as to who is advanced and who lags behind. The whole premise of our group is the vast human potential for both baseness and elevation. Our bodies and souls are currently quite unevolved, but our potential for holiness is very great. Holiness is our key and our primary value; honors and comparisons serve no useful purpose. It is vitally important that we do not create, God forbid, any boundaries that separate us from Jews who are not members of our group. The whole point of our association is to love each other as much as possible. If there were a fire in town, the fire company would come to put out the fire and save lives. The firemen use the equipment that they have brought with them and the techniques that they have been trained to use. Will they ridicule and avoid the citizens of the city, who are trying their best to put out the flames and save lives? Each one "saves" in the way he can, but the fire company can be more effective. The techniques available to a group are qualitatively different from what an individual can hope to attain. It is important for us to be explicit and clear that our society accepts into its ranks only those individuals who share these concerns. If people know in their hearts that they are not similarly burdened with these concerns...we ask that they do not join our group. They will harm themselves and others. Their presence will serve as a distraction to the rest of the group, whose hearts and minds are sincerely focused on this work.

Contemporary

Rabbi Mordecai Kaplan, *The Future of the American Jew*,
Philadelphia: Reconstructionist Press, 1981. pp. 397-8

Government which is based not merely upon the consent, but upon the active participation of the governed, is in a position to verify the deepest insight of religion that every human being is created in the image of God. Consequently, any law which reflects the interests of those who are governed, and who, by obeying it, expect salvation, may be regarded as having divine sanction. When a law is not just or good, it frustrates our quest for salvation, and therefore, may be viewed as running counter to the will of God.

Rabbi Mordecai Kaplan, *The Religion of Ethical Nationhood*,
New York: Macmillan, 1970. p. 147

A Jewish community organization capable of satisfying the need for Jewish status, self-respect and wholesome adjustment to life must envisage the problem of Jewish life in its entry. No Jewish interest can be alien to it. Its functions may be considered under six heads: administrative, economic, cultural, social services, public relations and political.

Jewish Reconstructionist Federation, *Boundaries and Opportunities*, 1998

Community is central to Judaism. The Mishnah promotes the efforts of those who support community. Jewish tradition emphasizes responsibility and respect for the community. The Reconstructionist movement sees belonging to the Jewish people and participating in Jewish community as central to Judaism. In Reconstructionism, the local community takes on added significance as the locus of authority and decision-making. It has the authority to establish communal expectations and standards.

John Heider, excerpted by Rabbi Rami Shapiro

The well-run community is not a battlefield of egos. Of course there will be conflict, but these energies become creative forces. But if leaders lose sight of how things happen, quarrels and fears devastate the group. This is a matter of attitude. There is nothing to win or lose in the community. Making a point does not shed light on what is happening. Wanting to be right blinds people. Wise leaders know that it is far more important to work with what is actually happening than to get upset over what might be happening, but isn't.

Chapter Four: Leadership Theory and Practice

While, as Reconstructionists, we value the many voices found in our traditional texts, we also attach great importance to finding guidance from contemporary research and theories.

This chapter contains two articles. The first applies contemporary systems theory to the congregational model. The second, an excerpt from the report of the “Reconstructionist Commission on the Role of the Rabbi”, is offered as a model of thinking through the dynamics and systemic factors that impact leadership roles in a congregation. We suggest that you review the articles for homework before gathering together. Jot down any questions or comments that you may have. As a group, consider participant questions and/or the ones below:

- What theories or segments of your work life could you apply to board development or to making your community/synagogue a better system?
- How do boards and committees attract new people to become leaders or participants?
- What is the role of the nominating committee in attracting new leadership?
- How can congregations best utilize the diverse skills of the membership within the governance system?
- What are some of the ways that congregations include members of different generations on their boards and committees?
- How do board training and board manuals function as tools to recruit and retain new leadership?
- In your community, is *kavod* (respect) extended to past leaders and founding members?
- How are their expertise and knowledge integrated?

The following are some suggested activities for group members after they read the text:

- **Create a strategy for identifying potential leaders.** Develop current prospect list with prioritization of skills and positions to be filled. Consider:
 - Who is ready for leadership now? Who needs more training or guidance for a period of time?
 - How will members be invited to join?
 - What activities will most guarantee their initial success and showcase their skills in order to bolster confidence?

- Do they have the technical skills but lack interpersonal skills? Are they better off taking leadership in an area of less direct human impact?
- If the group does not have the time to read the article before gathering, consider a jigsaw exercise:
Divide the text into sections, and then split into groups. Each group takes one section of text, reads it and discusses it. Then, rearrange participants into new groups so that each new group has a member from each of the groups. Group members can then present what they read and discussed, thereby allowing each participant to get a taste of the articles.

Leadership Theory and Practice Congregational Systems and Leadership

A compilation of articles by: Rabbi Shawn Israel Zevit, Rabbi Mordechai Liebling, and Rabbi Yohanna Kinberg, with excerpts from *The Rabbinic-Congregation Relationship: A Vision for the 21st Century*, Report of the Reconstructionist Commission on the Role of the Rabbi, Rabbi Richard Hirsh, editor

“I slept and dreamt that life was Joy;
and then I awoke and realized
that life was Duty.
And then I went to work—and, lo
And behold I discovered that
Duty can be joy.”

Rabindranath Tagore, Indian spiritual leader

Rabbi Yehoshua ben Levi said:
I once learned eighty laws concerning graves that had been plowed over, but
because I was so involved in community affairs, I forgot them all.

Ecclesiastes Rabbah 7:7, Section 1



Reconstructionism has long advocated the importance of being familiar with the social as well as the natural sciences, and of applying their insights to Jewish life. History, psychology, and sociology have had significant influences on the ways in which Reconstructionism approaches the shaping of a post-modern Judaism.

Beginning in the 1960s and 1970s, “systems theory” emerged in the fields of family therapy, anthropology, and communications, as well as in the business world. A systems approach looks at the totality of a social organization and the interaction within it. This approach recognizes that the parts interact with complexity, with the whole being greater than the sum of its parts.

Systems theory recognizes that what appears to be discrete and individual is, in fact, interconnected, dynamic, and determined by a multiplicity of factors that interact in complex ways. Nothing is static; everything is in process. For Reconstructionists, this may sound familiar: What contemporary organizational theorists call systems theory is similar to what Mordecai Kaplan called the principle of “organic reciprocity.”⁷

As applied to congregational life, a systems approach sees the totality of the congregational system and the interaction of the component parts, rather than looking only at individual roles and functions. Kaplan writes:

The human being is not a self-contained atom, but is the product of the biological, historical and social forces that operate in the group to which he belongs... What has been said of words in relation to their context is true of human beings in relation to their communities; they are not “pebbles in juxtaposition”; they have only a communal existence; the meaning of each interpenetrates the others.⁸

“Organicity,” for Kaplan, implies mutual responsibility and ethical conduct. Thus, there are spiritual as well as organizational possibilities in using a systems approach to understanding congregational life and the lay leader/staff-member roles and responsibilities.

Individuals, of course, play a role in and affect a system, as do the subsystems of the congregational system (e.g., Jewish values-based capital campaign, Bar/Bat Mitzvah policies, rabbinic-search process, etc.). As Dr. Nancy Post, an organizational consultant and a member of JRF affiliate Mishkan Shalom in Philadelphia, writes:

A system needs to be seen within the larger system of which it is part; a specific congregation exists within the larger pattern of congregations, such as the Reconstructionist movement, and is influenced as well as having influence on the larger system. Subsystems, such as a congregational board, or the education, ritual, fund-raising or social action committees, are all microcosms of the system as a whole and will often duplicate its patterns.

Congregations also go through lifecycles. This means assessing what the roles are of *current* leadership in *this community* at *this* moment in its development. For example, newly formed congregations may not want to handle difficult

⁷ Quoted from *The Rabbinic-Congregation Relationship: A Vision for the 21st Century*, Report of the Reconstructionist Movement on the Role of the Rabbi, Fall 2000.

⁸ Rabbi Mordecai Kaplan, *The Future of the American Jew*, p.148

policy issues, which can become divisive if they remain unresolved before the secondary stages of stability and consolidation are reached. More developed congregations with precedent and policy may welcome active engagement with substantive issues that help to chart new directions. The rabbi, other staff, and lay leadership play a primary role in the congregational system by setting and following through on the agenda in response to the congregation's circumstances along with communal input.

A systems approach can provide rabbis and congregational leaders with a new approach to understanding their work, their roles, their interaction, and their place in the communal system. At any given moment, for example, specific individuals may be responsible for exercising leadership, but leadership is an activity of the congregational system, rather than the job of one particular person. This broadens the traditional boundaries for staff and lay leadership roles.

In religious communities and organizations, one aspect of leadership we recognize is moral leadership. We ask whether a leader holds values we respect and acts on them. In addition to a traditional definition of a leader as someone who influences a community to follow his/her vision, a Reconstructionist definition includes how a leader helps a community to grow, face its own problems, and develop solutions. In other words, strong leaders help elicit and manage a community's vision. Leading effectively also includes:

- Managing interpersonal relationships and structuring processes that achieve mutually agreed upon goals;
- Harmonizing the managerial responsibilities of congregational employees, committees, and members with respect for the sacredness of Jewish religious, social, and cultural life, the welfare of the Jewish people, and our global community and environment;
- Making congregational leadership a renewing and productive experience; and
- Providing suggestions and tools to prospective leaders, which will help to develop leadership and the community of the future.

Recognizing that leadership is a work-in-progress is in no way an abdication of vision or goals. Part of our spiritual work is closing the gap between life-as-it-is and life-as-it-can-be. Through that work, we expand God's presence in our own and our community's life.

Seen in this light, leadership is an activity that takes many forms. This permits qualities of leadership to be taught and acquired. Leadership is an inherent human spiritual possibility, a part of *tzelem elohim* (the reflection of Godly action in humanity). Moral leaders take responsibility for their own actions.

Everyone in the congregation can have vision, affect the communal vision, and be affected by it. Or, as Moses says in response to levitical concern over prophesy “breaking out” in the Israelite community, “Would that all God’s people were prophets, and that God would put God’s spirit upon them!”⁹

Of course, people are more likely to take on a specific job, rather than open-ended responsibilities. Every committee should set goals that meet the needs of the community, just as the community and its leadership must define the goals.

As Ron Heifitz writes in *Leadership Without Easy Answers*: “There is a great amount of learning required to diminish the gap between the values we stand for and the reality we face.” We interpret problems according to the values we hold. A capable leader understands that in any community there are competing values that require flexibility and change, and part of leading is helping people to articulate and face their own values and to work together to make conscious decisions that benefit the community.

There are areas of challenge that face Jewish leaders in particular. Certain patterns of internalized oppression- accepting the messages and characterizations of others about our own group, whichever that group may be, and believing them to be true- can make leadership of Jewish groups difficult for the leader. Community members may attack their leaders and get angry at their authority figures.

For many centuries, Jewish leaders had a big role in keeping their communities alive. The community relied heavily on its leaders, and often worried about the effect of its leaders’ actions. Jewish leaders were often killed or forced to cooperate with authorities outside the Jewish community. This contributes to anxiety around “getting it right” at all times, and to fears about making mistakes and about the consequences of our actions. The need to support our leaders, affirming them, not only criticizing them, is crucial to the overall health of a communal system.

Both leaders and the community at large must encourage honesty, creativity, and the maintenance of healthy boundaries and structures to avoid burnout and ineffectiveness. Internalized fears of making mistakes or expectations of perfection in Jewish leadership make for a critical and often stuck environment in which to function as a leader. If unaddressed, these fears can lead to our blaming authority, unfairly scapegoating, externalizing problems, denying problems, or focusing on marginal issues to avoid major ones. When in a leadership role ourselves, we may habitually attack other leaders or undermine our own confidence by having unrealistic expectations of ourselves and others

⁹ Numbers 11.29

in a volunteer position, or by becoming unsupportive of the rabbi or professional staff in our communities.

It is equally important for leaders to understand the defensive mechanisms of a congregational system and to help people learn from resistance and reactivity. One way is to openly discuss some of the pitfalls of leadership as a group to move this out of the “hidden realm” and advocate for greater consciousness and ownership of leadership dynamics and challenges in a Jewish environment. Clarifying communal values and studying Jewish texts and traditions around leadership can also help in dealing with leadership challenges. Leaders must also develop their own support systems inside and outside the community and do their own personal work to hold this sacred trust.

Leadership development—the process of attracting, integrating and training new leaders into the governance system—is a challenge for most congregations. Too often, people take on board and committee positions because “no one else was willing.” Too often, people take on positions of leadership for which their personal skills are not suited. Though challenging, leadership development is one of the most important aspects of congregational governance, because it ensures future generations of dedicated leaders and thus ensures the future of the congregation.

- Complaints about roles/responsibilities do not attract new leaders: Look for the positive, and publicly affirm the board. People want to be a part of a board that is positive, action-oriented, and educational.
- Committees need to be efficient and get their work done. The committee chair is crucial to the long-term success of a committee. People should be assigned tasks they can handle well.
- In small or medium congregations, the president is often the de-facto executive committee (volunteering 15-20 hours a week). To avoid burnout, the president’s job should be structured so that it can be done in fewer hours (5-10); often, this requires greater delegation.
- Congregations should consider what they are willing to pay for staff to do in order to have sufficient volunteer time to set policy and priorities for the community.
- The current leadership needs to understand that a large part of its job is to develop future leadership.

Leadership Theory and Practice
*The Rabbi-Congregation Relationship:
A Vision for the 21st Century*
A Report of the Reconstructionist Commission
on the Role of the Rabbi¹⁰

Fall 2000, Rabbi Richard Hirsh, Chair

EXECUTIVE SUMMARY

The relationship between rabbi and congregation is ideally understood as a sacred covenant in which the partners share in the nurturance, guidance, planning, and programming of the synagogue. As in any relationship, however, the best intentions, strongest commitments and agreement on shared values do not guarantee that the relationship will always run smoothly. As in any relationship, differences must be negotiated, compromises reached, and decisions made with which each partner may not always be in full agreement.

In recent years, relationships between rabbis and congregations have increasingly been subject to disruption and dissent. At a time when increasing numbers of North American Jews are eagerly undertaking significant commitments to Jewish study, Jewish observance, and Jewish community, our congregations and rabbis are often unable to respond fully with their best resources. An inordinate amount of time and energy is being used in response to problems of the rabbi-congregation relationship.

