



NAIA Journal

A Semi-Annual Journal of Synagogue Administration

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TRANSITION

How to deal with change . . .

- during a rabbinic search
- while welcoming new clergy
- when staff members leave
- in planning a move—
your own or your congregation's
- as you look toward retirement

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From the Editor



As we prepare for the new year 5763, I am delighted to take on the responsibility of editor of the *NATA Journal*. On behalf of the entire Editorial Board, I am excited to bring you this issue, called "Transition: How to Deal with Change." As Jewish professionals, we deal with change in the synagogue daily. The changes we may face are many and varied, from the arrival of a new

president every few years to the retirement of a long-term rabbi, from the addition of professional staff to building a new facility, starting a day school, and even

relocating the synagogue.

Change can be thrilling and scary and frustrating and educational—all at the same time. In this issue of the *NATA Journal*, we discuss some common areas of change:

- rabbinic transitions, including a look at the process from a rabbi's perspective,
- your role in the rabbinic search process,
- how your attitude affects change,
- transition to a multi-campus setting,
- the departure of more than one staff member,
- the moving process, step by step, and
- a transition of your own—to retirement.

It is the hope and desire of the Editorial Board that this issue, and all issues of the *NATA Journal*, will educate and inform you about the many facets of synagogue life.

*Nancy Schneider, Executive Director,
Temple Shaaray Tefila, New York City*

President's Message

"Transition: A passing from one condition, place, activity, etc., to another." — Webster's New World Dictionary

"The world can be changed by neither scolding nor laughing." — Yiddish proverb



Mazel tov to Nancy Schneider as she assumes the editorial leadership of the *NATA Journal* with this issue, appropriately devoted to transitions. I know she and her Editorial Board will bring us many interesting and informative issues. Whether we are moving to a new facility, hiring new staff, adding new programs, or accepting new conditions or policies, all transitions can be

challenging. Thanks to the entire Editorial Board for bringing us this timely and necessary issue.

Organizational transitions might be compared to our own development. Congregations often start out small and grow—sometimes without a long-range plan. They may

take many baby steps along the way, oftentimes stumbling, until one day they are "grown." This issue of the *NATA Journal* will help us learn the pitfalls, methods, and pleasures of the many transitions that we face as temple administrators.

NATA itself is always changing to meet the needs of all its members. Throughout the years, our organization has developed educational programs, improved communication with its members, contributed to the larger community of Reform Judaism, and helped countless congregations through their own transitions. I welcome your knowledge, abilities, suggestions, and contributions as I make a transition of my own as your president. Through our combined efforts, NATA—like our congregations—will be able to face the challenging transitions that await us all.

*Elizabeth L. Hirsch, FTA,
Executive Director, Congregation Beth Or,
Spring House, Pennsylvania*

Toward Successful Rabbinic Transitions

by Dale Glasser, M.S., M.A., M.S.W.,

Director, UAHC Ida and Howard Wilkoff Department of Synagogue Management



The reality of congregational life is that change will occur. Few changes will affect all aspects of the congregation like the leaving of one rabbi and the arrival of another. Experience and research indicate that—while change is, by definition, disruptive—a well-managed transition process can provide opportunities for learning, growth, and community-building in the congregation.

In his book, *Managing Transition: Making the Most of Change*, William Bridges writes: “It isn’t the changes that do you in, it’s the transitions. Change is not the same as transition. Change is situational; transition is the psychological process people go through to come to terms with the new situation. Change is external, transition is internal.... Unless transition occurs, change will not work.”

The rabbinic transition process should start at the same time as the search process. The first step is the appointment of a Transition Committee, whose tasks and responsibilities focus on working with various constituencies within the congregation, the outgoing rabbi, and the new rabbi to promote the successful integration of the new rabbi into the life and spirit of the congregation. Ideally, the core Transition Committee remains in place throughout the first year of a new rabbi’s tenure. Other congregants can become actively involved in the transition process by serving on sub-committees with time-limited, specific purposes. Possible subcommittees might plan events to welcome the new rabbi; communicate with the congregation, staff, and community; and honor the outgoing rabbi.

Indeed, experts suggest that the single most significant factor influencing the success of a new rabbi in a congregation is the way a congregation says goodbye to the departing rabbi. Working to create an orderly transition process—one that allows congregants to acknowledge the

impact of the rabbi who is leaving and provides opportunities to meet and welcome the community’s new spiritual leader—can lay the foundation for a strong, healthy congregational future.

Among the activities that can lead to a positive rabbinic transition are those that:

- assist the current rabbi in planning how to bring closure to his/her tenure,
- clarify the mutual expectations of the new rabbi, the lay leadership, and the congregation, and
- understand and respect the rabbi’s need, and that of his/her family, to adjust to a new home and community.

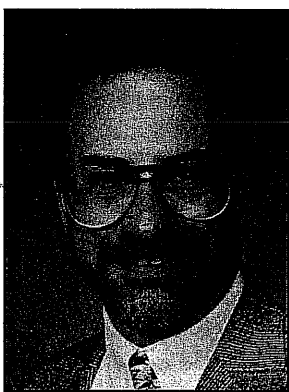
Rabbi W. Gunther Plaut, writing in *The Torah: A Modern Commentary*, reminds us that even Moses and Joshua, among the greatest leaders in Jewish history, experienced the trauma of transition. In contemporary times, we know that a well-planned transition process can minimize that trauma for the new rabbi and for the congregational community with which that rabbi will forge a sacred and covenantal partnership.

