HIRING GUIDE

Best Practices for Congregations
Hiring an Executive Director

NATA
National Association for
Temple Administration
Serving the Reform Movement

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Getting Started

The goal of the search process is to find the Executive Director (ED) best suited for your synagogue. There is no perfect position for all applicants, and there is no perfect applicant for any position. Through the search process, applicants and congregations get to know one another to find a match that will be mutually rewarding.

Before beginning the search process:

> **Establish and empower a search committee to define and engage in the search process.** Be sure roles, responsibilities, and ultimate decision-making authority ~~is~~are clearly defined and understood by the search committee members and congregation leadership.
>
> **Clearly define the scope of responsibilities for the ED position** related to the broad areas of management, leadership, and governance, and determine the key qualities, skills, and experience necessary to be successful in the role. This is critical for the development of an accurate job description and setting clear expectations for candidates.
>
> **Develop a detailed onboarding process** to ensure the new ED has the resources, tools, and support needed to adapt to the specific needs of your community while getting to know the staff and the congregation members. This may also involve an exit transition for an existing Executive Director and/or some overlap between the two.

Each of these areas are discussed in further detail in corresponding sections of this guide.

Additionally, **consider an alternate short-term plan** for managing the synagogue during this search process if necessary.

This may include assigning duties to other staff members, asking lay leaders to help out in certain areas, and/or hiring an Interim Director.

NATA maintains connections with a few experienced Executive Directors who are willing to take on short-term work assignments. Please contact the NATA office for more information and to discuss your specific needs.

Search Committee

Establishing the Search Committee

Typically, the temple President appoints the search committee and designates a chairperson. A thorough and well-thought-out search process will take months to complete. Potential committee members should be made aware of the time frame for the search and the time commitment to the process before agreeing to serve on the committee. A thorough and well-thought-out search process will take months to complete.

Confidentiality

The search committee walks a fine line between transparency and confidentiality. The committee should find ways to keep the Board and the congregation informed about its progress without revealing the candidates' identities until the appropriate moment.

Search committee members need to be advised of the confidential nature of the search. They may not independently speak to anyone about the candidate (including references) without the candidate's and the committee chair's permission, and they must keep resumes and other information and materials about the candidates in a secure place. All discussions and disagreements always stay within the committee.

Selecting Search Committee Members

The search committee should consist of approximately 4 to 6 members. Consider which constituency groups from within the congregation should be represented on the committee, and/or during the interview process.

NATA recommends including the following people on the committee:

- A current officer
- A current board member, hopefully someone with Human Resources experience
- Senior Rabbi and/or other staff
- Congregants from different constituency groups, such as religious school parents, nursery school parents, young adults, empty nesters, seniors, and long-standing members of the congregation.

As members are appointed to the search committee, one member should be designated as the single point of contact for applicants throughout the process. This person will be responsible for regular communication with all applicants.

The Board President should provide clear guidelines to the committee chairperson about how and when they are expected to report to the Executive Committee and/or Board about the status of the search.

Preliminary Work

To begin, the search committee should take time to reflect on the congregation's priorities and vision, and may choose to discuss some or all of the following topics as part of this preliminary work:

- The religious environment of the congregation. Does it matter if the candidate is not Jewish?
- Vision and mission of the congregation
- Congregation's strengths and weaknesses
- Key challenges of the next year, the next three to five years
- An idea of what the ideal applicant would be
- Core competencies and key personal characteristics that are required, and the essential functions of the position. Must this person have a financial background? Be able to multitask? Be able to communicate effectively in writing?
- What is the expected work schedule? Does this person work on Shabbat? During Religious School, especially if on a Sunday? Do they get a day off during the week? Can they work remotely from home?

- Will they attend Board and Executive Committee meetings? Staff those meetings? Staff other committees?
- Who should the candidates meet in addition to the search committee? This might include clergy and professional staff, administrative staff, members of the board and executive committee, and some representative congregants. At what point in the process do these meetings happen.

Timelines & Decision Making

The search committee should develop a schedule for conducting the search. Block out time for planning meetings and interviews, and plan to debrief and discuss candidates as soon as possible after meeting them. One effective practice is to schedule time immediately following each interview to discuss the candidate while they are fresh on everyone's mind.

The committee must determine how the final candidate selection and recommendation decision will be made.

- How will the applicant screening process work? Who will review resumes and how will determinations be made on who to invite for an interview?
- What questions will be asked and why? What does the search committee hope to glean from responses to each question?
- How will candidates be assessed? Will there be a numerical scoring system, or will another method be used?
- What kind of vote will it take to recommend a candidate to the Board and what are the Board's expectations for how and when the recommendation will be presented?