Rabbis and rabbinical students increasingly indicate a reluctance to serve in congregational settings. They cite several common concerns: that the job is simply unmanageable; that boundaries between personal and professional time cannot be established; that the variety of roles they must fill creates unreasonable expectations and confusing standards of evaluation; that an absence of efficient and effective models of decision-making, communication, and leadership hinders their work.

Congregation leaders communicate concerns about dealing with the rabbi as an employee while also interacting with the rabbi as a spiritual leader, pastor, teacher and officiant; about how to understand the rabbi's role in the congregation's leadership, decision-making and authority structure; and about how to use fully the resources the rabbi brings to the congregation.

¹⁰ Similar analysis could be done for other staff and lay leadership. For the full report, contact JRF at 215.782.8500.

In response to these and related concerns, in January of 1998 the Reconstructionist movement convened the Commission on the Role of the Rabbi, comprised of representatives from the Reconstructionist Rabbinical Association (RRA), the Jewish Reconstructionist Federation (JRF), and the Reconstructionist Rabbinical College (RRC).

The commission hoped to develop new models for the relationship between rabbis and congregations, and sought to provide practical advice, suggestions, and strategies.

Summary of Key Points

The Report of the Commission addresses three key areas:

- A framework for thinking about the rabbi-congregation relationship, using Jewish values, conceptual categories and current leading trends in organizational and leadership theory and practice.
- An analysis of rabbinic roles, professional as well as personal, and new ways of understanding those roles.
- A program for building, maintaining, and enhancing the rabbi-congregation relationship, with specific suggestions beginning with a rabbinic search and continuing through the time when the relationship ends and the rabbi leaves the congregation.

PART 1: Finding a Framework

- The first section of the report opens with a brief history of the rabbinate, placing the contemporary situation in historical context. As Reconstructionism views Judaism as the evolving religious civilization of the Jewish people, it is not surprising to discover that the institution of rabbi has undergone considerable development over the past two millennia.
- Reconstructionism affirms the importance of working with Jewish concepts, categories, and values, and using the wisdom and insights of tradition to help reconstruct Jewish life today. We seek consciously to use values-based decision-making in our communities. Fundamental Jewish concepts like *brit* (covenant) and *kavod* (honor/dignity/respect) should guide the rabbi-congregation relationship. Jewish tradition yields many values and ideas that can help us think of the congregation or *havurah* as a sacred society.

- Living in two civilizations means being aware of and affected by trends, insights, and information from the wider society. In recent years, a number of fields, including family therapy, anthropology, communications and business have focused on systems theory as a helpful and comprehensive way of understanding how individuals and organizations interact and operate.
- Systems theory is a “way of thinking about how the whole is arranged, how its parts interact, and how the relationships between the parts can produce something new...[A]ny person or event stands in relationship to something. You cannot isolate anything and understand it...[A]ll parts interface and affect each other.” (Peter Steinke, *Healthy Congregations: A Systems Approach*, pp. 3-5) The systems approach is essential to understanding the vision presented in this report.
- Systems theory focuses on the interaction of the individual parts of a system—in our case, a congregational system—so that things are understood dynamically in their relationship to each other, rather than in isolation from each other.
- In the early years of the Reconstructionist movement, rabbis were often seen as “facilitators” and “resource people.” In an attempt to avoid the priestly and authoritarian overtones of earlier rabbinic models, Reconstructionist rabbis did not see themselves as leaders in the congregations they served, and many Reconstructionist congregations were reluctant to vest leadership in rabbis.
- There has been an evolution in the understanding of the role of the rabbi in Reconstructionist settings. Using a systems approach in which leadership is a valued and indispensable component of a congregational system, the report affirms that a rabbi can and should be a (not “the”) leader, can and should be an (not “the”) authority, and can and should play a leading role in congregational decision-making.
- It would be incorrect to see this evolution as a restoration of traditional rabbinic roles, or as a repudiation of the longstanding Reconstructionist commitment to democratic decision-making and lay-rabbinic partnership—both of which the report affirms. The vision is of leadership as an activity of the congregational system in which the rabbi and the congregation leaders collaborate in helping move the congregation forward.

Part 2: The Roles of the Rabbi

- Rabbis play a variety of roles in congregations, some formally defined and others informally assumed or understood. Certain basic categories, such as counselor, teacher, and officiant at congregational and life-cycle rituals, are common to almost all settings. In individual situations, depending on the needs of the congregation and the proclivities of the rabbi, a whole series of additional roles may be in play.
- The complex nature of religious identification and community is often reflected in a series of informal and subliminal issues that influence the relationship of congregants and rabbis. Many of the conflicts that surface around the rabbi-congregation relationship reflect unspoken and unconscious assumptions and attitudes.
- Rabbis need to be actively involved in congregational decision-making. Congregation leaders need to identify the areas in which the rabbi is vested with decision-making authority. Rabbis and congregations working together need to be sensitive to the implications of decisions that affect the culture of a community, and make the processes by which such decisions are reached inclusive and comprehensive.
- Rabbis are intimately involved with religious policies and procedures. As these relate to and affect individuals, rabbis most often operate independently, although in consonance with congregational policies. When dealing with issues affecting the larger congregation, decisions can be made on a variety of levels—committee, board, congregation. But rabbis play a key role in teaching and helping guide the congregation through the study and discussion necessary to formulate responses to issues of the congregation.
- In addition to the many roles they fulfill in service to the congregation, Rabbis are also in the role of employee, with the congregation in the role of employer. Many of the tensions in the rabbi-congregation relationship arise around employee-employer issues: contracts, compensation, and evaluation, to name a few.
- Rabbis and lay leaders can experience burnout. Rather than looking at this as a symptom of the individual only, burnout should be analyzed from a systems perspective. What in the congregational system is resulting in burnout, specifically in rabbinic burnout? How can the rabbinic workload be managed collaboratively, so that essential tasks are accomplished but reasonable boundaries on potentially boundary-less work are established?

- Congregations and rabbis need to examine common assumptions about rabbinic schedules, work, and leisure time and adequate levels of staffing to make the workload of a congregational rabbi more realistic. In helping set reasonable expectations, and in helping maintain boundaries between the rabbi's personal and professional life. The congregation empowers the rabbi to serve more effectively.

Part 3: Practical Dimensions of the Rabbi-Congregation Relationship

- The relationship between rabbi and congregation moves along a continuum, beginning with the application and interview, the initial negotiating and contracting, integration into the community and development of the relationship, contract renewal and continuation, and, at some point, the ending of the relationship. At each stage, specific steps can be taken to help strengthen the rabbi-congregation relationship; strengthening the relationship should be a continual mutual goal.
- Congregations conducting a rabbinic search should see this as an opportunity to assess the congregational system and examine its current needs, resources, and priorities. This will help shape the rabbinic job description, and help identify what specific roles a new rabbi will play at this specific stage of the congregation's development.
- Job descriptions should reflect a shared process of rabbi and congregation, resulting in a document that reflects how the rabbi and congregation see their roles.
- Part-time rabbis need to work closely and carefully with congregation leaders to ensure that expectations as well as responsibilities are mutually agreed upon and communicated to the congregation.
- Negotiations and contracts are two areas where the employer-employee relationship is central. Congregations should approach negotiations and contracting with an awareness that rabbis are highly skilled and trained professionals; rabbis should be sensitive to the fiscal responsibilities of the board and financial realities of the congregation.
- Negotiating and contracting should be carried out in ways that strengthen the rabbi-congregation relationship. Both parties should be aware that protracted and difficult negotiations can have a lasting negative impact on the overall relationship.

- Congregations should work with the rabbi to help integrate her/him into the congregation, devoting appropriate energy and resources to this important task.
- Communication is the essential component for keeping the congregational system healthy, and for sustaining the rabbi-congregation relationship. Common channels of communication include the president-rabbi relationship and rabbi liaison committees.
- Evaluation should be seen as a helpful systemic tool that strengthens the rabbi-congregation relationship. Rather than focusing only on the rabbi, evaluations should see the rabbi in the context of the total congregational system. The congregation itself can be evaluated, so that volunteers, staff, committees, rabbi, and the board are all reviewed in light of the congregation's mission and goals. Evaluations that proceed from a systems approach will focus on the interaction and functioning of the component parts of the congregational system.
- Rabbinic evaluations should not be seen as popularity contests or referendums on the rabbi's contract. They provide a channel of communication through which the rabbi and congregation leaders can assess the rabbi's work in relation to mutually agreed-upon goals.
- When the time comes for bringing the relationship between the rabbi and congregation to a close, steps should be taken to enable the congregational system to place in perspective and honor the contributions of the rabbi while preparing the congregation for the transition to new rabbinic leadership. While honoring the past and taking steps toward closure, the congregation and rabbi also need to focus on the future.
- The Reconstructionist leaders who served on the Reconstructionist Commission on the Role of the Rabbi believe that relationships between rabbis and congregations stand in need of honest assessment, frank discussion, new perspectives, and common commitment to change. They also believe that the steps toward crafting a healthier, happier and more productive relationship between rabbi and congregation are within the reach of every rabbi, congregation and *havurah*.

Introduction to Chapters Five through Eight: Overview of Communal Roles and Responsibilities

The ultimate governing authority in every congregation is the membership. The synagogue board and committees are comprised of individuals from the membership who, after being democratically elected:

- Serve as representatives in envisioning, executing, and preserving the stated goals and values of the community;
- Actualize the goals of the community along with the staff, including its education, worship, religious, social, and cultural activities;
- Manage staff and volunteers; and
- Make sure that all the “work” of the community gets done, including busywork, paperwork, lawn work, spiritual work, and educational work. In short, sustaining the life and vitality of the synagogue rests in the hands of the board and committees, not only with the paid professional staff.

The relationship between the board and the membership creates an organic, living system—authority is delegated to fulfill communally necessary functions.

In the Reconstructionist movement, board and committee structures vary in size, tradition, practice, technique, and the ways in which the rabbi and other professionals interrelate with them. They also vary in the degree to which they delegate authority. No one model will apply to all congregations. A variety of models are available in JRF’s *A Sacred Trust* workbook. You can learn from the range of practices and policies that exist, and determine which examples may be appropriate for your own community.

The following general guidelines for congregational governance are presented with the understanding that the size and life-cycle of any congregation will determine the appropriate communal structure (e.g., in small communities, the board may fulfill the functions of the executive committee). Communication between each of these groups is a key to a well-functioning community.

Our Community: Who Does What?

Membership

- Helps determine mission and values of the community;
- Helps to create long-range direction;
- Approves major initiatives (building campaign, initial hiring of rabbi);
- May approve annual budget; and
- Provides input to and participates in policy deliberations.

Board

- Sets yearly and long-range goals;
- Sets annual budget and approves major spending initiatives;
- Determines policy;
- Establishes and empowers committees;
- Approves rabbi's contract;
- Initiates programs and projects in keeping with community mission and vision; and
- Initiates long-range planning process.

Executive Committee

- Manages the functioning of board and committees;
- Vets proposals to the board (checks to see if proper research has been done, that the proposals are presented in an appropriate manner, that relevant committees have been consulted);
- Sets board agenda;
- Supervises committee structure; and
- Makes urgent and necessary decisions between board meetings.

Committees

- Develop strategy to meet goals determined by board;
- Plan programming/events/ meetings as appropriate;
- Develop proposals for consideration by board;
- Communicate with board via executive committee; and
- Recruit and integrate new members into leadership.

Chapter Five: Board Roles and Responsibilities

As you study this section, make explicit the unspoken or implicit expectations of board members. If a new board can discuss openly what its expectations are and what its process will be, potential areas of conflict will be minimized. This will get the group used to working cooperatively and enhance members' abilities to listen to each other.

Following are a few examples of communities' "communal responsibilities" or "board members' roles and responsibilities" documents. Read through them as a full group and discuss them, or divide into smaller clusters, each reading a document and presenting it to the full group.

Some questions for your group to discuss include:

- How do the following documents, from other congregational boards, reflect effective models for communities or governing boards according to the size and demographics of a given community?
- How are the basic requirements of community or board membership articulated in these documents?
- How are the values of the congregation and Jewish models of leadership demonstrated in these documents?
- What are some of the basic elements of board-member job descriptions as demonstrated by these sample documents?
- How are term limits defined?
- How is the pool of skilled and talented people brought forth?
- How can collective responsibility be promoted?
- How can boards function effectively without undermining the committee process?
- How can boards reach out to those whom they represent (the congregants) and ensure that they are bringing the voices of all constituencies in the congregation into the decision-making process?

Following are other activity suggestions:

- **Create or update your community's "board roles and responsibilities" document using the following process:**
 - Does your community already have a "board member role and responsibility" document? If not, perhaps you should create one. If one exists, does it need updating? If your document does not need updating, it might still be important to compare it to other congregations' documents, to see where there are similarities or

differences. Should your document cover the board only, or should it also encompass the entire congregation? Are there different roles for board officers and board members?

- Before reading any of the other congregations' examples included in this manual, make a list of roles and responsibilities that have been expected in the past. Note that different board members may have different expectations—even (and perhaps especially) if the members are not new to the board.
 - Make a wish-list of what you all would want board member responsibilities to look like. There does not have to be agreement on either the past or on the wish-lists.
 - Distribute the communities' board member responsibilities documents (beginning on page 42), and suggest the creation of a similar document for your group.
 - Divide into *hevvruta* (study pairs) and assign each pair one or two versions to review, noting what they like/don't like, what would be appropriate for this community, what not, etc.
 - Report back, allowing for discussion until consensus is apparent around most issues. (If an issue arises that needs further discussion, table it for now.)
 - Create a committee that will draft something to be presented at the next board meeting and adopted as the new statement of board member roles and responsibilities. This committee can also be assigned the job of facilitating discussion of any leftover "tough issues" at a future board meeting.
 - Consider bringing your list to the congregation for its approval.
- Find a copy of "Robert's Rules of Order," which are legally mandated in almost every state. Have one participant review it, and see how/if it can be used in your board or committee processes.
 - Read "Behavioral Covenants in Congregations: A Handbook for Honoring Differences", by Gilbert Rendle (Alban Institute). Apply this book to your own group process. Specifically, discuss what rules of behavior you should have for your meetings. Make a list of appropriate behaviors.
 - Refer back to "Congregational Governance: Who Decides What?" (p. 37) to help the board map out a decision-making process for its community. One way to do this is to use an issue that the community is currently grappling with (or has recently grappled with) and follow it through from committee discussion through executive committee review, other committee input, and board action.