Some of the information above is based on “Rabbinic Transition,” a pamphlet published by the UAHC Ida and Howard Wilkoff Department of Synagogue Management. It is available on the Web to UAHC congregations (<http://uahc.org/synman/publications.shtml>) or by phone (212-650-4040). ●

The Temple Administrator's Role During a Rabbinic Search

by Larry Broder,

Executive Director, Temple De Hirsch Sinai, Seattle, Washington



No three activities have more power to solidify a congregation than writing a Torah, building a new synagogue, and hiring a new senior rabbi. Each of these activities has the power to bring together a multitude of constituencies and create a powerful dialogue that expresses the value and soul of a congregation. And in each endeavor, the temple administrator can play a critical role. What

goes on behind the scenes, led by the administrator, ensures efficient operation and ultimate success.

A successful rabbinic search followed by a smooth transition between religious leaders is the result of careful planning and strategic thought. Key individuals and constituencies must be afforded the opportunity to make constructive recommendations that result in a convergence of thought and selection of a suitable candidate. This multi-month process, if done correctly, should result not only in the selection of a new rabbi, but in the restatement and redefinition of a congregation's values. By the end of the process, a congregation should understand itself and why it selected its new leadership, as well as giving itself marching orders for the near future.

Change, even when it is needed, is always difficult and complex. It may be scary or resented, and it is always destabilizing. Therefore, the two most important roles an administrator can play in a successful rabbinic search and transition are: first, to ensure a smooth-running temple operation so that, despite the impending changes, the place not only feels stable but is stable, and, second, to keep the agents of change—the committees and individuals—*informed, focused, and supported.* One cannot overrate the stability and guidance that a calm administrator can provide. One need not have previously gone through the process oneself to provide this support. By using the

extensive national network of administrators, one can get almost instantaneous responses to questions and concerns as they arise.

What are the steps of a successful search and transition, and how can the administrator help?

- Review by-laws of the search/election process.

The administrator provides access and interpretation of bylaws. If there is an absence of clarity, consult colleagues and the UAHC.

- Form the search committee. The administrator can assist in developing a matrix of temple constituents by suggesting those with good judgment who represent fairly, and those capable of collaboratively working together to achieve a common goal.

- Develop a congregational survey. The administrator, talking to colleagues, can tailor one of the many congregational surveys that are key to developing a collective vision of what the new spiritual leader can be. It is important that the chair of the committee be a highly credible and collaborative leader, so the selected finalists result from a defensible process. Point to this survey throughout the process to show what was used to define the qualities of the best candidate.

- Analyze the data. Once returned, survey data must be compiled and analyzed—a process that can be directed by the administrator.

- Create a job announcement. Concurrent with the survey is the development of a job announcement and listing with the CCAR Placement Service. Results of the survey help answer several key questions regarding what the congregation is looking for in a new rabbi.

- Rank candidates. Once the job is announced, submitted resumes must be ranked on a number of scales with constant reference to the survey results showing that the successful candidates possess corresponding qualities or experience. Again, the administrator can assist the committee to maintain its focus.

- Organize a schedule. As resumes are reviewed, a visitation schedule of the top finalists and the on-site

Continued on next page

interviews must be planned. This includes logistics, hotel, airport pickups, spouse activities, and more. No one is more capable of overseeing the logistical planning than the temple administrator.

● **Plan greeting events.** So much energy goes into the search that temple leadership often forgets that the job is only partially complete when a new hire is made. The administrator can again provide logistical support, guidance, and direction to ensure that the entire congregational community has an opportunity to welcome and get acquainted with the new rabbi and his or her family—an essential, and often overlooked, step. Strategically planned parties, teas, community gatherings, business lunches, barbeques, and other formal and casual events serve this purpose well, and all can be supported by the administrator.

The most powerful piece of advice a colleague gave me—when I expressed my own concerns about the impending senior rabbinic transition at my synagogue—was that I be the logistical contact for each candidate and that I pick up each candidate at the airport and become the main professional contact and confidante. After picking up each rabbi at the airport, I objectively provided information about the city, temple community, housing, transportation, and other concerns of our five candidates. Through leading city tours, I got to know the candidates and their families. While their interviews were expectedly stressful, my time with each was casual, collegial, and supportive. Consequently, each candidate walking past my open office door during a visit dropped in with something cheerful to say. In a sense, I provided a safe haven for them and their families. This “first face” bonding proved enormously valuable and cemented a wonderful personal and professional relationship between my new senior rabbi and me.

While you may be asked to express your opinion on the suitability of each candidate, be careful to express your feelings and impressions in an objective manner. Knowing your committee chair and the search team, and understanding the process, can help you position yourself to be able to work with the new senior rabbi constructively. Working with the search chair and team can cement the relationship

between an administrator and congregation.

Assisting the search committee and the congregation can ensure a smooth and productive search process and ensure a strong working relationship between two of the most important synagogue professionals. ●

NATA-SCHMOOZE @shamash.org

... a familiar e-mail address for those of us who subscribe to it. On it, we find a place to ask questions and the answers to our questions. It's a place to turn for support and guidance, to say hello and goodbye, and to learn from and share with one another.

This e-mail discussion group is limited to regular, senior, and courtesy members of NATA who are currently serving as temple administrators in temples or synagogues on a full- or part-time basis.

Subscriber information can be found at:

<http://rj.org/nata/schmooze.html>

For more information about NATA-SCHMOOZE, contact: Eli Montague, FTA, at eli@ti-stl.org.

Transition x 3: A Case Study

by Livia Thompson,
Executive Director, Central Synagogue, New York City



A few months ago, I looked around and breathed a sigh of relief. We had just finished a major three-year restoration project following a devastating fire to our sanctuary building, and I was eagerly working on a number of new projects. Our board of trustees had launched a strategic planning process, we were in the early stages of implementing an entirely new computer database system, I

was slowly making some needed changes in the administrative and maintenance staff, and we were working hard to learn about the new lighting and sound systems in the sanctuary. It was a full plate, and all of it forward-looking.