Lastly, it is prudent to plan for the possibility that a suitable candidate is not found. What will happen in that scenario?

Position Description

As noted in the introduction, the congregational leadership needs to define the Executive Director's scope of management, leadership, and governance responsibilities. Just as there are many kinds of congregations, there are many types of Executive Directors, with different levels of responsibilities related to governance and the internal operations of the institution. This is often culturally based and reflects historical perspectives, the role of lay leadership, and the role of other senior staff positions.

Before beginning the search process, it is important for the lay leaders to reach consensus about the scope of responsibilities of the Executive Director position so the search committee can be properly charged. It is equally important to have a clear understanding of how the Executive Director will work and collaborate with the lay leadership and the clergy. This conversation will generally involve the lay officers of the congregation and the Senior Rabbi.

If your congregation already has a job description in place from a prior or current Executive Director, it should be reviewed thoroughly to ensure it is an accurate reflection of the congregation's vision for the position in the future.

Basic Checklist

At a minimum, your job description should include:

- a brief summary of the position
- a brief introduction to your congregation and community
- a description of the key responsibilities of the position
- a list of qualifications, with core/essential qualifications listed first
- a compensation package including salary range and expected benefits
- instructions on how candidates should apply for the position

Title

What is the appropriate title for this position? According to the most recent NATA Compensation Benefits Report, more than 8 in 10 respondents reported they were an "Executive Director" and 11.1% were a "Temple Administrator." The description of "Executive Director" reflects an evolution in the nature of the position and the scope of responsibilities. This transition is continuing as congregations have increasingly complex needs and fewer available lay people to handle the multiple functions that need to be managed.

For a more detailed discussion of trends in titles and responsibilities, read the 2018 report by the UJA Federation, The Synagogue Executive Director: A Changing Role for Changing Times.

Organizational Structure

Who does the Executive Director report to and why? In most congregations, Executive Directors report to the President or some other lay officer (i.e., VP Administration), although in some congregations the Executive Director reports to the Senior Rabbi. Regardless of the formal reporting structure, a strong, positive, and collaborative relationship between the Rabbi and the Executive Director is crucial.

Who does the Executive Director supervise, and why? Depending on the size of your congregation, there may be many layers of staffing or none at all. Either way, a clear understanding of who reports directly and/or indirectly to the Executive Director should be established.

Job Duties & Responsibilities

What are the Executive Director's direct and indirect responsibilities regarding membership, development, communication, facilities, finances, education and programming, life cycle, ritual, cemetery, events management, committees and board relations, general administration, external community, and human resources? Whether it is their role to delegate tasks, collaborate with lay leaders and/or others, or perform specific duties personally, those expectations should be clearly defined and communicated in the job description.

What core competencies are required for the position? Understanding the congregation's needs and priorities is essential to determining what skills and experience should be highlighted in the job description. Do you need someone who has more financial management or membership engagement experience or both?

What is the Executive Director's responsibility to the Board, and the Executive Committee (officer group), and other committees? Establish a clear description of how the Executive Director is expected to interact with the Board and other volunteers to avoid misunderstandings and/or power struggles in the future.

Contract & Compensation

What is the salary, benefits, and compensation package? The package needs to be fair and reflect the requirements of the position and the marketplace. To help assess what is appropriate for your congregation, start by reviewing the most recent NATA Salary Surveys.

What is the initial hiring term (and who negotiates these terms)? Many Executive Directors have multi-year contracts. A typical scenario is 2 years for the first contract, then 3 or 5 years for subsequent contracts. Not all Executive Directors have contracts. If you choose not to offer a formal contract, a written letter of agreement should be executed to ensure both the congregation and the Executive Director have a clear understanding of the terms and conditions of employment.

Supporting Materials

In addition to the job description, the search committee should organize other materials that will assist candidates in understanding the unique needs of the congregation and the position. These materials could include strategic plans, mission statement, membership packet, religious school handbook, organization chart, temple bulletin, recent publicity, information about the area, audited financials, and budget information.

Some of these materials may go to any applicant who responds to the employment ad, and some of these materials (i.e., financial, organizational chart, etc.) may go only to candidates who are further along in the process. This is something that should be decided ahead of time so the person communicating with the candidates can establish a process for sending materials accordingly.

Recruitment

With your search committee, process, and job description in place, you are now ready to actively recruit candidates to apply for the position.