- Look at three different board/staff relations charts¹¹ and attempt to create one that works for your community. Don't get caught up in creating the perfect chart; it is a tool for discussion, not an end in itself.
- **Budget-reading:** Some new board members (and perhaps some returning ones, as well!) may not be able to understand or read your community's budget. If you think that may be the case, read through this year's budget. Describe the process for creating your community's budget. (i.e., when does the budgeting process begin? Who is involved? What happens if, mid-way through the year, it looks as if income projections will not be met?) For more information on budgeting, see *A Torah of Money* resource book or the JRF *Money and Values* curriculum guide.
- **Consider the many faces of a congregational leader:**
 - Active listener;
 - Networker;
 - Referral point;
 - Bringer of other expertise;
 - Intervener and provider of direct service to a community/individual;
 - Educator about Reconstructionism;
 - Builder of personal relationships;
 - Communications manager;
 - Coach;
 - Consultant;
 - Counselor;
 - Facilitator;
 - Confidante; and
 - Reflective thinker who helps congregants do same.

Discuss: Which roles do you (as individuals or as a group) fulfill? Which ones do you need to fulfill? Which ones are not necessary?

Remember, it is not solely the work of the board to generate policies. Where there is a more extensive leadership structure, policy proposals should come from committees to the board. It also is not the job of the board to micromanage committees. Committees are accountable to the board in fulfilling their mandates and informing the board about their work. It is helpful to have a liaison to the board or executive committee from each committee. In general, decisions should be made at the most grassroots level possible.

The goal of a healthy "board process" is to create a cooperative environment for the board to do its work. In congregations where there is a history of conflict or a wide diversity among members, it can be helpful for the board to discuss explicitly how members will talk with each other during the year. Once board members have some clarity about their roles and responsibilities, they can begin exploring how decisions are made and what the governance process for their community will actually look like.

¹¹ JRF, *A Sacred Trust* workbook, Appendix C.

When a proposed policy is on the table, it may be important to look at the role of staff members involved. Try to identify the points of interaction for staff to the governance structure.

Before we close this section, a few “words to the wise” for board presidents or other supervisors:

- Tools you need:
 - A compassionate heart, an open mind, a supportive spirit;
 - Basic consultative skills through life/professional experience, training at JRF or other programs, experience in the field;
 - Clarifying your strengths and areas of challenge;
 - Familiarity with available resources in the area being addressed; and
 - Ability to do values-based work, rooted in a Jewish/Reconstructionist approach.
- The most important jobs: to communicate and supervise, and to build and share a vision that serves as a source of energy.
- Ongoing supervision of projects breeds ongoing success.
- Supervision and communication are equally important with paid and volunteer staff.
- Give feedback about what is going well. Let volunteers know when you will call them back (for reports, concerns, etc.).
- Use job descriptions to act as a road map; break down actions and mutually agreed upon goals; and define measurable objectives.
- The willingness to be accountable is usually tied to an investment in a dream and the desire to appear successful. It requires a clear course with no change in rules; availability of resources, a stable environment, and mutuality.
- Reduce by one-third of your time as president by delegating tasks; use your time for Jewish study, classes, and prayer.
- The president needs to work with the treasurer on an ongoing basis.

Roles and Responsibilities: A Community Covenant

Jewish Reconstructionist Congregation (JRC), Evanston, IL

The JRC is more than the total of individuals who belong to an institution. At JRC, we deeply value our relationships with one another and with our community. As Jewish tradition teaches, with any sacred relationship there is a sense of *brit* or covenant—a shared understanding of our mutual commitment to one another.

Thus, our JRC Community Covenant is a document that will help us explore the specific nature of our congregation's responsibilities to its members, and in turn, our own responsibilities to the community that is JRC. Characteristically, we consider this to be a work in progress, realizing that we will continue to study, modify, and interpret our Covenant in ways we deem appropriate to meet the ever-changing needs of our community.

Our Community Covenant is not intended as a set of enforceable requirements or standards with which to judge our individual members. Rather, it is a general expression of our own communal and personal expectations. We recognize and cherish the diversity of our membership and understand that each member will interpret and express the terms of our Covenant in different ways and at different times. It is our hope that this *brit* will help us to understand the true meaning of community and especially to understand what JRC truly means to us.

1. Members can expect JRC to help the members understand and feel an attachment to the Jewish people as a whole, around the world and across time.
JRC expects its members to acknowledge their attachment to the Jewish people with pride and personal commitment.
2. Members can expect JRC to teach and practice the values and virtues of Reconstructionist Judaism.
JRC expects its members to learn, uphold, and model those values and virtues.
3. Members can expect JRC to provide spiritual guidance through our rabbi, cantor, and lay leadership.
JRC expects its members to make Jewish spirituality a personal priority.

4. Members can expect JRC to provide a warm, welcoming, and inclusive community.
JRC expects its members to respect our diversity and welcome newcomers to our community with a spirit of acceptance.
5. Members can expect JRC to provide a diverse array of congregational activities.
JRC expects its members to participate and become involved in congregational activities as much as possible.
6. Members can expect JRC to provide quality Jewish educational opportunities to children and adults alike.
JRC expects its members to take Jewish learning seriously.
7. Members can expect JRC to provide serious and challenging *b'nai mitzvah* training.
JRC expects its members to take their children's education seriously and to participate in it.
8. Members can expect JRC to provide spiritually moving and meaningful religious services.
JRC expects its members to enhance our worship by offering their presence, participation, skills, and willingness to learn.
9. Members can expect JRC to provide them with a Jewish communal outlet for Tikkun Olam/Social Action involvement.
JRC expects its members to lend their experience, knowledge, and energy to help us in our efforts to transform and heal the world.
10. Members can expect JRC to maintain the highest level of financial responsibility.
JRC expects its members to meet their financial obligations fully and generously.
11. Members can expect JRC to welcome and respect their input and concerns about JRC.
JRC expects its members to be forthcoming with their concerns and advice.

Members can expect JRC to provide opportunities for congregational leadership.
JRC expects its members to be generous with their time and energy to help our community become the best it can be.

Board Roles and Responsibilities: Board of Directors Statement of Commitment

Beth-El Zedeck, Indianapolis, IN

As we have been entrusted with the privilege of helping to guide and conduct the affairs of our congregation, we, the board of directors of Congregation Beth-El Zedeck, have unanimously and enthusiastically affirmed this statement of commitment in our endeavor to further enrich the physical and spiritual life of our synagogue.

- We enthusiastically affirm the philosophy and purposes of Congregation Beth-El Zedeck as stated in our bylaws: Beth-El Zedeck shall be dedicated to the cultivation and enhancement of Judaism as the evolving religious civilization of the Jewish people.
- The purpose of the congregation is to foster and develop the spiritual, educational, and social welfare of its members in the best tradition of Jewish study, prayer, and community service. The congregation exemplifies and shall follow the principle, ideals, practices, and philosophy of the Conservative and Reconstructionist movements of Judaism.
- We look forward to participating in the planning and implementation of goals and objectives for our congregation by attending board meetings regularly. We are aware that our attendance and input are valued and that it is important for us to share our interests, views and expertise with our colleagues on the board and with the rabbis, cantor, and synagogue professionals.
- We look forward to serving on at least one committee to help enrich congregational life.
- Since the commitment of board members sets the tone for the financial support of the congregation by the membership at large, we pledge to be generous in accordance with our abilities in establishing our fair-share level of membership dues, and through our gifts to the foundation and other appropriate expressions of *tzedakah*.
- In accepting the assignment and honor, we regard ourselves as ambassadors of the board to the congregation, and of the congregation to the board and to the community, and we are conscious that we serve as spokespersons and representatives of the best interests of our congregation.

- We realize and gladly accept the responsibility that it is important for board members to model participation in the religious, cultural, social, and educational activities of our congregation.
- We value the privileges and opportunity afforded as to be yet more informed and committed Jews through this expression of service to our synagogue.

Board Roles and Responsibilities: Thirteen Attributes of Good Board Candidates

Alan M. Marcum, Keddem Congregation, Palo Alto, CA

We're preparing for our annual congregational meeting, which includes election of board members. As part of our work in the nominating committee...we drafted these Thirteen Attributes of Good board Candidates (with apologies both to Torah [thirteen attributes of God] and to Maimonides [Thirteen Principles of Faith]).

1. Supports Keddem's bylaws, vision, and mission.
2. Loves Keddem. Is committed to Keddem. Eager to help sustain Keddem.
3. Causes people to want to do more for Keddem. Is a great role model.
4. Will add value to the board. Will contribute to discussion and process. Brings thoughtfulness to process.
5. Plays well with others. Listens. Is a team-player. Emotionally mature. Considering and considerate.
6. Supports our affiliated organization (JRF).
7. Is willing and able to represent Keddem as one of our ambassadors. Takes this seriously.
8. Is a strong candidate for future leadership development, as needed.
9. If there's a specific niche in need of being filled, fills that niche.
10. Is willing to fulfill a two-year commitment.
11. Expects to attend at least twenty of the twenty-four regular board meetings plus the two retreats during his or her term. Will likely also attend the two budget meetings, and other special meetings from time to time.
12. Has and uses e-mail regularly, or is willing to do so.
13. Has demonstrated competence in past involvement. Knows his or her limits and skills.

Here are two intriguing links to the thirteen attributes:

- Those thirteen attributes, in the Torah (from ORT):
<http://bible.ort.org/books/torahd5.asp?action=displaypage&book=2&chapter=34&verse=6&portion=21>
- The thirteen attributes of God, from Sh"mot 34:6-7 (from a Reform perspective):
<http://uahc.org/torah/issue/970420.html>

Board Roles and Responsibilities: Behavioral Covenant

Congregation Ahavat Shalom, Great Barrington, MA

“In working together, we are guided by norms, by unwritten and often unspoken rules. Our family life, our employment, and our time together in our congregations are guided by norms that tell people that there are acceptable and unacceptable ways of doing things. Some norms are very healthy and appropriate and some are less healthy and can be damaging.”

Behavioral Covenants in Congregations: A Handbook for Honoring Differences,
published by the Alban Institute

Below is a behavioral covenant written by the board of Congregation Ahavat Shalom in Great Barrington, MA. This document was written at a board retreat/training during August 2000. The intention of this document is that it will be part of the board manual and within ready vision of board members during all board meetings. Some of the language of this behavioral covenant was taken from a sample document in the book cited above.

For our work together today, there are some norms, or guidelines, that can be helpful and healthy if we follow them. Our promises to our synagogue family and to each other on the governing board are that we will:

- Remember that our work here today is a part of our spiritual leadership of our congregation. We will treat this work and one another with respect.
- Focus on issues and behavior in our conversations. We will not talk about people.
- Share information with the full group appropriately so that everyone has the information that they need, and we will not reserve our comments for after the meeting or to be shared only with people who agree with us.
- Support the rabbi and staff so that their efforts can be most productive.
- Respect and care for each other.
- Discuss, debate, and disagree openly in the board meeting, expressing ourselves as clearly and honestly as possible, so that we are certain that the board understands our point of view.

- Support the final decision of the board whether or not it reflects our view.
- Treat our time on the board as an opportunity to make an important gift to our synagogue.
- Support each other in the use of process.
- Work on behalf of the community within the framework of Reconstructionist Jewish values.
- Be responsive to issues raised by our fellow board members.

Board Roles and Responsibilities:
Sample Board Meeting Agenda
Or Hadash, Fort Washington, PA

BOARD MEETING

MONDAY, 7:30 PM TO 9:30 PM

1. D'var Torah
2. Review of minutes
3. Old Business
 - 3.1 Long-range planning update
 - 3.2 Spring fundraiser review
 - 3.3 Mitzvah Day review
 - 3.4 Revised proposal for dues reductions
 - 3.5 Rabbi Search Committee
 - 3.6 Budget
 - 3.7 Congregational meeting and dinner
4. New Business
 - 4.1 Nominations for officers and board-at-large
 - 4.2 Proposal to formally combine Social Action and Tikkun Olam committees
 - 4.3 Proposal to add "House Committee" as standing committee
 - 4.4 Shavuot activities
5. Committee Reports
 - 5.1 Membership
 - 5.2 Finance
 - 5.3 Ritual
 - 5.4 Education
 - 5.5 Other
6. Good and Welfare

FUTURE BOARD MEETING: TUESDAY, MAY 16 (calendar 7PM, board 8:30PM)

CONGREGATIONAL MEETING AND DINNER: FRIDAY, MAY 19

Board Roles and Responsibilities: Process for Getting an Item on the Board Agenda Or Hadash, Fort Washington, PA

The president prepares the agenda for the board meeting. All agenda items should be submitted to the president prior to the executive committee meeting preceding the board meeting. There are two ways to get on the board agenda: (a) proposals from committees or (b) announcements taken from the floor at the board meeting.

Committee Proposals

1. Proposals to be discussed by the board are generally first discussed by the appropriate committee.¹²
2. Once the committee decides exactly what it is proposing, a written proposal is drafted and submitted to the executive committee.
3. The executive committee will discuss the proposal to see if it is a fully thought out proposal that is ready for presentation to the board. If additional information is required, the proposal will be referred back to the committee.
4. Once the additional information is obtained, the proposal will be placed on the board agenda.
5. The board will discuss the proposal and the recommendations and make a decision.¹³
6. Occasionally, the decision will need to be approved by the entire congregation, either by vote at a congregational meeting, or by another mechanism.

¹² Suggested Format for Written Proposals

- Clear statement of the proposed idea, suggestion, etc.
- Background so executive committee members know the origin and rationale for the proposal
- Significant issues considered by the proposing committee: pros and cons of the idea, alternatives considered, etc.
- Time-line, if appropriate.

¹³ **Board discussion:** The board discussion is an opportunity for board members to discuss and ask questions and possibly add thoughts that have not been previously included in the proposal. Ideally, this should not be a full rehash of the discussion at the executive committee. However, the board makes the final decision and, therefore, discussion is necessary and desirable.