And then, in the course of a few months, we learned that three members of our senior staff were leaving for other opportunities. All of a sudden, we had to think about a major transition. Our cantor was going to a suburban congregation in Pennsylvania, one of our rabbis was becoming the senior rabbi in a suburban congregation in New York, and our educator was becoming the rabbi-in-residence of a college on Long Island. Quite aware of the shortage in Jewish professionals that has gripped our movement, we were faced with three searches for three very significant positions. Moreover, our senior rabbi left for a three-month sabbatical on the first of May. We needed to make decisions quickly and to set ourselves up for next year in a very short period of time.

These transitions involved a number of different issues:

- working with our lay leadership to assure congregants that we were a healthy congregation going through a natural life process;
- setting up search committees and making some crucial decisions about how to proceed;
- reassuring the staff, both professional and non-

professional, that there was not a mass exodus;

- thinking about how these staff changes affected the strategic planning process underway;
- providing opportunities for people to say goodbye and hello; and
- making the necessary administrative changes.

The following is a brief outline of how we handled each of those issues.

Reassuring the congregation and lay leadership

We learned about the three staff departures within a relatively short time frame. We needed to move quickly to get the message out that these were normal changes within the history of our institutional life, and that these people were leaving for good personal reasons, and not because of some kind of organizational problem. Our senior rabbi spoke to our board of trustees about transitional moments, and we also sent a note out to the board and other lay leaders from both the rabbi and the president. In our monthly bulletin, articles acknowledged both the loss and the achievements of the departing staff members. Once we knew who a new staff member was, letters were sent to inform the congregation; our departing staff also sent notes to the congregation. In all communications, we stressed that transitions were natural and that we were optimistic about who would be joining us when we successfully completed our searches.

Search committees

As soon as we became aware that a position was being vacated, we appointed a search committee. The president chose the chair, in consultation with the senior rabbi, the officers, and the executive director. With the chair, members of the committee were chosen. These committee members included representatives of key constituencies for that position; i.e. for the cantorial search committee, we included members of the ritual and music programming committees. The search committee met first

Continued on next page

to discuss the position, review a job description, talk about the qualities of the person being sought, and put together a procedure for the search itself. In all cases, these committees decided to conduct phone interviews with interested parties as a first step, with at least two committee members on each phone call. If the telephone interview went well, candidates would be invited to Central Synagogue. At each officers and trustees meeting, we briefed the lay leadership on the status of each search. We did the same thing in each bulletin. We were always positive about our progress, the possibilities, and the results (even before we knew whom we would hire).

Reassuring the staff

We worried not only about the message that our lay leadership and congregants might get from the three changes, but also that our senior and non-professional staff might become concerned. Part of our response was to build in more team-building opportunities, such as special lunches in local restaurants and extra all-staff meetings. In addition, we asked the senior staff to make more of an effort to get around to the various floors of our community house where staff is located. By and large, the departing staff members chose to let people know individually that they were leaving and to thank them for their help. We had a facilitated retreat for the senior staff, where we specifically focused on issues of transition and what these changes meant both for those who were staying and those who were leaving. We also had meetings with the rest of the staff to inform them of the changes, to talk about the searches, and to reassure them about the future. We acknowledged that transitions could be hard for everyone, and that there would be a certain amount of disruption. But we also talked about the excitement of the new team and how we would work together to create that new working group. There were private meetings with members of the administrative support staff who would be most directly affected by the changes in staff, to talk about their concerns and to give them some guidance about what the change would mean for them.

How the strategic planning process was affected

There was another piece of the puzzle to address, and that was the fact that we were engaged in this major staff transition while we were going through a strategic planning process to decide what we wanted the synagogue to be over the next five years. In many ways, this transition process was a perfect partnership to the transition searches. The search committees wanted to make sure that candidates could articulate a vision in keeping with the path the strategic plan was taking. We were clear that we were looking for individuals who were not afraid of change—indeed, who welcomed it—and could be leaders in implementing changes in our ritual, our program, and our educational activities.

Providing opportunities to say goodbye and hello

Ceremonies are an important part of synagogue life, and we needed to think carefully about how to say goodbye to the departing individuals and how to welcome the new staff. For those leaving Central Synagogue, we recognized, measured, and gauged the nature of celebration based on each person's position and length of tenure. We also wanted to make sure that each person received an appropriate gift and thank-you acknowledgement from the congregation. Thus, we wanted to make sure that the religious school community was intimately involved in planning and carrying out the educational director's goodbye party and thank you. The program was planned for an afternoon when the most children were in religious school, for an hour when many parents would be showing up to pick their children up. The religious school committee organized the event and sent out the invitations to the full religious school committee, the board, and the religious school families. The bulletin article included quotes from the president, a clergy representative, two lay leaders, and a few students. The cantor's goodbye event was at a Friday-night service in the spring and included a special extended *oneg* following services. The invitation went to the entire congregation, and the bulletin article was a little larger and more prominent than the educator's article,

although similar in style. The rabbi's goodbye event was two-fold—a special Friday-night service and *oneg*, and a trustee dinner following a Friday-night service; committee members he had worked with closely were invited to attend. Each event was geared to the person leaving, with special speakers and program elements that were meaningful. The events allowed congregants to say goodbye and to offer their best wishes, and to see that the leadership wanted to acknowledge their contribution publicly and in a celebratory manner.

Equally important for the congregation is the chance to welcome the new staff, and to help our new rabbi, cantor, and educator become part of our community. As I write this article, we are in the planning stages of the installation service for the new rabbi. Our interim cantor will not be installed. Our educator will have a special reception with parents of our religious school. We will also make sure that there are informal ways for congregants to meet the new staff—classes, *onegs* following services, and special programs—and we will introduce them officially at our annual congregational meeting. We need to make sure the new staff members feel connected quickly, and we have developed a special transition retreat with the professional staff and with key lay leaders, over a two-day period, during which there will be concrete presentations on a number of administrative procedures, plus conversations with committee chairs and others about what the crucial issues are. To start the introduction into their new community, the new staff members have been invited, and encouraged, to take part in programs and services in the spring—before they officially come on board

Administrative support for the changes

The administrative support of people coming and going required a great deal of planning and organization. We needed to work with the outgoing people to help move their books, files, and other objects out of their offices; to copy personal computer information and materials; and to close out their discretionary-fund expenditures. We needed to think about changes we wanted to make to the offices

and to get them ready in time for the new staff to move in. Outside signs, web-site listings, bulletin listings, weekly order-of-service materials, membership brochures, and other semi-permanent materials needed to be changed to reflect the new staff. Because we wanted them to start getting information at once, we decided to create e-mail addresses for them, and to put them on our mailing lists immediately.