Posting the Job

Any congregation may post jobs on the NATA website at no cost. To request access to submit your recruitment notice on our job board, contact the NATA office. You will be provided with an invitation to login and submit your job posting electronically. For more information on this process, visit the Submit a Job Post page.

In addition, we highly recommend posting the job on a variety of websites to widen the search and attract as many qualified candidates as possible. Upon submitting a post to the NATA website, a confirmation email will be sent with additional recommendations for other posting sites.

Don't forget to post the job on your congregation website and social media channels!

Best Practices for Posting

When posting the position, be sure to include the following information in addition to the job description:

- Compensation Package - Transparency in hiring practices is essential to conducting a fair and equitable search, and for furthering the goal of gender and racial pay equity. Posting the budgeted salary range also saves time and frustration on the part of both search committees and applicants who go through the process only to find that their respective expectations on salary are not the same. Salary range is required to post on NATA's job board.
- Interview and/or Relocation Expenses - Be clear up front on whether you will cover all or part of a candidate's expenses for attending an in-person interview and/or relocating from another area to take the position.
- Timelines - Set expectations about when candidates can expect to hear from the search committee about whether they will be invited for an interview.
- Start Date - When do you want the person hired to begin work?

Screening Applicants

The search committee should establish the process for how applications will be circulated, screened, and selected for interviews. These determinations are part of the preliminary work described in a prior section of this guide.

Some things to consider when determining this process include:

How will applicant materials be shared/circulated within the committee, and when? For example, will you have a shared folder in a collaborative workspace like GoogleDocs or Dropbox? Will materials be shared as they are received or all at once after the application period closes?

How will candidates be assessed for an invitation to interview? Will there be a scoring system for evaluating resumes or will you look for general consensus from the group?

Communicating With Applicants

As noted earlier, there should be one point of contact person for all communications with the applicants. As applications are received and the committee determines who will be selected for an interview, remember to:

- Acknowledge receipt of each application within 24 hours and reiterate the timeline for making a decision about who will be invited for an interview.
- Send a rejection email to any applicant the committee determines will not be invited for an interview. You may want to hold off sending a rejection letter to anyone who falls into the "maybe" category until after you're sure they will not be invited for an interview.

Interviews

Some details of the interview process will depend on what the search committee decides in the preliminary planning stage about how to conduct the interviews. If you are doing initial phone screenings or holding virtual interviews, the process might be slightly different than if you are jumping right into in-person interviews.

Regardless of how many interviews are held or in what format, remember to maintain consistency in your practices throughout the entire process.

Preparing For Interviews

Continue to maintain the single point of contact by having the appointed person schedule all interviews and send follow up communications. This includes sending rejection notices throughout each step of the process. As soon as it is determined a candidate will not move forward in the process, they should receive an email thanking them for their interest and time and letting them know they are no longer being considered for the position.

While it is tempting to conduct free flowing conversational interviews, structured interviews and scoring rubrics have been proven to be more effective in assessing candidates and avoiding unintentional bias. To ensure a fair, equitable, and consistent process, have a list of standard questions to be used with ALL candidates for each step of the process. Do not deviate except to ask relevant follow up questions to an answer given by a candidate or restating the question in a different way for clarification if needed. Additional questions pertaining to internal candidates may also be added if you are interested in finding out how they view the current operational structure, culture, or other aspects of their experience within the organization.

Consider providing best practices training for committee members on how to conduct an interview. If some members of the committee have never participated in an interview as the interviewer, they may not be aware of the do's and don'ts of conducting an interview. There are questions that must not be asked for legal reasons, and information that should not be shared in order to maintain confidentiality of synagogue members and staff. All committee members should be fully aware of those areas before participating in the interview process. If no one on the committee has Human Resources experience, it would be prudent to hire a consultant or find another community member who can advise the committee on best practices for interviewing and hiring.

Formal Invitations to Interview

You may reach out to candidates via phone or email to let them know they have been selected for an interview and to schedule a date and time. Either way, once the date and time is fixed, a confirmation email should be sent and include the following information:

- Day, date, and time of the interview, and how long it is expected to last
- Location - physical address, online meeting link, or phone number, depending on the kind of interview to be held
- Names and titles/roles of each person they will be meeting with
- Any specific questions you'd like to provide in advance to allow additional preparation by the candidates

- Any other pertinent information about the interview process
- Request for the candidate to confirm the information via reply email

Conducting a Telephone Interview

Telephone interviews are not recommended unless they are used solely as an initial screening tool. This might be necessary in situations where there are a high number of qualified applicants, and the committee would like to ask some basic questions to get an initial sense of whether the candidate should be invited for the next level interview in the process.