Chapter Six: Committees

The Executive Committee

The executive committee of a congregation is usually comprised of the president, vice president(s), treasurer, secretary, rabbi, and sometimes the executive director. The function of the executive committee is to act as a:

Leadership group that assists the board in prioritizing and sorting through issues;

- Place where the next president is trained and prepared in terms of information and relationships;
- Locus of information;
- Provider of background to congregation;
- Problem-solving leadership team;
- Place where the rabbi's role is important as part of the team, even though the executive committee always has the right to have an executive session without the rabbi as part of its meeting. (Keep in mind, however, that the rabbi often is key to understanding communal dynamics and knows what is happening on a daily basis.); and
- Group that helps the board function more effectively.

Executive committee members should be in touch with committee chairs before board meetings, and should follow up on whether committee chairs are doing the work they and their committee have promised. Often, the executive committee vets proposals from a committee. It then either returns the proposal to the committee for more work, forwards it to another committee for input, or places it on the board agenda for action when appropriate. The executive committee does not make decisions for the board, but only manages the inflow and outflow of information to and from the board.

Following, on page 55, is one example of a congregational executive committee agenda. Some questions to consider as you read and discuss this agenda are:

- What is the function of the executive committee in your congregation? In other congregations?
- What are some models for the composition of the executive committee?
- What are the roles of the executive committee in relation to other synagogue committees?
- What are the models for the executive committee aiding the board in implementing the process of values-based decision-making and values clarification?

Committees

Committees should be the location of most congregational work. At the suggestion of the board, or in response to pressing issues, committees form policy directives, which then may go to the executive committee (see above), and, ultimately, to the board and even the full community. They also plan and help execute programming as mandated by the board and the mission/vision of the congregation, or involve and collaborate with the rabbi and staff where appropriate.

Committees in congregational life are like staff persons in other non-profits. Once they have their mandates, they only go back to the board in their decision-making processes when they are asking for money, recommending a policy change, making interim reports, or seeking additional information. A committee has relative autonomy as long as it is following congregational policy and acting within its mandate.

Many congregations struggle to define a working committee structure. There is often confusion about the roles of specific committees and the way in which they interact with the board and with other committees. Working out clear definitions of committees can be part of an ongoing board orientation or the focus of a special session dedicated to this topic to which committee chairs and members are also invited.

Every committee should have a liaison to the board or executive committee who is responsible for supervision and feedback.

Some notes on committee dynamics:

- Assign *tasks* to individuals; *decisions* are made by groups.
- Make decisions at the lowest level at which there is competence and trust. Discussions that take place at the wrong level become disruptive.
- Collect all necessary information and prepare recommendations before any item is taken to the board.
- Define goals for the coming year at the committee level, if there is not yet a strategic plan.

An often-overlooked component of board training and orientation is the training of committee chairs. Committee chairs may be included in the overall orientation or be invited to a special session designed for them. The “Checklist for Committee Chairs” (page 55) is useful for review in this area.

As you review the following documents, which were created by other congregations to support their committee structure, consider the following questions:

- What are the functions of committees within the governance system in these documents?
- Who serves on committees?
- Who chairs committees?
- What types of committees can congregations have as part of their governance system?
- What committees might a congregation add to the standard committee list to actualize the mission of the community?
- What are some committee tasks?
- How can boards empower committees to do the “work” of the congregation?
- How can committees increase meeting attendance?

Other activities

- **Create for each committee a set of missions and goals:** (This exercise is especially helpful in communities where committees are new or restructured or where there has been a lack of clarity about committee responsibilities.)
 - Generate a list of committees in your community.
 - Have participants break into groups of two or three and assign each group a committee. (It can be helpful, but is not necessary, for someone in the group to have a connection to the committee to which they are assigned for this exercise.)
 - Ask each group to write a one- or two-sentence mission statement for its committee as well as three to five short-term (one-year) goals. Remind them that committees should be tasked with meaningful work with parameters and that goals should be measurable and quantifiable.
 - After twenty minutes of work, have the small groups report back. The larger group should be encouraged to give feedback. It is important to note where there is disagreement about a committee’s mission.

- Review the “committee documentation” form from the Houston Reconstructionist Havurah (pages 57-58), and amend it for your community.
 - Break into smaller groups, and give each group twenty minutes to work on its form. Report back. (It can be helpful to have the blank sheets available as transparencies or as large tablet paper for everyone to see.)
 - As each group reports, have others comment and provide feedback.
 - At the end of this exercise, suggest that every committee in the community be responsible for filling out a documentation form at its first meeting for board review.

- Create a written process or policy by which poorly functioning committee chairs can be removed from office. For example:
 - A member of the executive committee should be in touch with committee chairs before board meetings, thereby facilitating accountability for committee chairs.
 - If the committee chair is not fulfilling his or her responsibility, the first step should be sympathy on the part of his or her supervisor (usually from the executive committee). Whenever possible, the supervisor should offer help, or should find others who can help.
 - If the work continues to lag, meet again with the committee chair, let him or her know that work still is not getting done, and ask: do you need a co-chair?
 - Finally, if the committee chair refuses a co-chair but the work continues to be delayed, praise the committee chair for what he or she has accomplished, validate his or her intentions, but tell him or her that you need to get the work done, and ask him or her to step down.

Committees: Sample Executive Committee Agenda

Temple Beth El, Newark, DE

Executive Board

I. Welcome	7:30 - 7:35
II. D'var Torah	7:35 - 7:45
III. Previous Meeting Minutes	7:45 - 7:50
A. Special Report: Youth and Camping	7:50 - 8:30
B. Catering Manager Recommendation	
IV. Treasurers Report	8:30 - 8:45
V. Administrative Liaison	8:45 - 9:00
VI. President's Report	9:00 - 9:15
VII. First Vice President	9:15 - 9:30
A. Ritual	
B. Education	
C. Hillel	
VIII. Second Vice President	9:30 - 9:45
A. Finance Committee	
B. Endowment Committee	
IX. Third Vice President	9:45 - 10:00
A. Membership	
B. Social Action	
C. Youth	
D. Outreach	
X. Fourth Vice President	10:00 - 10:15
A. House and Grounds - Sanctuary Speakers	
XIII. Rabbi	10:15 - 10:30
XIV. Old Business	10:30
XV. New Business	10:45
XVI. Next Meeting	
XVII. Adjournment	

Committees: Checklist for Committee Chairs

Rabbi Elyse Wechterman

The role of the committee chair is 20 percent doing the work of the committee and 80 percent managing the committee.

- Be involved in the life of the synagogue; be visible at functions pertaining to committee.
- Schedule meetings for the year—committees may meet more or less often, but they must meet regularly.
- Review mandate from board and set yearly goals and strategy accordingly.
- Circulate list of all committee members to assist communication.
- Set meeting agendas with time allotments and distribute one week before meeting. (E-mail works well for this.)
- Stick to the agenda in order to create an upbeat, productive, and positive experience.
- Recruit new members and volunteers: Use the recruitment systems set up by the board and follow through with personal phone calls. Keep an eye on committee diversity.
- Most committees work best with between five and eight members.
- Recruit and train successor as chair starting on day one.
- Committee chairs should create conditions for success, give members autonomy, allow them to make decisions within mandates, create a safe atmosphere for asking questions, and help them to develop expertise and to become empowered.
- Begin meetings with brief Torah study to keep the learning and sacred element in the work.
- Committee chairs should submit reports to their board liaison (written or oral) in advance of all board meetings. There should also be monthly updates on the progress of a committee.
- Follow all congregational policies for meetings (*kashrut*, Torah study, etc).
- Hold committee members accountable with gentle and kind reminders. If you see that a task is being neglected, offer help, a co-chair or partner in the task, and, finally, offer to relieve a member of the task before it crashes.
- Make it enjoyable, fulfilling, rewarding. Think of how precious your own time is and work to create an environment and set of tasks that are worthy of people giving of their time.
- Ask for help.

Committees: Documentation

Houston Reconstructionist Havurah

The purpose of this document is to help committee chairs and members to be organized and effective in their work. For more information on how to use this document, see the introduction to this section.

Committee:

Chair:

Responsibilities:

Members:

Additional contacts and resources:
(e.g., JRF regional director)

Events and programs sponsored by the committee:

(Continued on next page)

Budget:

Executive Liaison:

Interfaces with other committees:

(Describe with whom and how your committee interacts.)

Committee Goals: Where are we going?

Committee Strategies: How will we get there?

Committee Outcomes: How will we know we are there?

Chapter Seven: Meetings

The work of the congregation relies heavily on the effectiveness of meetings. Unlike prayer services or adult education classes, meetings can take on the air of the mundane and secular, if not the painful and boring. However, meetings need not be the one area of congregational life where fun, joy, excitement, and the sacred are absent.

When thinking about how to stimulate meeting attendance, consider the following points:

- Have we chosen the best meeting time?
- Have we made the best choice of meeting place?
- Did the meeting notice include all the relevant details and was it sent out well in advance?
- Did we send out a meeting agenda?
- Is a record of attendance kept?
- Is there systematic follow-up when members are absent?
- How do we make our members feel needed and important?
- Does the meeting have an educational component?
- Does it celebrate recent successes?
- Was the agenda varied?

As you study the documents about meetings, consider the following questions:

- How can our meetings run more smoothly and effectively?
- How are congregations incorporating Jewish values, rituals, and teachings into their board, committee, and congregational meetings?
- What are some principles of effective meeting facilitation?
- How do leaders deal with difficult members?
- To what extent can the Internet replace the need for meetings?
- How frequently should the community meet?
- How can we use the “Reconstructionist Decision-Making Process” (page 64) to help our most contentious meetings run more smoothly?

Meetings: Management Recommendations for Board and Committee Chairpersons

Planning

Planning is needed to define the purpose of a meeting. For example, is the meeting called to outline problem(s), determine solutions, or propose recommendations?

Pre-Meeting Thinking

Proper advance notice about the purpose of a meeting will enhance each participant's capacity to contribute.

The Cardinal Rule: Never attend a meeting without knowing what task you are asking the group to accomplish. Decide why you are calling a meeting:

- Give or exchange information;
- Create or develop ideas;
- Decide on goals or issues;
- Delegate work or authority;
- Share work or responsibility;
- Persuade, involve or co-opt;
- Establish or maintain relations;
- Inspire;
- Consult; and/or
- Socialize.

Agendas

Standard procedure involves preparing a written meeting agenda. If an agenda is circulated, all participants can understand the purpose of the meeting and their roles. A good agenda can be used to keep the group on track—in both subject and time allocated for the process.

Good agendas have a structure for each topic. This helps curtail rambling discussion. Such topics provide benchmarks for summary and consensus. Place as much information on the agenda as possible.

Agendas should also include proposed motions, and should indicate what will be a brainstorm, a report, a preliminary discussion, etc.

Try using questions instead of statements to elicit more participation. For example, how do we want to recruit new members this year? Place a general discussion time estimate next to each topic, so that everyone can help keep the meeting focused.

If possible, agendas should be drawn up at the end of each committee or board meeting. They should always be distributed prior to each meeting. Limit the agenda to four to five main points, plus a reasonable number of sub-points.

Head the agenda as "Tentative Agenda." One of a chairperson's first actions should be to ask for changes to agenda so that the group can come to a genuine procedural consensus before it delves into the details of problem solving.

Recording the proceeding and results

There should be a clear agreement that all important decisions of the group are to be recorded and distributed in the meeting minutes.

All action items, recommendations, or implementation steps agreed upon by the group need to be recorded. The specific assignments should be published as part of the meeting minutes. This simple act prevents needless and often rancorous misunderstandings about who has responsibility for which action items.

The recorder should not be the chairperson. The recorder's ability to articulate the consensus of the group (not what was said by everyone, but the main items that the group agreed upon) needs to be periodically reviewed.

Monitoring Interrupters

In a healthy discussion, there will always be a certain amount of spontaneous interruption. A certain level of interruption is permissible, but when it is the norm of the group or one person uses it too often or is too abrasive, the chairperson needs to take direct action with the person who is interrupting.

It does not matter if interruptions of one group member or another are motivated by genuine enthusiasm for one's comments or by rude and deliberate dominance tactics; the net effect is the same. For the person who gets stepped on, all interruptions are a "slap across the face." The person who interrupts effectively says, "Be silent, your ideas do not count. My ideas are superior."

Meetings: Making Them Work

Adat Shalom, Bethesda, MD

Meetings are a useful way to solve problems as a group, involve people in decision-making, exchange information, get new ideas, and generally conduct the business at hand. The following lists the elements of an effective meeting in any type of setting.

The following are some of the essential elements of a meeting. Each element is elaborated below:

- The agenda: The business that needs to be taken care of;
- The process: How the meeting will be conducted;
- Roles: Who is to do what during the meeting;
- Problem solving and decision-making: Who decides and how;
- The follow-through: What will get done, by whom, by when; and
- The environment: Where the meeting is taking place.

Elements of an effective meeting:

- Agenda:
 - It is clear that meeting as a group is the appropriate means of accomplishing the defined purpose;
 - The purpose of the meeting is clearly understood by the participants;
 - There is sufficient pre-meeting planning;
 - A tentative agenda is distributed ahead of time;
 - The written agenda with topic, process, time, and who is responsible for facilitating that section is agreed upon at the beginning of the meeting;
 - The agenda indicates a realistic time frame, and provides for the ability to adequately discuss topics and complete the agenda;
 - Participants and leader(s)/facilitator(s) are well-prepared;
 - There are agreed upon starting and ending times; and
 - Starting and ending times are adhered to.
- Process:
 - Attention is paid both to process (how) and to content (what);
 - The group agrees upon the process(es) for approaching a problem/discussion;
 - Any real issues are dealt with openly and honestly;

- The basic ground rules are presented and agreed upon (to avoid problems during the meeting) at the beginning of the meeting;
 - Participants listen as allies;
 - There are no side conversations;
 - Speakers make succinct statements and keep to the point;
 - Participants focus on issues, not on personalities;
 - Participants do not interrupt each other, nor is the meeting interrupted for another event;
 - It is okay to disagree, as long as it is done constructively;
 - All participants contribute to the conversations; and
 - The group works to create decisions that it can support.

- Roles:
 - Roles/functions are clearly understood. For instance, who facilitates the meeting? Who records information?
 - The facilitator contributes ideas but does not dominate;
 - The facilitator encourages participation;
 - Everyone participates; and
 - All share responsibilities for success of meeting.