We also had to make sure that business cards, stationery, and other office matters were settled so that the new staff members could walk into their offices and begin to feel at home. And, of course, the most important final touch was to order flowers of welcome for their first day in the office!

In many ways, the transition effort did not change because we had several people leaving and coming at the same time. It did, however, make us more conscious of the need to show that we were strong. While we have acknowledged that we are in transition and that there will be changes, we have also worked hard to make sure that everyone understands that the congregation and staff of last year and the congregation of this upcoming year are both vibrant and exciting. ●

NATA Placement Service

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Tradition, Transition! Maintaining the Balance

by Loree B. Resnik,

Executive Director, Suburban Temple-Kol Ami, Beachwood, Ohio



“Tradition, Tradition!” sang Tevya. If he had been really knowledgeable about synagogue life, he would have sung: *“Tradition, Transition!”* How do we think of one without the other? It is difficult to go through transition without keeping hold of tradition, the *minhag* of our congregations.

We faced the challenge of choosing a new spiritual leader for a temple that is

fifty-four years old and has had just two rabbis. When our outstanding spiritual leader of more than twenty-six years announced his retirement seventeen months ago, we began what I, until then, had only heard discussed among my NATA colleagues. “The Search” had finally come to Suburban Temple.

We began a process that, I believe, was truly the basis for a long-range plan. We engaged in self-examination that was both healthy and helpful through the application form from the Central Conference of American Rabbis. It forced us to rethink who we were and where we wanted to go next. We needed a plan to make this analysis happen, and we used all the resources available. The CCAR placement office, under Rabbi Arnold Sher, helped guide us as we began and continued the process. Our own regional rabbi, Rabbi Elliott Kleinman, also played a significant and helpful role. Our senior rabbi graciously absented himself from the process, except to answer questions as needed and to meet with candidates brought in for interviews.

The president and I worked together to determine who might serve on the search committee. We knew we had an incredibly able chairperson, and we put hours into representing all segments of the congregation in a workable committee of fifteen people. They included newer members with young children, our Women’s Committee

president, past presidents, some current officers, the chairperson of our seniors group, and strong representation of past board members and fund-raising chairs. They were told from the beginning that theirs was an awesome task, one that would take many hours of their time, often on short notice.

We determined that we couldn’t answer the CCAR application’s questions—listing our strengths and weaknesses, cataloging our goals and aspirations, and describing our identity—until we were certain of the answers. We convened a search committee retreat, a board of trustees special session, and focus groups open to the entire congregation so that, when we completed the CCAR application, it was with an accurate depiction of Suburban Temple of the past, present, and what we perceived to be the future.

I was fortunate to work with officers and a committee who valued what I could bring to this process from my almost twenty-five years of experience as executive director. As our presidential leadership changed in July, I continued to help set agendas and guide the process, always understanding that the selection of our new spiritual leader was their job. I never gave opinions, only presented the history and the current state of the congregation. I never asked the questions, but I had the responsibility of helping determine what the questions might be.

I sat in on the initial telephone interviews, always informing the candidates that I was there. What did I do at those sessions? Once again, I was a resource. If a candidate asked a question to which others did not know the answer, I helped out. Once again, I never asked a question. During that period, committee members would often ask me, “Loree, what do you think? Who do you think is the best candidate?” I never answered that question. Instead, I always responded that the decision was theirs, and that I would work to help the rabbi of their choice. I knew what an outstanding group of people they were and that they truly understood what our congregation needed. And indeed, I knew my own role.

That role continued as final candidates were brought

to Cleveland to visit. In a solo rabbi congregation of about 540 membership units, the search is momentous. Our retiring rabbi will become rabbi emeritus, but the continuation of the tradition of our congregation will rest on the shoulders of our new spiritual leader. That person will need to understand that in our congregation tradition truly does mean "standing on the shoulders of the ones who came before us." Our leaders knew they wanted evolutionary change, not revolutionary policies, and they needed to find the right fit.

By mutual agreement, I did not sit in on those final interviews, but I did help work out the visits. I consulted on who needed to be invited for breakfasts or lunches. I helped develop the concepts of the teaching sessions and the meetings with our educational team and me. At my own sessions with candidates, I explained our organizational structures, our leadership styles, and how I would support their rabbinate through my own work in congregational life. And, of course, I helped develop all the details of the visits like hotel stays, meal options, and the all-important welcome baskets. Ever the producer—as I like to think of the role of a temple administrator—I helped set the stage, put all the stakeholders together, and organize the funding for the entire effort of the search.

We worked hard together to bring in a new spiritual leader who will guide our congregation into this new century. As congregational leaders, both lay and professional, we are proud of our efforts and the success of this difficult mission. Most important, we achieved this goal in an atmosphere of spirited discussion, of total trust in one another and the process, and in an environment free of acrimony or stridency. We achieved our goal as we prepared our congregation to go from strength to strength. ●

NATA Consulting Services

The NATA consulting service is available to member congregations of the Union of American Hebrew Congregations. NATA represents the combined expertise and experience of hundreds of professional temple administrators. These administrators will respond to your congregation's needs in the area you designate.

The consulting fee of up to \$750 is waived to UAHC member congregations. Congregations are required only to reimburse the consultant's expenses.