- Problem-solving and decision-making:
 - There is a clear understanding of how decisions are made;
 - Key stakeholders are involved in the decision-making process;
 - Decision-makers should be people who will be affected by the decision and people with the power to block or assist the decision;
 - All key stakeholders are represented;
 - If consensus is used as a decision-making method, a fallback method is clearly understood; and
 - Adequate time is spent analyzing what is the real problem before selecting and implementing solutions.

- Follow-through:
 - Meeting ends by listing and reviewing next steps, by noting when they are due, and by repeating who is involved/responsible for accomplishing the tasks;
 - Notes are written and distributed; and
 - Meeting is evaluated.

- Environment:
 - Room is comfortable;
 - There are no interruptions;
 - Participant seating facilitates communication; and
 - There is an atmosphere of trust and support.

Meetings: Jewish Values-Based Decision-Making Process

Excerpted from the JRF's *Boundaries and Opportunities* report

The recommended Jewish values-based decision-making process includes:

1. The study of Jewish sources and practice;
2. The study of current information from the social and natural sciences;
3. A reflection on values;
4. An analysis of the impact of each possible decision on each affected party; and
5. A democratic and inclusive process maximizing the number of participants.

Traditional sources

The group should study texts about decision-making in Jewish tradition. During the rabbinic period, rabbis accepted responsibility for the interpretation of Torah. "It is not in Heaven", they declared, claiming for themselves the authority to explicate divine law.¹⁴

The principle of *mahloket shehe leshem shamayim*¹⁵ (controversy for the sake of heaven) appears in one of the earliest rabbinic sources, *Pirkei Avot* (Ethics of Our Ancestors), which teaches that communities always have struggled to define ritual and communal norms, as in the disputes of Shammai and Hillel. As long as the goal is to strengthen the community, the decision-making process is *mahloket shehe leshem shamayim* (controversy for the sake of heaven). Jewish communities have continually made decisions that reflected the needs of the times (*hora'at shaah*).

¹⁴ Babylonian Talmud, *Baba Metzia* 59b.

¹⁵ *Mahloket shehe leshem shamayim*: Controversy for the sake of heaven. A controversy for heaven's sake will have lasting value, but a controversy not for heaven's sake will not endure. "What is an example of a controversy for heaven's sake? The debates of Hillel and Shammai. What is an example of a controversy not for heaven's sake? The rebellion of Korah and his associates" (*Pirkei Avot* 5:17).

"A controversy that is for the sake of heaven will have its purpose upheld.' I heard the explanation of 'its purpose' to mean the end desired from the inquiry. 'A controversy that is for the sake of heaven': (is one where) the goal and sought-after end of this controversy is to reach the truth. 'That truth will be upheld,' as we say, 'from within the dispute the truth will emerge,' just as it became clear in the disputes of the houses of Hillel and Shammai that the law is according to the house of Hillel. 'A controversy that is not for the sake of heaven': (that is one) in which the sought-after goal is a desire to rule or a love of victory. 'This will not be upheld,' as we find in the dispute of Korah and his followers. The goal and end of their interest was the desire for honor and rulership, and the opposite was the outcome" (Commentary of Rabbi Ovadia of Bartenura to *Pirkei Avot* 5:17).

Rashi, the great 11th-century talmudic commentator, uses the principle of *eylu ve'eylu divrey elohim hayim* (these as well as these are the words of the living God)¹⁶ to support the right of Jewish communities to make decisions reflecting changing circumstances.

Abraham Isaac Kook, the first Ashkenazi chief rabbi of modern Israel, applied the principle of *marbey shalom ba'olam* (increase peace in the world)¹⁷ to validate the complex considerations involved in the decision-making process. He advocated in *Orot hakodesh* that individuals achieve balance and clarify their positions according to their value and place.

Contemporary consideration of decision-making principles

As to contemporary sources: Reconstructionist decision-making depends on the close cooperation between rabbis and lay leadership. Rabbi David Teutsch, former president of the Reconstructionist Rabbinical College, has written that all an organization's members, including the rabbi, must be reminded that they are struggling to make decisions *leshem shamayim* (for the sake of heaven):

¹⁶ *Eyly veeyly divrey elohim hayim*: "These as well as those are the words of the living God. And one might say, 'These and those are the words of the living God'—sometimes one reason applies, and sometimes another reason, for the applicable reason changes even with a small change of circumstances" (Rashi on Babylonian Talmud, *Ketubot 57a*).

"R. Abiathar soon afterwards came across Elijah and said to him: 'What is the Holy One doing?' and he answered, 'God is discussing the question of the concubine in Gibe'a.' 'What does God say?' said Elijah: '(God says), My son Abiathar says so-and-so, and my son Jonathan says so-and-so.' Said R. Abiathar, 'Can there possibly be uncertainty in the mind of the Heavenly One?' Elijah replied: 'Both (answers) are the word of the living God'" (Babylonian Talmud, *Gittin 6b*).

¹⁷ *Marbey shalom ba'olam*: Increase peace in the world. "Rabbi Eleazar said in the name of Rabbi Hanina: The disciples of the wise increase peace in the world, as it says, And all your children shall be taught about God, and great shall be the peace of your children. Read not *banayikh* (your children) but *bonayikh* (your builders)" (Babylonian Talmud).

"Said Rabbi Eleazar in the name of Rabbi Hanina, 'There are those who err by thinking that world peace can only be built through unified opinions and understanding. And if that is so, when we see scholars investigating wisdom and Torah thoughts and through the inquiry increasing the number of aspects and approaches, we might think that this will lead to disputes and the opposite of peace. But in truth, it does not work this way, for true peace can only come about through the value of increasing peace. Increasing peace means that individuals balance all aspects and all approaches and clarify their positions according to their value, place and matter. And...when the truth of their wisdom is revealed in all of its dimensions, that only by means of collecting all of its parts and all of its details and all the opinions that appear different and all the divided subjects, only and precisely through them will the light of truth and justice be seen, and the perspective, fear and love of God and the light of true Torah'" (HaRav Kook, *Orot hakodesh* Vol. 1 pp. 330-331).

Conflicts and tensions...become amplified if there is a breakdown of listening skills in the decision-making process or if the professionals do not put enough time and energy into facilitating the dialogue in advance of meetings where decisions will be made....

I don't believe that a rabbi who fully develops and vigorously uses the interrelated skills needed to function as Jewish resource, teacher, and facilitator will suffer from an inability to move the organization on issues of importance. The organization will be powerfully influenced by where the rabbi stands. Furthermore, when the rabbi is fulfilling well the tasks needed by the organization but not demanding the right to make decisions, it is my experience that often the right to make a sensible mix of decisions is generally naturally and gracefully given....

We are in the business of teaching Torah... Teaching does not mean that our students will arrive precisely at our conclusions. But if we trust them, we know that as at Yavneh, once we are done teaching and discussing, it is up to them to cast their votes with the most learned voting last.¹⁸

¹⁸ "The Rabbinic Role in Organizational Decision Making," by David Teutsch, pp.7-8.

Chapter Eight: Interpersonal Relations

Effective congregational leadership and governance results in high-quality relationships among the lay leadership and staff. Identifying what is needed in the congregational system, the best person(s) to address the need, and how they will be supported is a method for developing a healthy congregational life. This method helps to avoid fault/blame scenarios and misunderstandings about the community's sacred mission.

Even in the most well functioning community, however, conflict is both inevitable and an opportunity for growth. Following, therefore, are two documents about conflict: the transcript from a conference call on conflict management in congregations (page 68); and a document on what may cause conflict, and the basics of how to resolve it (page 70).

The number and roles of staff members and whether or not they are needed full-time is dependent upon the size of the synagogue and the complexity of its programs. The number of staff members is also dependent on the level of volunteer participation in the synagogue system. Compensation for all staff members should be determined by the wage rate in the general employment market, the compensation offered by other Jewish organizations in the area, and the general standards suggested by the JRF. The board should establish an overall philosophy with regard to wages and benefits, making sure to take into consideration Jewish values and teachings in the decision-making process.

As you review the following documents, consider what problems or issues may be lying under the surface in your board, committees, or larger community.

Also keep the following elements in mind:

- The balance of power between the lay leadership and the professional staff;
- The importance of professional support staff confidentiality and discretion;
- Methods for better communication between lay leadership and staff;
- Professional job descriptions: their uses and importance;
- How to incorporate Jewish values into the management of professional staff, non-professional staff, and volunteers;
- The role of the rabbi in the congregation;
- The role of the executive director and other paid staff; and
- Ways to deal with conflicts between staff and lay leadership.

Interpersonal Relations: Conflict in Congregations

Transcribed from a teleconference with Rabbi Mordechai Liebling
for the Jewish Reconstructionist Federation

The goal of conflict management is to move disputes from conflict to creative tension, and to have this tension play itself out in the arena of values-based decision-making. We do this by putting personal issues on the table first so that we can work them through and then put them aside. Then, we define, prioritize, and discuss values, ideas and the "good of the community."

It is good to have a "code of conduct," a shared understanding of appropriate behavior in the congregation. (Congregational activities do, in fact, occur in public space.)

Congregations are communities—not families! We often save our worst behavior for families. Congregations that become characterized as families contain relationships among congregants that mimic sibling rivalries, or between congregant and rabbi that are more parent/child than professional or scholar/congregant. We therefore recommend that congregations talk about the differences between a family and a community and about expectations concerning behavior within the congregation.

Structure is important. The default (if there is no formalized structure) tends to be "family" structure and relations. Power tends to go to the loudest, most verbal and most aggressive members. Lack of structure impedes democracy and empowerment. Informality impedes intimacy, because power and the access to power are subtle. Rather than building a loving and caring community, a congregation without structure tends to become characterized by dysfunctional relations and behaviors.

There can be legitimate differences of values and needs. Not all differences can be bridged. "Unity at all costs" is not necessarily in the best interests of the community.

A warm, caring, loving community is possible even in "larger" communities. (Remember, in our context this usually means communities of more than 250 households. Even in much larger congregations, however, it is possible to build a warm, loving community.)

It is necessary to have a formalized, routinized orientation process for new community members. Joining a new congregation is joining a new culture.

Founding members need to be aware of the power they have, and need to consciously address the issue of turning power over to others. People who have put years into the congregation deserve respect and appreciation—but not power. Term limits are a good idea. Staggered terms are an even better idea. One way of addressing this potential problem—especially when it is only a potential problem—is to openly discuss, define, and articulate it.

In general, open discussion is good. Open, Jewish-values-based discussions are even better.

Interpersonal Relations: Managing Conflict in Organizations

JRF Department of Affiliate Services

Frequent contributors to organizational conflict:

- Competition for recognition/authority/rewards;
- Competition for existing resources;
- Differing perspectives on congregational needs by involvement level;
- Overlapping areas of responsibility or function;
- Differences in values and goals;
- Deficiencies in communication;
- Role conflict;
- Interpersonal differences and incompatibilities;
- Environmental stresses; and
- Differences in theology, philosophy, Jewish practice, etc.

Creative approaches to problem solving, from a values-based perspective:

- What is the nature of the conflict facing us?
- What might be done to solve the problem (generate all ideas without judging them)?
- What is the criteria set we will use to evaluate the solutions? Consider values, policies, standards, etc.
- What are the merits and possible outcomes of a chosen solution?
- How will we put into effect our chosen form of resolving conflict and keep accountable? (Who? What? When? Where? Why?)

Additional Notes:

- What's happening in your community is not always unique. You are not alone.
- The community cannot be everything to all people. Do not fall into the trap of avoiding conflict as a way of resolving it. You may lose some members in the short term, because of a particular decision made for the long-term health of the community.
- Try to picture what the situation would look like through someone else's eyes.
- Recognize that there are changes in the lifecycle of any community. Growth brings challenges, conflicts over changes in experience, and perception of a loss of intimacy.
- Sometimes the person presenting the problem is looking for a conflict to make others feel as poorly or as upset as they are. Watch out for this, and avoid getting pulled in.

- We need to ground relationships in what Martin Buber refers to as “I-Thou” interactions, not treating someone else as an “it”.
- Rabbi/Congregational roles: Conflicts may surface around issues surrounding rabbinic evaluation, especially if a survey is sent to the entire congregation, which may compromise the sacred relationship of rabbi and community. It is better to empower a smaller group to do this work, while encouraging communication on an ongoing level to the community about the process. For more detail, please refer to “The Rabbi/Congregational Relationship”, available through JRF.

For more information on understanding and dealing with differing personality traits, conflict resolution, and/or working effectively with others, see the conclusion of section “F” of JRF’s *A Sacred Trust* workbook.

Chapter Nine: Documents

Rabbi Shawn Israel Zevit and Rabbi Yohanna Kinberg

Throughout Jewish religious civilization, the Torah itself and documents like the *ketubah* have served as guides for regulating interpersonal and communal processes. These documents, like those that will be addressed in this section, serve as written representations of a covenantal relationship. For, within the Jewish tradition, it is the concept of covenant, or *brit*, that binds us together. We are in a covenantal relationship both with the Divine and with each other. Our documents reflect our commitment to our relationships and the ideals and values that we strive to embody in our relationships with one another.

The truth is that mutually accepted and lived values, not only documents, are what govern our lives. Documents reflect the end result of lengthy and dynamic processes of communal decision-making and values clarification. Documents codify expected norms of behavior, communal priorities, procedures, and practices.

Each member of your board or committee should have, in one notebook, a variety of congregational documents (see pages 72-74 for a list of what they are). Some of the documents that are important to any board, committee, or congregation include:

Mission/Vision Statements

Mission and vision statements are the articulation of the collectively shared values and goals of a given community. A mission or vision statement is an ideal and unique image of the future. The more the vision statement elicits emotions, the more it embodies a powerful vision.

Consider these questions:

- What is the role of the mission statement in communal governance?
- How often is your community's mission statement revised? How often should it be revised?
- Where are mission statements "published" (synagogue brochure, in preamble to bylaws, policy manual, etc.)?
- How can a mission statement be used as a tool for values clarification and decision-making?
- How can the language of these documents be continually reinforced in the life of the community?

Bylaws

Bylaws, which govern a community, do not exist separate from values and ethics. Laws are institutionalized values. Therefore, it is vital that the bylaws of a congregation reflect the sacred intent of the community and its articulated values, as well as the necessary legal requirements.

Perhaps it is time to review your own community's bylaws, and have a lawyer do so, as well. If applicable, also have an administrator or a member of the board read these documents. Are they up-to-date? Have the same people read the basic statute governing the functions of the synagogue, since bylaws are affected by civil law in your respective area. Are these statutes congruent with your community's bylaws?