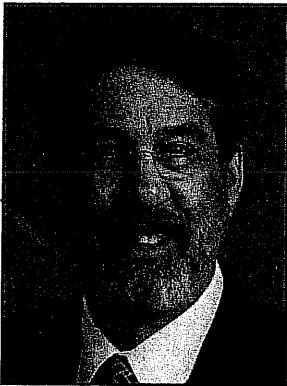
Consultations may be requested by completing the form linked to the NATA web page (<http://rj.org/nata>). The completed form should be returned to the Office of Synagogue Management at the UAHC. The Director will then confer with the NATA leadership to provide the most appropriate consultant(s). The congregational leader indicated on the request form will be contacted to make specific arrangements.

The Department of Synagogue Management can assist in other ways. See the UAHC Communicate program for great ideas.

Contact Mark R. Jacobson (at 404-873-1731) or Dale Glasser (in the UAHC office at 212-650-4040) for more information.

Clergy Transition: 10 Principles

by Rabbi Jonathan A. Stein,
Temple Shaaray Tefila, New York City



My wife, Susan, and I have been blessed to serve a number of wonderful congregations. Our two most recent transitions, to Congregation Beth Israel of San Diego in 1994 and Temple Shaaray Tefila of New York in 2001, have given us insight into making successful transitions.

We offer ten principles, listed here in a somewhat chronological order. Of course, congregations should

tailor these principles to their own situations.

1. Pay special attention to your new rabbi's spouse and family. A happy rabbinic spouse and children, including grown children who live out of town, are crucial to your success. Help the spouse and children find new friends, and provide them with lists of stores, vendors, and services they will need to adapt to your community.

2. Provide opportunities for your new clergy and family to meet as many members of your congregation as possible before the moving date. This could include meetings with staff and members of the board of trustees as well as the transition committee. Express your enthusiasm over their arrival and make them feel that everyone has made a good decision.

3. Make your contract negotiations as painless as possible. While it is, of course, impractical to meet every contractual request, try to find ways to express your appreciation for the decision to join your congregation during the negotiations.

4. Recognize that your new clergy and their families will experience a significant sense of loss as they leave their old congregation and home. There will be moments of doubt and questioning as well as times of energy and enthusiasm. Support your new rabbi through all the personal, emotional, and spiritual changes the transition entails.

5. When possible, have the congregation pay the movers' bills directly. Make arrangements for temporary housing while the move is in progress. Stock your new

rabbi's home with groceries and other materials. It is a lovely sign of welcome to send Shabbat dinners for the first weeks.

6. Plan a glorious weekend of installation sometime after your new rabbi's first High Holy Days. Allow him or her to choose a guest speaker. Print a nice program and send invitations to your congregation, community leaders, and local dignitaries. Help defray travel expenses for the rabbi's family so they can attend, and host a dinner just for the family and out-of-town guests. If you can, arrange an entire weekend of celebration. Consider a cultural event or scholarly presentation as part of the celebration. For the truly ambitious, commission a special piece of music.

7. Arrange for medium-size group meetings so that the rabbi can quickly meet as many congregants as possible. Coffees in the homes of various congregants is one successful way to do this. Allow time for socializing and for members to get acquainted. Ask your new rabbi to speak briefly and to be available to answer questions.

8. Help your new rabbi establish personal relationships with a wide variety of congregants. Arrange for luncheon or dinner meetings with members of the board of trustees, staff, families with deep historical roots in the congregation, families of substantial influence, current and potential major financial contributors, past presidents, honorary board members, and local celebrities and dignitaries who are members of the synagogue. Allow 18-24 months for these one-on-one meetings to take place.

9. Introduce your rabbi to members of the community, including Jewish professionals and clergy, the interfaith community, and local politicians and representatives.

10. Plan a similar transition for all new clergy, including assistant or associate rabbis and cantors. Make sure all your clergy receive invitations to share holiday meals with members of your congregation every year.

A smooth transition is crucial to the long-term success of the relationship of a new rabbi and his or her congregation. Although the honeymoon period will inevitably give way to a settling-in process, nothing can substitute for the good feelings that are created during this initial time of getting to know each other. Go out of your way to do more than you think is necessary. It will pay great dividends for your future together. ●

Attitude Is Everything

by Steven D. Bram, FTA, M.S.S.A,
Executive Director, Temple Sinai, Atlanta, Georgia



In my seventeen years of serving as a synagogue executive director, I have learned that having a positive attitude toward change and transitions has helped me survive the stresses that inevitably come with change. We all have to deal with the changeover of lay leadership, particularly the president of the congregation, every couple of years. Just when you've adapted to a

president's leadership style, it's time for a new president. While transitions are always somewhat painful, you need to embrace change and look at change as an opportunity. It is a time to use the strengths of new people for the good of the congregation.

The executive director can play a role in helping both lay leaders and staff to deal with change in a positive way. Resistance to change is a normal reaction, and the executive director can help ensure that this resistance does not become destructive to the goal of moving the temple forward. A skilled executive director can help the congregation during transition periods to remain on course with as little interruption as possible. Using your sense of humor can help relieve tensions during transition periods.

I had the unusual experience of returning to the synagogue where I had worked as the executive director nine years earlier—Temple Sinai in Atlanta, Georgia. I worked at Congregation Shaare Emeth for the nine years in between my employment at Temple Sinai. Shaare Emeth is a large (2,000 family units), successful congregation in St. Louis, Missouri. I decided to make a lifestyle change when I came back to Temple Sinai (900 family units); a smaller temple would lend itself better to balancing my family and work lives.

When facing a physical move and/or a career move, you should admit that the transition is stressful. Addressing the issues directly will ultimately make the transition successful. My family and I had the normal adjustments of moving (getting used to new schools, making new friends,

learning about a new neighborhood). What was unusual in this transition was that my transition back to Temple Sinai as executive director was not stressful; it was as if I were coming home. Even though there were some new staff members, many others were still working there (I had even hired some of them during my first tenure). I also knew many of the congregants. When my son became a bar mitzvah at Temple Sinai this past year, it was a warm and intimate experience, as many Sinai congregants and staff attended this important life-cycle event for my family and me. "Coming home" has been one of my best career moves!

As you deal with change and transitions at your synagogues, my best advice would be to maintain a positive attitude toward change, and have a sense of humor. ●

The NATA Web Site: Log On!

Have you visited the NATA web site? If not, log on at <http://rj.org/nata>.

Major sections include the *Journal*; convention information; FTA certification; criteria, and information; officers; and the mission statement. You can also find information on the NATA Placement and Consulting Services. Two other sections include Judaic and other internet resource links, including links to other web sites that contain information of interest and help to NATA members.

New information is always being added, and suggestions are always welcome, as is assistance in our goal to make the web site more interactive.

From Transition to *Shehechyanu*: A Congregation's "Moving" Story

by Stuart Simmons, Executive Director,
Congregation Beth Israel, San Diego, California



When the Israelites were finally permitted to leave Egypt, they had little time to prepare. This was not the case when, late last year, over the Thanksgiving weekend, Congregation Beth Israel of San Diego left a 76-year-old facility and moved into a newly completed, five-building, 65,000-square-foot, campuslike setting, twelve miles to the north. The story of this "leaving" by a group

of modern-day Beth Israelites spans thirty years.

Congregation Beth Israel traces its San Diego roots back 141 years to 1861. In 1887, the community bought land downtown to build a small, one-building synagogue that was completed in 1889. Membership grew. By 1925, with sixty families, the group had outgrown its first temple. The congregation bought land about twelve blocks uptown and built its second home, consisting of a sanctuary and social hall plus a few classrooms. In the 1960s, the congregation built a school building and watched the membership grow to more than 1,370 households.

Following an earthquake in the Los Angeles area in 1971, the congregation commissioned an engineering study which revealed that our sanctuary and social hall, built before the enactment of then-current earthquake building codes, were constructed of material that might cause their collapse in the event of a major earthquake. Retrofitting was impractical, given an estimate of the cost. By the mid-1980s, cramped for space, we realized we had long outgrown our congregational home. We had no land on which to expand, and a growing number of families with school-age children had moved to outlying areas, affiliating with other synagogues closer to where they lived.

In the late 1980s, the leadership took on the challenge to raise both enthusiasm and money to build a satellite facility almost twenty miles from our site. We purchased land

and hired an architect, but after a couple of years, a comprehensive feasibility study revealed that the members did not support the idea of a two-site temple. It was thought to be far too expensive to build a new facility and retrofit the old site to make it less vulnerable to earthquake damage. After the study, the plan was abandoned, the land was sold, and the proceeds were put in the bank until an alternate idea emerged: a complete relocation to a new site.

In 1993, the congregation purchased a three-acre site just east of La Jolla. We used the proceeds from the sale of the earlier parcel of land to make a down payment and conducted a brief land-acquisition campaign to pay the balance. It seemed like we were moving in the right direction. Then we were stopped in our tracks. Our senior rabbi resigned, putting our plans on indefinite hold. It took a year to hire a new senior rabbi, and it was decided that it would be difficult to engender support for a major capital campaign until the congregation got to know him.

By 1996, an oft-hear refrain was: "We own the land, we have a senior rabbi. When are we going to start building our new temple?" Everyone agreed the time was finally right. From that moment until we held a groundbreaking ceremony in January 2000, all we had to do was:

- create a fund-raising committee,
- create a building committee,
- hire a fund-raising consultant,
- conduct a feasibility study,
- raise a bunch of money,
- hire an architect,
- develop a facilities program to define what we intended to build,
- approve a design,
- get cost estimates (Surprise: The project cost more than the estimates),
- raise a bunch of money,
- get through the regulatory approval process, and
- hire a general contractor.

After the groundbreaking, all we had to do was:

- obtain a building permit,
- start construction,

- raise a bunch of money,
- complete construction,
- move out of our old location and move into our new one,
- *Did I mention, raise a bunch of money?*
- . . . and, finally, pay for everything!

How does an institution make a transition from the home it has occupied for three quarters of a century to another? Few people remembered the move into our second home 76 years earlier. Now we were about to move into our third home as we also made the transition into our third century. Were the Beth Israel members in the early 1920s nostalgic about their move? We really do not know. But during the years of construction and actually making this move, emotions were running high. While nearly everyone acknowledged the need to move, many members expressed a strong sense of nostalgia reflecting on 76 years of weddings, baby namings, b'nai mitzvah ceremonies, and funerals held in our old spiritual home.

As we were emotionally preparing for the move, we received very upsetting news. Just prior to the High Holy Days of 2000, with construction underway, our senior rabbi announced he would be leaving in June 2001.

Many congregants were now feeling a profound sense of loss and dislocation. We worried whether this would affect pledge commitments. It was a tough time. The transition took on an added dimension as the congregation embarked on a rabbinic search while finishing the construction of the buildings. Fortunately, a successful search was completed, donors kept their commitments, and we forged ahead. Last June, while still in our old familiar sanctuary, we said an emotional farewell to our departing rabbi and, a few weeks later, welcomed our arriving rabbi.

Throughout the summer, we had hoped to move in time for the start of our school programs in September, but the buildings were not ready for occupancy. We could move in October, they promised. As the move time neared, our lay leadership and professional staff, together with our new senior rabbi, all did their best to acknowledge

everyone's feelings of attachment to our old site, and we celebrated this aspect of our transition through the creation of two special events. On a Sunday morning, we celebrated the long legacy at our old site with a program we called "Birkat haTorah." We blessed our sacred Torah scrolls and walked with them lovingly, throughout the sanctuary, much like a Simchat Torah celebration. Individual members were invited to reminisce about their special memories of times spent in the synagogue. On that day, we also opened a time capsule that had been placed in the ground when the 1960s school building was completed.