Other questions to consider include:

- How is the issue of membership privileges addressed in your community's bylaws?
- How do the bylaws address issues such as the termination of membership privileges or the termination of services of a staff member or the rabbi?
- What are the basic components of congregational bylaws?
- How can Jewish value concepts and terminology be used in these documents? What provisions can be used that reflect Reconstructionist and Jewish values?

For more information on mission/vision statements and bylaws, see "*A Sacred Trust*" workbook, section D.

Minutes

The minutes of board and committee meetings provide very useful congregational documents. Minutes are written to document the day-to-day operations of the congregation, including its programs, activities, religious events, etc., and to create for the community a sense of organizational history. Minutes are also written for the purpose of reminding and informing everyone about what transpired, and to inform a historian of the process of decision-making.

As a group, review the minutes from previous years' board meetings. Discuss: How is your community history kept? If it is primarily transmitted orally, should someone begin to write it down? How are documents, newsletters, or promotional materials preserved? What are your community's most important guidelines and policies?

Guidelines and Policies

Growing out of the mission and bylaws are the articulated policies and guidelines of the board, in concert with the rabbi and the membership in general. Issues may be generated by members, or they may be identified by the leadership and the staff. Guidelines and policies of any community, adopted by the board and then by the congregation as a whole, should be the product of a process that includes communal study of traditional sources and subsequent in-depth special study by topical subgroups and committees.

Subgroups are empowered to formulate draft statements of principles and more detailed guidelines. Members are then invited before and after this process to provide input into these guidelines throughout the process (which may take a year or a number of years, as in our movement-wide commissions).¹⁹

A sample of various policies and guidelines in Reconstructionist congregations is available in JRF's "Exploring Reconstructionism" Leadership Resource Guide.

¹⁹ See the Reconstructionist movement's various papers on homosexuality, the role of the non-Jew in the synagogue, disabilities, the rabbi-congregational relationship, exploring Judaism, etc.

Chapter Ten: Terms, Transition, and Timing

From an on-line JRF Leadership Discussion

Responses to the following question come from an online JRF leadership discussion. Use them as a springboard for your own board orientation, talking about: How does our congregation handle transitions between boards? How long can a board member remain on the board? What can we do better (if anything)?

Question:

Our congregation is looking for information from other congregations about when their officers and board of directors begin their terms of office. Currently, our board members begin their terms in August, a time when many members and mentors are away. We have discussed the possibility of beginning the terms of office after Simhat Torah, and we wonder what other congregations do.

Answers

We have our fiscal year from July 1 to June 30. Our board terms are for two years, beginning and ending on the same days as our fiscal calendar (a fiscal board, I guess). We have a one day, or two half-day, retreat(s) in July or August to integrate the old board and new. We stagger the terms so half the board remains each year. I think that beginning the board year when your members are around makes more sense. The key is to set up a pattern that is easy to follow and replicable from year to year once it is established (SC, Ner Shalom, Cotati, CA).

At our congregation, the officers of the congregation begin their terms with the beginning of the fiscal year. Since the board has fiduciary responsibilities, the term of office fits the fiscal year. For us, the fiscal year is from July 1 until June 30. The problem of vacations interfering with board business during July and August is real, but one has to learn to flow with it and do some early planning (JC, Mishkan Torah, Greenbelt, MD).

We begin our terms of office in early June immediately following our annual meeting and elections. We usually have a turnover of only one-third of our board members. We follow-up with a board orientation later that week, if possible. Then, later in June or early July, we have a board retreat to help us set goals. So far, this schedule works pretty well, although it is hard to find a date for the retreat that works for the majority. We are always looking for ways to fine-tune the process (SS, Congregation Agudas Achim, Attleboro, MA).

Board and officers' terms start on July 1. They are officially elected at the annual congregational meeting, held in June. The newly constituted board doesn't have its first meeting until September, but the officers' executive meetings take place all summer, which gives them prep time for the High Holy Days (VP, Bet Am Shalom, White Plains, NY).

At the Jewish Reconstructionist Congregation in Evanston, we transition our directors and officers at a joint meeting held in mid-June. The meeting is held just prior to the beginning of our fiscal year on July 1 and a month after the meeting at which the next year's budget is approved. Both the outgoing board and the incoming board are invited to the joint meeting. (Since most board members serve three-year terms, there is a two-thirds overlap.)

The outgoing president (if his or her two-year term is ending) conducts the first half of the meeting, usually finishing some old business, at which only the outgoing board can vote. The president then turns over the gavel to the new president, who presides over more of an orientation/getting-to-know-you type meeting.

Typically, the board won't meet during July and August. During that slow time, the executive committee (composed of the eleven officers who sit on the twenty-two-person board) can address any emergency matters. The summer hiatus also gives the new president some time to get situated, and to work with the rabbi and executive director to plan the year's agenda before the press of the High Holy Days. This seems to work okay. You know what they say: "timing's everything" (KR, JRC, Evanston, IL).

We hold elections in May/June. Officers' terms are concurrent with the fiscal year. Terms are for two years and are staggered so we have continuity on the executive committee and board (SG, Cleveland Havurah).

We have board terms (two years) and officer terms (one year) that begin in April. April works well for us because it gives us time to orient our new board before people leave for summer vacations and before we go into high gear for High Holiday prep for the congregation. Our budget year starts Jan 1, as do employee reviews and contracts, which also seems to work without problem (RZ, Columbia Jewish Congregation, MD).

At this point, we have a semi-annual meeting in May or early June at the latest when we elect officers after having worked on the slate in the weeks prior. There is an installation, usually at a Friday Shabbat service, though we have had summer parties, or picnics, or brunches where officers were installed. The board then has a chance to get going in advance of an influx of membership inquiries and the High Holidays. This works so far, but we are finding we must be more attentive to the bylaws and structure to be sure term limits are honored and newer board members are mentored toward more leadership responsibility (AY, Beth Samuel, Ambridge, PA).

Our fiscal year is July 1 through June 30. We have two regular congregation meetings a year, one in November, when we vote in our new board, and one in May, when we approve the budget for the next fiscal year. (New board members are invited to come to December's board meeting, and are given an orientation in January before their first official meeting.)

The new board members begin their term of office on January 1. Although this seems odd, compared to our fiscal year, it really works in terms of the time and energy people are available, given this is a voluntary position. Our summers in Eugene are such that while subcommittees are still hard at work, many people are gone on vacation. The same is true between Thanksgiving and the New Year. Therefore, the majority of our workload takes place between January and June, and then the rest between the High Holidays and the secular holidays. So while it seems odd, it has really worked for us! (MS, Temple Beth Israel, Eugene, OR).

Chapter Eleven: Planning

Rabbi Shawn Israel Zevit and Rabbi Yohanna Kinberg

While planning is one of the most important functions in synagogue life, it is one that is rarely addressed systematically and in a way that promotes community building. Once we understand our values and have a mission statement that embodies those values, we should then look to create a plan to fulfill that mission.

The planning process is the framework within which policies are formed, budget and fundraising goals are set, and staff needs are projected. Planning processes examine means and resources, and focus on the kinds of programs and services the congregation will be called upon to provide in the future. They necessitate a change in perspective on the part of the community. A great deal of trust is required in order for the planning process to be successful.

Planning is vital to managing growth. Most synagogue communities want to grow in ways that do not compromise their ability to live up to their reasons for coming together to form a Jewish community. For, while growth brings greater diversity, additional resources, and more participation into the community, it also necessitates change, challenges intimacy, and strains preexisting capacities. Many Reconstructionist communities struggle with growth management. Planning is the most effective tool in reducing the stress, fear, and uncertainty when dealing with issues of growth.

The planning process will not take half a year. It is an ongoing commitment. The planning process is not an insurance against crisis, nor is it a guarantee. Planning for change means working with the variables in congregational life and anticipating future needs or goals. It means making things happen *for* the congregation instead of letting things happen *to* the congregation.

Without an ongoing planning process that is accepted and understood by the leadership, the synagogue tends to govern itself through “crisis management.” Thus, decisions and policies are made in a time crunch and are often spurred by “real life” crises. The community is not afforded the opportunity to take time to make decisions or to think of issues in the abstract instead of the personal.

The planning process incorporates more than establishing a committee for its development. Ideally, the following steps should be discussed:

- Establishing a pre-planning stage;
- Completing a self-evaluation: a description of the current status of the synagogue and an evaluation of the status;
- Developing of the plan in a group or committee that represents age, class, gender, family structure, length of membership, and other membership variables;
- Implementing the plan; and
- Conducting an ongoing review of the plan's effectiveness with measurable goals.

At your board orientation, as you talk about planning, consider the following issues:

- The life cycle stage of the synagogue;
- Stages of congregational growth;
- The definition of a strategic planning process;
- How to begin a strategic planning process;
- How to execute a strategic planning process;
- Who to include on a strategic planning committee; and
- How to employ normative, in addition to strategic, planning processes.

Planning should be vision driven, based on the mission of the community and supported by covenantal governing documents. In a participatory democratic culture, the community simultaneously shapes and reflects its values. Planning should have its foundation and take into consideration these dynamics.

For more information on planning, see "*A Sacred Trust*" workbook, section G.

Chapter Twelve: Last Thoughts

The end of a board orientation or training is, for many of the participants, the beginning of their leadership tenure in their community. By taking time at the end to remind people of the holiness of their work and the generosity their presence represents, we can tie leadership and board work back into the endeavor of holy community.

Some options:

- Invite people to share one thing they learned from the day that they will take with them.
- Discuss: “Where do we go from here?” Make a list of all the changes proposed during the orientation. Prioritize the list—there are only so many things that one board can get done in one year. Assign a board member to take responsibility for each of the changes. Break down each of the changes into its various parts. Make a due-date for the first part/draft/element of the project to be completed.
- Ask people to share an appreciation for the board and its members.
- End with a *niggun* or a chant (*Hinei Ma Tov* works well).
- End with *tefilat ha-derekh* (prayer for a journey).
- Say *motzi* and eat.
- Require board members to take turns reading announcements at services to increase the connection between board members and the congregation. Make a list of when each will read.

Appendix I: Synagogue Governance as a Sacred Trust

*From Reconstructionism Today Magazine*²⁰

Rabbi Shawn Israel Zevit



Rabbi Shawn Israel Zevit with participants in the May, 2001 *Sacred Trust* workshop.

In 1997, the Jewish Reconstructionist Federation (JRF) launched a series of innovative workshops to help affiliated communities clarify their mission and communicate about themselves and Reconstructionism to the larger Jewish community.

A Sacred Trust: Values, Jewish Communal Leadership, and Congregational Governance, the third of the workshops, was designed to be responsive to the wide range of governance structures in Reconstructionist communities. Many of these communities are seeing tremendous growth—increased staffing, more physical space, and more programs and services, generally—which requires an increase in funds, effective governance structures, skilled leadership, and staffing. As a result, we are now grappling with our own biases about authority and organizational structures while striving to maintain our fundamental communal values and cultures.

In the "Sacred Trust" workshops, study, effective listening, and open discussion helped bring forth the hard-earned wisdom of Reconstructionists, both lay and professional, about these matters.

We used text study to review the evolution of Jewish leadership models throughout history: *Kohanim* (priests), *Leviim* (Levites), the firstborn, the elders, *Anshei Knesset Ha-Gedola* (the "Great Men of the Assembly"), *Sanhedrin* (Council of Sages) and related courts; the *geonim* (leaders) of Palestine, the exilarchs of Babylonia; and, during the past three centuries, scholars, politicians, entrepreneurs, financiers, Hasidic rebbes, social activists, Zionist

²⁰ Excerpts available in other introductory sections of this manual

intellectuals, and so on.

From the beginning, religious and political authority were intimately connected in Jewish life, and communal leadership assumed two overlapping but distinct forms. On the one hand were religious judges or rabbis, whose expertise in Torah gave them special authority. On the other hand, communal control over non-halakhic public affairs devolved upon the “elders” whose authority derived from their age, wealth, family lineage, gender, and personal qualities. They maintained public order, collected taxes for the local authorities and for the support of Jewish social services, and served as liaisons to the Christian or Moslem rulers. By the 13th century, Jewish communities had so grown in size and complexity that these leadership roles were quite distinct, and a paid rabbinate gradually emerged.

Rabbi Moshe Idel and Mortimer Ostow note that even when Jewish authority was exercised collectively by the rabbinical judges, *parnasim* (Jewish civil authorities) and elders, the community was not a democratic body but an oligarchy run by the consensus of the elite. Yet in most lands, it was a covenantal bond more than legal power that underlay the Jewish community board’s authority. In both Spain and Ashkenazi communities, Idel and Ostow write, the culture of leadership included: emphasis on Torah knowledge over aristocratic lineage, and on artisan and commercial trades over “court culture” and political connections; the subordination of communal leaders to the rule of the *bet din* (rabbinic court); demonstrated concern for the poor and the vulnerable; commitment to Jewish education at every level; and outspoken opposition to greed and excessive luxury.

From the 17th century on, Jewish leadership was often augmented by a measure of political power ceded by non-Jewish rulers. This included tax collection and greater control of business conduct (especially dealings with non-Jews), social behavior, and religious observance. Fines, imprisonment, pillory, and religiously sanctioned bans were used as tools of enforcement.

As modern Jewish life evolved from the 19th into the 21st century, Jews have experimented with different models of leadership and governance. Yet certain patterns internalized throughout the centuries can make contemporary leadership of Jewish groups a difficult task. Jews have relied heavily on their leaders’ intervention with outside authorities and have often seen their leaders killed by, or forced to cooperate with, the most oppressive of those authorities. This has contributed to anxiety about “getting it right” at all times, and about the real or perceived dire consequences of our leaders’ actions. Blaming authority, scapegoating, externalizing or denying problems, and focusing on marginal issues to avoid confronting major ones, are some common behaviors that have made leadership challenging in Jewish communal life.

The need to support and affirm leaders, not only to criticize them, is crucial to the overall health of a communal system. Both leaders and the community must encourage honesty, creativity, and the maintenance of healthy boundaries and structures that help avoid burnout and ineffectiveness. Leaders need to understand the defense mechanisms of congregational systems and help people learn from their resistance and reactivity. Leaders must also develop their own support systems inside and outside the community.