The second event was planned in two parts over a weekend. Although we could not move in time for the start of school, we thought surely we would have already moved our school activities and offices by mid-October. We declared the last Friday of the month would be the last Shabbat service in the old sanctuary. On Sunday, that same weekend, we would go to our new campus, install our new senior rabbi, affix a *mezuzah*, and dedicate our new sanctuary, thereby completing the final phase of the move.

Anticipation of these events, coupled with the news that we had secured a buyer for the old site who was committed to incorporating the old temple into his redevelopment plans, helped ease sad feelings about our departure. Everyone happily realized our very promising future, tied to our move, was not going to be marred by thoughts of our beloved old temple being torn down.

Well, that was good news, but it turned out the new facilities were still not ready for a mid-October move. However, because of planning, publicity, and commitments we had made, it was imperative that we proceed with the senior rabbi's installation and building dedication at the end of October as planned. By pulling a lot of strings, we obtained a one-day certificate of occupancy from the City of San Diego, and we held a beautiful and memorable event celebrating the arrival of our new rabbi and the *near*-completion of our new home. Ironically, the next day, we were back at work in our old facility looking forward to celebrating Shabbat, again, still in our old sanctuary and

Continued on next page

still without a confirmed move date.

Long ago we determined that the key words were “flexibility” and “*savlanut*” (patience). Everyone was remarkably accepting of the delays, saying, almost in unison: “What did you expect? It’s a construction project.” We hired a moving company that specialized in commercial and business relocation. Despite changing the date three times, they remained flexible, cheerful, patient, and always ready to help.

We also hired a move consultant to coordinate the myriad details involved in a relocation. They developed a list containing more than 200 items to address. Some were obvious, like change-of-address forms and new telephone service. Other items on the list were designed to help teachers and staff prepare classrooms and work areas for the move.

As daunting as the task seemed, the mover and the move consultant made it possible for us to walk out of our old facility on the Friday after Thanksgiving, arrive at our new facility on the following Monday, and find everything from prayer books to personal desk accessories in the right location, ready to unpack and put to use. And they did it all in the span of a weekend!

I am writing this article five months after our move and about one month after Passover. The story of the Exodus recalls God bringing ten plagues on the Egyptians before the Israelites’ hasty departure from Pharaoh’s bondage. Then they had to spend forty years in the desert and undergo a change in leadership before reaching the Promised Land.

The story of the modern-day Beth Israelites of San Diego, although quite different, contains some recognizable elements. We spent thirty years preparing for our departure, but, once we were told to move, we accomplished it in one weekend. During those three decades, we changed leadership, not once, but twice. During 2001, even though we had clear goals and objectives and could see progress being made, at times I thought the myriad details—of governmental approvals, construction difficulties, raising a bunch of money, multiple delays in schedul-

ing the move, and the enormous task of moving itself—felt like we had been afflicted with a whole new set of plagues.

Now, however, I can reflect and see that a good attitude and good teamwork by a dedicated congregation and its staff have created the promise of a great future.

I now work in an office on the second floor of one of our new buildings. From my desk, I can see the top of a pine tree we planted in a courtyard. While writing this story, I have watched a hummingbird fly into and out of that tree, to what is surely a nest she has built, hidden from my view. She shows a great amount of determination and patience as she gazes at the world around her. In a bird-like way, she is proud of her accomplishment. She inspires me and makes me realize that the simple act of our congregation’s planting a tree in the midst of a paved courtyard is helping to secure the little hummingbird’s family and future. Through our efforts and determination, coupled with a great deal of patience, we have built a magnificent new spiritual home—our nest—and we, too, are justly proud. This chapter is complete, and we look to the future. We have moved from transition time to *shehechyanu* time. ●

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A Dozen Roses to Sweeten Retirement

by Joseph W. Boston,
retired Executive Director, Congregation B'nai Jehudah, Kansas City, Missouri



Rose # 12: Recognize that how we deal with new challenges may be a signal that it is time to move on to retirement. While it is not universally true, it is often true that as we near the time for retirement we find it more difficult to deal with change, to accept new ideas, to look for more effective solutions, to accept the opinions of others in our areas of expertise, and to find the energy

needed in this fast-paced world to keep up with the ever-changing requirements of the stakeholders of our temples.

Rose # 11: Absent yourself from the temple premises to permit your successor to assume his/her new position fully and begin to have his/her own influence. It will help the temple membership and the temple staff begin the emotional transition to your successor, and it will help you make the emotional transition to your retirement life.

Rose #10: Be a friend to your friends, and keep them as friends. Your new lifestyle will change the times and places that you are available to be with friends. Make the effort to continue being with them because friends are one of the touchstones that keep life enjoyable.

Rose #9: Count your blessings, not your curses. Age takes its toll for passage along the road to older life. A conscious effort to dwell on what brings you joy and contentment rather than what brings you sadness or pain will accrue to your well-being emotionally and physically. The move to retirement needs to be recognized as a difficult and emotional transition that one must work through to gain contentment.

Rose # 8: Because you are the person in charge of how you will deal with the bad and good in life, you solely have the responsibility to make your life beneficially meaningful for you. Only you can make your retirement life worthwhile. Do not dwell on others who may cause you difficulty or

provide you benefits, because to do so will make you feel the quality of your life is dependent on the actions of others. Concentrate on being responsible for your own reactions to difficulties and benefits. The meaningfulness of your life is a continuum of how you accept and deal with the unpleasant and pleasant experiences happening to an evolving you.

Rose # 7: During retirement, work toward self-determined goals to maintain a sense of achievement that replaces the goals of the economic workplace. A sense of achievement fosters a continued sense of self-value.