The *Sacred Trust* workshop built on perspectives offered in the recent report of the Reconstructionist Commission on the Role of the Rabbi. We advocated a “systems theory” approach to governance that examines the totality of the congregational system rather than looking only at individual roles and functions. From a systems perspective, while specific individuals may be responsible for exercising leadership in a community, leadership is an activity of the congregational system rather than the job of only one person. This concept broadens the traditional boundaries for leadership roles. Systems theory is fundamentally similar to what Mordecai Kaplan called the principle of “organic reciprocity”—that the whole acts upon the part, and the part in turn acts upon the whole. For Kaplan, this principle mandates mutual responsibility and ethical conduct. “What has been said of words in relation to their context,” he wrote in *The Future of the American Jew*, “is true of human beings in relation to their communities; they are not ‘pebbles in juxtaposition’; they have only a communal existence; the meaning of each interpenetrates the others.”

In Reconstructionist communities, when we ask, “Who is a leader?” we are asking not only about personality traits, but about values that inform feelings, thoughts, and actions. We hope for leaders who hold and embody values that we respect. In contrast to the traditional leader who influences a community to follow his or her vision, a Reconstructionist leader is also defined by how he or she helps a community grow, face its problems, and develop solutions. Reconstructionist leaders, in other words, help elicit and manage a community’s vision, as well as inspire it. Mordecai Kaplan put it this way (in *The Future of the American Jew*): “Governance which is based not merely upon the consent, but upon the active participation of the governed, is in a position to verify the deepest insight of religion that every human being is created ‘*b’tzelem Elohim*,’ in the image of God.”

The governing documents of congregational life were an important topic of focus in the *Sacred Trust* workshop. These documents reflect dynamic processes of communal decision-making and values clarification. They are, in essence, sacred texts that represent a covenantal relationship.

Mission/vision statements are the articulation of the shared values and goals of

a community. A mission or vision statement is an ideal and unique image of the future. The more your articulated goals elicit and reflect emotional commitment, the more they are likely to qualify as part of your mission/vision.

Bylaws are documents by which a community is governed. Laws are institutionalized values. It is vital that the bylaws of a congregation reflect the sacred intent of the community and all of its articulated values, as well as necessary legal requirements. Among the questions we examined in the workshop were: How are Jewish values and terminology reflected in bylaws?

Minutes of board and committee meetings are very useful congregational documents that help create day-to-day continuity for a community and create a sense of organizational history. The ideal minute book is one with prenumbered pages, none of which can be replaced or substituted.

Finally, growing out of the mission statement and bylaws come the articulated *policies and guidelines* of the board. These should be developed in concert with the rabbi and the membership in general. Guidelines and policies should be the product of a process that includes communal study of traditional sources and special, intensive study by topical subgroups and committees. Subgroups are empowered to formulate draft statements of principles and more detailed guidelines. Members are invited to provide input throughout the process, which may take a year or a number of years — as in our movement-wide commissions.

The next step in the *Sacred Trust* workshop was to look at how the documents we claim to live by are actually embraced by the community in making decisions and meeting change. This brought us to governance structures.

The ultimate governing authority in every congregation is the membership. The synagogue board and committees are comprised of individuals from the membership who are elected (or volunteer) to fulfill and preserve the stated goals and values of the community. Along with the paid professional staff, these governance bodies sustain the life and vitality of the synagogue. At the *Sacred Trust* workshop, we examined a wide range of Reconstructionist governance structures. We noted that service on the board should also represent an opportunity to be spiritually nurtured and to grow in leadership abilities. Boards should not generate policies or micromanage committees; policies should come from committees to the board. The board's real work is to ensure that the vision of the congregation is being fulfilled.

Committees in congregational life ideally function like staff members in non-profit organizations: Once they have their mandates, they do not need to go back to the board unless they are asking for money, making interim reports or recommendations, or seeking additional information. A committee has relative

autonomy as long as it is following congregational policies and acting within its mandate.

All of this work relies heavily on the effectiveness of meetings, which are often viewed as a “necessary evil.” Unlike prayer services or adult education classes, meetings too often take on the air of the mundane and the secular, if not the painful and boring. Why should meetings be the one area of congregational life in which fun, joy, excitement, and a sense of the sacred are absent?

The effectiveness of congregational leadership and governance is often revealed most clearly in the relationship between lay leaders and professional and non-professional staff. Among the issues that our workshop explored, using theoretical articles and documents gathered from JRF congregations, were: the balance of power between lay and professional leaders; the importance of confidentiality, discretion, and effective communication; the use of job descriptions; how to incorporate Jewish values into the management of staff and volunteers; the roles of the rabbi, executive director, and other paid staff in the congregation; and how to deal with conflict between staff and lay leadership.

Finally, we spent a good deal of time discussing the long-term planning process, through which communities prepare for growth and change and overcome a “crisis management” mentality. Planning for change requires consideration of the variables in congregational life and anticipation of future needs or goals. It means making things happen for the congregation, instead of letting things happen to the congregation.

Most synagogue communities want to grow in ways that do not compromise or sacrifice the reasons and desires for coming together to form a Jewish community. Growth brings into the community greater diversity, additional resources, and more participation, but it also challenges intimacy and strains capacity. Many Reconstructionist communities struggle with growth management. Planning can be an effective antidote to the stress, fear, and uncertainty that accompany issues of growth. (Even when a community desires to remain small, change is still an ongoing process and planning is crucial.)

The planning process involves more than establishing a committee. Ideally, the following steps should be discussed: a process of self-evaluation; development of the plan in a group or committee that represents the diversity of the community in age, class, gender, family structure, length of membership, and other variables; implementation of the plan; and an ongoing review of the plan’s effectiveness, with measurable goals.

Planning should be vision driven, based on the mission of the community and supported by covenantal governing documents. In a participatory, democratic

culture, the community simultaneously shapes and is shaped by its values.

The amount of commitment, energy, and time that participants gave to the JRF leadership workshops is awe-inspiring. More than 70 percent of our affiliated communities have participated in at least one workshop, many in more than one of the series, and some individuals have been to all three. Many communities have purchased additional resource books from the JRF to aid them in their approaches to conscious growth and financial, leadership, and governance issues. Some communities have begun budgeting to send as many representatives as possible as part of their own commitment to leadership development. This level of participation deserves deep appreciation.

The process we go through to realize a common vision, and the Source we connect with along the way, have profound impact on where we end up. The conscious attempt to integrate process and practical outcome is what drives the programs and resources that the JRF is developing — and what attracted more than 350 people to take the time together to examine ways of making our Reconstructionist communities as healthy and as holy as they can be.

Appendix II: Sample board training agendas

One-day Sample Retreat Agenda

Rabbi Elyse Wechterman

This outline is a model for a one-day retreat for a new board. (Remember, all boards are new boards each time they are elected – even if only one member changes.) It is best done on a Sunday at a location other than the synagogue. It is designed to be facilitated by an outside professional, but can be facilitated by a senior member of the community with skills and experience – preferably not a current board member.

On the pages following this hypothetical agenda are various examples of actual orientations implemented by JRF congregations.

- I. Breakfast and Coffee
- II. Introduction:
 - A. D'var Torah from Rabbi or senior member
 - B. Brief review of congregation's history from senior member
 - C. Identify, record, and post congregation's recent accomplishments.
- III. Board member responsibilities:
 - A. Identify reasons you stepped into communal leadership.
 - a. Record and note similarities, differences.
 - b. Point out that there are many reasons that people join a synagogue board and all are valid.
 - B. Hand out or review samples of "board member responsibilities" and suggest the creation of a similar document for this group.
 - a. Divide into *hevruta* (study pairs) and assign each pair one version to review, noting what they like/don't like, what would be appropriate for this community/what not, etc.
 - b. Report back, allowing for discussion until consensus is apparent around most issues. (If an issue arises that needs further discussion, table it for now.)
 - c. Create a committee that will draft something to be presented at the next board meeting and adopted as a statement of board-member roles and responsibilities.
- IV. Lunch

- V. Board structure
 - A. Map out congregational board structure using the documents of the community or the charts from *A Sacred Trust* workbook, sections E and F. Follow an issue through the process. Remember that:
 - a. Work is done in committees.
 - b. Executive committee is responsible for functioning of committees.
 - c. Board determines committee goals and budget—committee implements as it sees fit.
 - B. Break into committees/committee areas and write up:
 - a. Committee's goals and mission,
 - b. Executive committee contact, and
 - c. Other committees with which it needs to interact.
 - C. Report back
- VI. Close
 - A. Review reasons for being here.
 - B. Text study on leadership.
 - C. Have people express what they learned.

Houston Reconstructionist Havurah

Member-Facilitated Board Orientation

Ashrei—What is going well

Review of handouts

Overview of board responsibilities and expectations

Review of director job descriptions

Bibliodrama—At the Reed Sea [Exploring New Directions in Leadership]

Current HRH positives and challenges

Short-term goal setting for board

Calendar of board activities

Volunteer leadership development and management

Communication exercises

Celebration and appreciation

Prayer for leaders

Kehilat HaNahar

External Consultant-Facilitated Board Orientation

AGENDA

Assembly

12:30

P.M.

Opening Remarks	12:30-12:35 P.M.
Welcome and D'var Torah	12:35-12:40 P.M.
Review of Day	12:40-12:45 P.M.
Introduction of JRF Consultant	12:45-12:50 P.M.
Hello From the Jewish Reconstructionist Federation	12:50-1:00 P.M.
Open Retreat Discussion #1: "This Olde House is Made of..." Facilitator: _____	
Discussion of KHN Governance	1:00-2:45 P.M.
Open Retreat Discussion #2: "Outreach: Attracting and Retaining Members" Facilitator: _____	3:00-4:15 P.M.
Open Retreat Discussion #3: "In-reach: Participation—Getting Our Members Involved" Facilitator: _____	4:30-5:45 P.M.
Where Do We Go From Here? Facilitators: _____	5:45-6:30 P.M.

DINNER

Dor Hadash

Professionally facilitated (by congregational non-board member)
Board Orientation

Continental breakfast/gathering	8:45 - 9:15
Introductions	9:15 - 9:20
Congregational leadership in its historical and religious context Text study and discussion	9:20 - 9:50
Introductions to the rest of the day: Facilitator _____	9:50-9:55
Board roles and responsibilities discussion Handout of the 10 main roles and responsibilities	9:55 - 10:20
Brainstorm: Additional responsibilities and roles for leadership in Dor Hadash; leadership in religious community	10:20 - 10:40
Break	10:40 - 10:50
Strength assessment: Break into groups of two or three Take turns answering the following question: "The 4 roles and responsibility areas in which I have the most to offer the congregation are..."	10:50 - 11:05
Report out to the full group	11:05 - 11:35

Focus question/small group work	11:35 - 12:10
<i>It is five years from now and JRF is here to give this leadership group an award for being the most effective congregational leadership group in the country. They ask to see some of the accomplishments in which you take the most pride. What do you show them?</i>	
Lunch	12:10 - 12:40
Focus question: cluster response/full group	12:40 - 1:25
Break	1:25 - 1:35
Work planning: small groups/work plans by quarter	1:35 - 2:05
Identify your one-year celebration event or benchmark (based on focus question)	
Identify key steps by quarter	
Small group reports	2:20 - 2:35
Prioritizing next steps, assignments	2:35 - 3:00

Appendix III: Sanctifying the Sacred Trust A Reconstructionist Guide to Board Installation Ceremonies

Rabbi Elyse Wechterman and Rabbi Melissa Klein

The Jerusalem Talmud teaches that one who engages in the needs of the community is as one who studies Torah. According to tradition, Torah study enables blessing and holiness to enter the world and is a mitzvah of the highest degree. However, whereas the tradition provides us with many ways to celebrate the study of Torah—including a blessing for Torah study and ceremonies for the beginning and ending of a program of study—little is said about how to acknowledge the holiness of the act of community leadership.

Many of our congregations recognize the importance of publicly acknowledging the dedication and generosity of those who build our communities by contributing their time and expertise. We at JRF are often called upon to help communities create such acknowledgement and recognition and we have had the profound honor of being present at some remarkable moments of transition and celebration in our affiliated congregations.

The process of creating and experiencing a ceremony to honor and install leaders can be a powerful catalyst for community building. Involving the membership in such an event can help the community to reiterate and reconnect with its highest goals and values. Leadership can then become a true honor, not the burden that it too often becomes.

The following is designed as a resource for communities creating ceremonies to honor their leaders. For further resources on communal leadership and congregational governance, please refer to the *Sacred Trust Workbook* available from the JRF. Because this booklet is a new resource, we are interested to hear how you used it and about the role of board installations in your synagogue.

Goals of Installation

There are many reasons to plan such a ceremony. Clarifying the goals beforehand among the participants will help prevent any confusion or discomfort during or after the ritual. Some board meeting time should be devoted to this discussion. If outgoing board members or others are to be honored, be sure to solicit their input.

Some of the goals of an installation ceremony are to:

- Welcome new board members,
- Install (empower) the leaders of the community,
- Provide an opportunity for new leaders to share their vision for the community,
- Boost the energy of a congregation or board as it enters into its work,
- Honor outgoing members for their service,
- Mark a transition for the community,
- Publicize the value of and appreciation for community service that the congregation holds,
- Celebrate, and
- Rededicate the community to its mission or identity.

When to plan such a ceremony

There are many possibilities for scheduling this ceremony. Congregations that have annual membership meetings might choose this time to install their leadership. Other opportunities are the first Shabbat after a summer break, during Rosh Hashanah services, at a special scholar-in-residence weekend or at an open and well-publicized board meeting. The ceremony can be part of a regular worship service or done as a special and unique event of its own. What is important is that the ceremony take place at a time when a large percentage of the membership can be expected to come and participate.

Length and location of the ceremony

As in all rituals, brevity is a key. Rituals of twenty minutes or less can be very powerful and will avoid the risk of losing the interest of the community. If the ceremony is to take place during a service when the Torah is read, a short ritual during or after the Torah reading is most appropriate. On a Friday night, this ceremony might take the place of a sermon or *d'var torah*. At a membership meeting, the ceremony would work nicely after business is concluded and before a celebration.

Seder (order) of the ceremony:

- Introduction
- Blessing/thank you to outgoing board members

- Blessing/charge to new and continuing members of the board
- President's message
- Congregational blessing to the leadership
- Closing

The Ceremony

Introduction

Rabbi: We are gathered here this evening, as part of our _____, to acknowledge our leadership, to express appreciation for outgoing board members who have put in countless hours of work in building this community, and to welcome new board members. The Jerusalem Talmud teaches that one who engages in the needs of the community is as one who studies Torah. Our leaders enable this holy community to carry on its work, to be a sanctuary for each of us as we move through the moments of celebration and loss in our lives, to be a community that spreads our light into the world.