Rose # 6: Keep romance in your marriage. Don't just go out together. Plan your going out, making it special for your loved one. Remember that feelings of lust and expressions of love co-joined, however tempered in older life, still make for luscious togetherness.

Rose # 5: Plan and have executed an event during which the fact of your retirement will be celebrated with thanks and appreciation. It will move you emotionally from economically working for others to doing whatever you consider pleasurable and beneficial doing for yourself.

Rose # 4: Practice a healthy lifestyle. Even if you start later in life, you will feel physically healthier, and illnesses that often come with aging might be postponed. Good health is a key component of an enjoyable retirement.

Rose # 3: Develop an estate plan including IRAs, living trusts, living wills, wills, powers of attorney, life insurance, ethical wills, and the like that will provide for your surviving spouse, surviving children, other loved ones, and institutions and organizations you believe in.

Rose # 2: Provide for health insurance for yourself and your spouse for short-term illnesses and long-term care. Unless you already have the financial assets to self-insure, the cost of medical care can deplete the monies you need if illness occurs.

Rose # 1: Plan to ensure that in your retirement you have sufficient income to live in the manner you believe is reasonable for your situation and will provide for enjoyment and contentment. ●

Transition to a Multi-Campus Setting

by Steve Breuer,

Executive Director, Wilshire Boulevard Temple, Los Angeles, California



“Ah, if only we had a Westside location . . .” That was our wish at Wilshire Boulevard Temple for fifteen years, a wish that was realized. And with realization came a number of challenges and problems.

Our congregation, based in a downtown temple, had experienced a steady decline in membership throughout the early 1990s. Young families were moving out of the area,

and many who had grown up in our temple sought Jewish nursery schools close to their homes. (“We’ll be back when the kids grow up.”) There was a serious local economic recession. There was a major earthquake. There were the riots of 1992, leaving some members and prospective members wary of traveling “downtown.”

As a result, our board made a bold and far-sighted commitment: to establish an educational facility on the west side of Los Angeles, where an ever-greater number of our members live. The result was the purchase of a more-than-three-acre city block and the construction of an extensive school complex. The new facility was dedicated in December 1998, as a result of a highly successful fundraising campaign. Donors voted with their checkbooks, identifying with the need and the vision.

Located on a prime intersection in West Los Angeles, the new campus is remarkable. It includes a 250-student early-childhood facility; an elementary day school that will grow to 300, sharing classrooms with our religious school; a full gymnasium; specialty program rooms for art, drama, dance, computers, and libraries; numerous meeting rooms; and a chapel-auditorium.

“If you build it, they will come.” was the message of *Field of Dreams*. This has been our experience, as well. Our early-childhood program is full, and 250 more parents are involved in parenting programs.

Our religious school has almost tripled (!) in size, with classes on our downtown campus as well as three days a week on our new campus. Our elementary school has more than ninety students, growing one grade at a time.

Seven hundred people attend adult education offerings, from arts and crafts to yoga, from basketball to bible study. We have an extensive family support program from parenting to grief counseling. We have duplicate Shabbat and b’nai mitzvah services. Our membership has grown to a new record high.

Success? Resoundingly. But with the transition come a number of challenges.

● “Client” members. A well-established 140-year-old congregation, we were accustomed to members who joined for identification and stayed, many for life. A significant percent of our members join to qualify for our schools. Transitioning them into Temple membership has become a priority.

● Geographic members. We have one of the great sanctuaries of the world, but some of our members identify so greatly with the new campus that they have no relationship with our “downtown campus.” We try to program some major events, in addition to the High Holy Days, to connect them to our home Temple.

● Funding priorities. Building something wonderful and new makes something historic look older. Providing funds to keep our historic temple campus and our camps in Malibu updated is sometimes in competition with funding the new campus.

● Clergy involvement. Our rabbis are carefully scheduled to appear in a rotation on both campuses on all Shabbatot. But, until now, we had only one cantor, and that tended to make the “other” service seem less important.

● Administrative issues. It is not unusual for businesses to work from multiple sites, but the synagogue is not like other businesses. It has become important for me and my assistant to be on both campuses regularly, at least once a day for each of us. There is one management team. With an administrative center at our temple campus, we have had to facilitate mail service, provide telephone linkage through a

common switchboard, and coordinate purchasing. Facilities managers at each location supervise maintenance workers, but office workers receive less attention.

● **Program implications.** We cannot have one campus alive and one fading. Therefore, we program holiday observances at both campuses and on our third campus, our camps site in Malibu. The more we can move our constituency among the three, the more they will feel part of a common Temple family.

● **Building one staff.** It was once possible to have two or three luncheons a year for all full-time staff, including clergy, office, and maintenance workers. These programs let us say “thank you” after the Holy Days and welcome and bid farewell to new or retiring workers, thereby humanizing our relationships. With separate faculties for three schools and three maintenance staffs, that tradition has ended. We are still casting about for the “company picnic” or some other event to bring everyone together. Meanwhile, appreciation events for each of the staffs require planning and management attendance.

● **Building the image.** On all our publications, we list the locations of all three campuses. The familiar Temple logo appears on all maintenance uniforms. At all-congregation events, the teaching staffs and maintenance staffs move with some degree of comfort from campus to campus to provide assistance and support.

● **Avoiding competition.** We cherish a great sanctuary with Historic Landmark status. We have a more intimate, modern chapel on our new campus. Which is the “better” location in which to become a bat mitzvah? There is more congregational singing in the new, smaller venue; is it therefore “better” than the majestic Temple? Things change—liturgy, venue, customs, program locations—and each change brings discomfort for some members. These are not easy transitions to interpret and often require reassurance that the Temple remains fundamentally the same.

Some of these challenges were anticipated, but others were not. We try to address them all through appropriate means. We revel in our success while admonishing those who would emulate us to benefit from our experience. ●

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