Blessing/ thank you to outgoing board members

Rabbi or respected member of the community: We begin this ceremony by thanking our outgoing board members. I would like to ask all of the board members who are completing their term of service to please join me on the *bimah*.

(Board members stand and face the congregation) Let's take a moment to appreciate all of the hard work each of these individuals has contributed, work that they did as a labor of love.

After a moment of silence, leader recites each person's name, speaks briefly about his or her contributions, and then presents the gifts.

Leader: Our community has chosen to give the gift of a Tanakh, or Jewish Bible, to each of our outgoing members. The Tanakh has been inscribed with their names and the dates of their board service as a token of our appreciation for their dedication. We choose a Bible to mark that they will each now have more time to study Torah—this is not an end to their involvement in the community, but rather a transition so they can participate in different aspects of what the community has to offer. *(Outgoing board members return to their seats.)*

Blessing/ charge to new and continuing members of the board

Rabbi: We now invite new and continuing members of the board to the *bimah*.
(*Rabbi introduces each board member by name and position and says a sentence or two about each.*)

Please join me in reading the installation prayer found in your handout.

Congregation: We ask Your blessings, O God, upon those who have been elected to lead and serve our congregation.

As they perform their duties, keep them ever mindful of the high purposes to which they and we are dedicated.

Help them to be faithful heirs to those who have preceded us, and worthy predecessors of those who will yet follow.

May their actions reflect strength and wisdom, and bear testimony to the great heritage which they represent.

As our newly elected officers strive to achieve their goals, may they help to keep us, too, faithful to our tasks.

Grant our leaders strength when they are weary, hope when they are discouraged, patience and perseverance when they face any obstacle.

Bless them, and those dear to them, with health of body, vigor of mind, and serenity of spirit.

May their labors reflect honor upon our congregation and our people, and may they thus bring glory to Your holy name. *Amen.*

New and continuing members of the board: In the presence of this congregation, I accept the honor and the responsibility conferred upon me. I pledge to serve our congregation to the best of my ability, and to uphold its sacred values with dignity and integrity.

I pledge my time and my energy to its needs and goals, and I will attempt to serve with vigor and to lead with humility.

I will strive to act in a manner that will bring honor to us all.

- *Siddur Hadash, The Prayer Book Press of Media Judaica, p.540*

Presentation of token of leadership to new board

Rabbi: Since we have been acknowledging the connection between Torah study and service to the community, we offer this beautiful silver *yad* to the new president. Our intention is that when _____ completes his/her term, s/he will pass the *yad* on to the next president. We invite the board to have this *yad* present at meetings, as a reminder of the holiness of our mission. (*Rabbi presents yad to president.*)

Our new and continuing board members will show their acceptance of their roles by reciting together our community's mission statement.

New board: We, the leaders of _____, rededicate ourselves to the ideals and values of our holy community. (*New board reads mission statement or statement of principles. All but the president take a seat.*)

President's message

President speaks of his or her vision for the community for 3-5 minutes.

Congregational blessing to the leadership

Congregation recites together: We offer our leaders a blessing: With the consent of our community, vibrant and struggling, in the presence of our Torah, rich with wisdom and insight, we ask that those we call to service bear this burden lightly, bringing honor not to themselves alone but to all who love and labor for this synagogue.

May your tenure of service be one of life and grace, achievement and success.
May you grow in wisdom and strengthen Jewish learning.
May you guide our efforts and guard our path.
May you grow in the intelligent exposition of our heritage and never fear the new traditions of our evolving people.
May the Source of Truth and Wisdom grant you clear vision, energy, spirit, and courage to carry forward the life of our synagogue with the blessing of us all.

As our ancestors received and transmitted the mantle of leadership, so do we now as they did throughout the generations, invoking their blessings upon each of you who now serve in the holy work of our community:

*Y'varechechem Adonai v'yishmerechem.
Ya'er Adonai panav eylechem vi-chunechem.
Yisah Adonai panav eylechem v'yasem lachem shalom.*

May the Source of Life bless you and protect you.
May God's light shine upon you with compassion.
May God's countenance shine upon you and bring you much *shalom*—wholeness and peace.
—Rabbi Leila Gal Berner

Closing

All sing a favorite song of the congregation's.

Hinei Ma Tov

Hinei ma tov u-ma na'im, shevet achim gam yachad.
Hinei ma tov u-ma na'im, shevet achyot gam yachad.
How good and lovely it is for brothers and sisters to be together!

And then

And then, and then, both men and women will be gentle.
And then, and then, both women and men will be strong.
And then all will be, so varied, rich and free
And everywhere will be called Eden once again.
And then . . . And then . . .
—by Margot Stein, adaptation of Judy Chicago's "Merger"

Possible additions to the board installation ceremony

- If the ceremony is part of a Shabbat or holiday service, board members might be invited to lead parts of the service.
- During a Torah service, board members might be invited to open and close the ark, carry the scroll, and have an *aliyah* with a special *misheberach*.
- The rabbi or a long-standing member of the community might be asked to give a special *d'var torah* on the importance of leadership or this transition for this community.
- If the congregation has a statement of principles, it might be read as part of the charge to new board members or as their pledge to the community.
- The accomplishments of the previous board and/or goals for the next year can be outlined from the *bimah* or handed out in a printed program for the ceremony.

Hiddur Mitzvah – enhancing the ceremony

- Serve food after the service, or plan a community pot-luck dinner.
- Pass on a symbolic item of Judaica—such as a *yad* or a *kiddush* cup—from one president to the next as a way to maintain continuity and tradition.
- Invite musicians to play following the ceremony.
- Design an invitation for the ceremony and send it out in advance.
- Design a program booklet with the names of all the outgoing and incoming board members, the order of the service, some of the readings and the community's statement of principles or mission statement.

Other ideas for gifts to outgoing board members

- | | |
|----------------------------------|---|
| • <i>Kiddush</i> cup | • <i>Siddur</i> |
| • <i>Tzedakah</i> box | • Art work |
| • Collection of Torah commentary | • Cook book |
| • Collection of stories | • Gift certificate to Reconstructionist Press |

Appendix IV: Reconstructionist Communities Respond to *A Sacred Trust*- Some New “Best Practices”

I had an executive committee meeting the night that I returned from LA and orally shared some of the highlights of the workshop. At our federation council meeting this past Tuesday, we began with the blessing you gave us, and I put our mission statement at the top of the agenda—practices that will continue at every meeting (SG, Bnai Havurah, Denver, CO).

* * * *

As a direct result of the workshop, we are putting together a booklet listing our committees and their responsibilities or “Job Description” (B, Dor Hadash, San Diego, CA).

* * * *

I shared the highlights of the day I attended with our board of directors. Some of the actions taken from the information I received at the workshop were to create a new non-board position in the synagogue called coordinator of volunteers in order to reach out to more congregants for support. In addition, it was agreed to have a more formal orientation for new board members. We have just hired a new office manager, so this will come in very handy. I also want to thank you for the workbook that you gave to me to give to our president. It will be available to our board members as needed, as well (JS, Malibu Jewish Center, CA).

* * * *

Thank you again for your thought-provoking and exciting leadership workshop. In response to your inquiry, so far I have written an article for our monthly bulletin describing Reconstructionist views of community, governance, and leadership as I understood them from our workshop and your materials. I also have been sounding the themes we learned at every decision-making opportunity, which has been many, since we are in the process of making many short- and long-term decisions for our congregation’s future. As a result of the workshop, for instance, we have revised our approach to some strategic planning by the board to include a series of “parlor meetings” and community workshops to discuss and obtain congregational input about our mission statement and programmatic and staffing goals. We also are making efforts to provide more information and education to the congregation around pending decisions in advance of congregational meetings at which votes will be taken. I already had responsibility for forming a committee to review and update our bylaws, and I will now do so with Reconstructionist principles—and some of the useful materials you provided—more firmly in mind. Still pending is a meeting with our rabbi, executive committee, and president to debrief what we did at the

workshop in a more organized and detailed manner (CS, Temple Beth Israel, Eugene, OR).

* * * *

Since *A Sacred Trust*, my co-participant and I have discussed many times the thought that “the ungoverned congregation is also a governed synagogue but one without direction and without a true voice.” In view of this, I have been talking with several of our fellow congregants about planning and governance. We now know we seek to improve our governance without losing the warmth and familial feeling that is our pervading atmosphere. I think that, like all of those attending, we will make the syllabus of the seminar a guide for our thinking process, not the model but a provocateur, just as intended. The responsibility of trying to make so many disparate thoughts (about the best way to the future) coalesce into a united direction is nearly overwhelming, but I will certainly give it my best shot. Thank you for giving us the ammunition to do this (JF, M’vakshe Derekh, Scarsdale, NY).

* * * *

I was inspired and excited when I presented the information to my board a few days after the training with the clear caveat that it is OUR information now. We all agreed that we have been on the right track with rewriting our mission and beginning our strategic plan. And we also agreed that we need a longer time frame to work on our governance issue, so we have planned a five-hour meeting in a few weeks. The president and I are agreed about restructuring our shul so we have stronger and more committed committee chairs to do the policy work, an executive committee to review it, and board meetings which can focus on future direction and finalize votes on policies rather than spending hours on minutiae.

I, too, brought the prayer to the meeting, and it was well received. We have always begun with a rabbi’s invocation, but I like the idea of committees using a simple and effective reminder that what we are doing is holy work. Thanks again for the wonderful work you and the JRF do on our behalf (S, Ner Shalom, Cotati, CA).

* * * *

At our board meeting last week, we began the meeting with the blessing, and we’re planning to start ALL meetings with the blessing. It does tweak one’s frame of mind. I also provided copies of the blue pages to all our board members with the offer to share from the rest of the book whatever interested them. Because there were so many of us at the workshop, we’ll be able to put one of the notebooks in the library.

Before we came to the workshop, we recognized we were a little light on defining what we expect from our committees and began the process of writing descriptions. The resources, however, in the book have made our job just a little easier by providing language that can be adapted for our needs. I also included a comment or two in my president's article for the newsletter:

Last week, we attended "A Sacred Trust," a two-day, values-based-approach workshop to Jewish communal leadership and congregational governance. We came away with a little more direction and a few more ideas and ten pounds heavier with our 950-page resource book!

The last session Monday afternoon was a discussion on how to bring the information back to our communities. One way, obviously, is writing this article and letting all of you know that the seven of us went (we were the largest contingent from any of the synagogues in the West Coast region), and we are available to talk to you and share the resources from this workshop.

You may have noticed that "values-based decision-making" has been the theme throughout all of the JRF workshops, whether talking about growth, the role of money, or congregational leadership and governance. If we are clear about who we are and what we stand for and communicate these values between and among each other, then the decisions we make – no matter how big or small – will be based upon mutually agreed-upon and shared values.

(SL, Dor Hadash, San Diego, CA).

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Excerpt from a recent West Coast Regional Conference (March 2001) about ideas post-workshop.

- Almost everyone who attended had made a report to their board.
- Some articles had been written.
- Some upcoming plans were to use materials for committee mission statements, board and committee descriptions, board training, and bylaws.

Suggestions for use included:

- Give the president and executive committee an overview if they were not present.
- Identify one or two things for immediate implementation.
- Identify a pertinent governance issue and bring the relevant material to the people involved.
- Make a board presentation.
- Make copies of the introductory pages to each section and hand them out to the board and committees.

- Make all leadership and staff aware of the location of the resource book in a central, accessible location (SR, regional director).

* * * *

I am in the process of “personally” inviting about eight to ten board members. I am certain we’ll get a good turnout, for you and “our souls.” I am very much looking forward to learning again with you. These events turn out to be not only very inspirational for me personally, but also are a catalyst for setting things in motion. May and June are our “getting ready for the next year” months and I need to step aside from the hectic administrative pace, even for just two days, to get me back on track thinking about why we are here (BC, executive director, JRC, Evanston, IL).

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An update on some of how we’re using the *Sacred Trust* material:

1. We’ve begun to use the blessing for communal work to begin all our board and operations meetings; it’s also begun to filter out to the committees.
2. I’m now putting the opening paragraph of our mission statement at the top of board and operations agendas.
3. I passed the workbook along to our bylaws chair (she had wanted to attend the workshop but had a conflicting commitment). She has made use of the bylaws and other governance docs in the work of her committee.
4. We did a presentation (which will be the first of several!) at this past week’s board meeting. We talked specifically about roles, responsibilities, and job descriptions for board members. This was particularly apt for us because we’re having a board retreat in May at which this will be an important topic, and our retreat facilitator was also present at the meeting and got copies of some of the *Sacred Trust* materials.

I’m still marveling at the wealth of material in that workbook. Thanks again for providing such a great workshop (EM, Keddem Congregation, Palo Alto, CA).

Appendix V: *A Sacred Trust* Organizations and Bibliography

Organizations and Publishers

The Jewish Reconstructionist Federation: Beit Devora
7804 Montgomery Avenue/ Elkins Park, PA 19027/ 215-782-8500
www.jrf.org

The congregational arm of the Reconstructionist movement, it provides programming, consultation services, and publications to its member communities across North America.

Reconstructionist Rabbinical Association (RRA)
1299 Church Road/ Wyncote, PA 19095/ 215 576-5210
www.therra.org
Professional Rabbinic association of Reconstructionist Movement

Reconstructionist Rabbinical College (RRC)
1299 Church Road/ Wyncote, PA 19095/ 215-576-0800
www.rrc.edu
Reconstructionist seminary that trains rabbis and cantors

The National Jewish Center for Leadership and Learning (CLAL)
440 Park Avenue South, Floor 4/ New York, NY 10016/ 212-779-3300
www.clal.org
Provides learning opportunities and leadership training around a variety of issues including *tzedakah* and communal resources.

The Alban Institute
1-800-486-1318 ext. 244
www.alban.org
A faith-based not-for-profit organization providing educational materials, workshops and resources

Nonprofitgenie.org
Website dedicated to answering questions about the effective management of non-profits

National Center for Nonprofit Boards
200 L Street, NW Suite 510-W/ Washington, DC 20036-4907/ 202-452-6262

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