In this case, only one person from the search committee should be on the phone with the candidate. It is standard practice to divide the list of candidates selected for a telephone interview equally among the search committee members. In this situation, it is acceptable for the person assigned to the candidate to reach out for scheduling, rather than the main point person as previous designated for all other communications.

Other standard practices for a successful telephone interview round include:

- Using a standard list of questions and instructing committee members not to deviate from the list. Since only one person is conducting the interview, this is the best way to maintain consistency across all interviews.
- In addition to documenting the applicant's answers to the interview questions, interviewers should note any questions the applicant asked and indicate if any follow up is needed.
- Before ending the call, let the candidate know what the expectations are for making a decision on the next level of interviews, and when they can expect to hear back from the committee.

If telephone interviews are conducted by individual committee members, be sure to schedule a debriefing with the full committee as soon as possible after the final phone interview is complete. It is important to discuss candidates while the meetings are still fresh on everyone's minds.

Zoom / Virtual Interviews

With the major changes in how the world does business resulting from the Covid pandemic, many congregations are conducting first round interviews via virtual meeting. Even as we learn to live with Covid and return to in-person activities, virtual interviews will still be an effective tool for initial interviews of candidates who live out of the area and are willing to relocate.

To help facilitate a smooth virtual interview process:

- Enable the waiting room feature in case the candidate logs on early.
- Ask search committee members and/or other interviewers to join the meeting at least 15 minutes early. This allows for audio and video checks and time to work out any technical glitches.
- During technical checks, make sure each committee member/interviewer can be clearly seen, backgrounds are appropriate, and cameras are positioned at a good angle. (You shouldn't be looking up anyone's nose or see only their eyes and forehead!)
- Remind committee members to keep themselves on mute when they are not speaking to minimize background noise during the interview.

- Decide who will be the main facilitator to keep the interview moving forward and mind the clock. This is typically the chairperson, but it does not have to be.
- Decide in advance in what order introductions will be done and who will ask which questions during the interview.
- Schedule virtual meetings so that at least 15 to 30 minutes is allowed following each interview for discussion of that candidate immediately following the meeting.

And, as with all interviews, before ending the interview, let the candidate know what the expectations are for deciding on the next level of interviews, and when they can expect to hear back from the committee.

In-Person Interviews

In person interviews may be your choice for the initial interview round, or it could be the 2nd or 3rd step in your hiring process.

If this is a 2nd or 3rd round interview, at this point you may also consider inviting people other than the search committee members to participate, such as the President, President-Elect, Senior Rabbi, and/or staff member.

Wherever you are in your process at this point, the main principles noted above for telephone and virtual interviews still apply.

- Maintain the single point of contact for all pre- and post-interview communications.
- Use a standard list of questions and stick to it as best you can, while probing for additional information with relevant follow up questions.
- Appoint a main facilitator to keep things on track.
- End the interview by letting the candidate know what to expect as far as next steps and timelines.

When scheduling back-to-back in-person interviews, be mindful to schedule enough time in between so candidates do not run into each other during the transition time. The best way to ensure this is to allow at least 30 minutes after each interview for discussion of the candidate immediately following the meeting.

Second and Third Round Interviews

Presumably, you are down to your top 2 or 3 choices by now. The nature of the second or third interview might depend on whether you started with a phone screening or if the entire process has been in person.

While best practices for the hiring process up to this point have been focused on uniformity, second and third round interviews allow for a little more flexibility with how the meeting is conducted. Often these are somewhat more conversational in nature and include more participants such as staff members and congregants.

Depending on where you are in your process, the second or third interview is a good time to:

- Take the candidate on a tour of the campus
- Introduce them to members of the administrative, finance, educational, and maintenance staff.

- Allow the candidate to provide their feedback on the process, ask questions, and/or share how they are feeling about the possibility of taking on the position.

If your community is interested in including a larger number of people in this part of the process, they might be divided into smaller groups the candidates can rotate through for a more intimate feel.

If inviting people outside the search committee to participate, consider providing them a list of acceptable questions to ask the candidate(s) and give them a brief overview of what things they may not ask or discuss. You'll also want to decide how you'd like these additional participants to provide their feedback and let them know in advance what that will be. Options include a written feedback form, an informal conversation immediately after the meeting, or scheduling a follow up meeting or phone call to discuss their impressions.

If after the second or third interview the committee is still not settled on a candidate, you may want to schedule additional meetings to address any concerns or have a more in-depth conversation with the candidate.

Until this point it has also been appropriate to advise candidates as soon as the committee decided not to move them forward in the process. Now that you are considering the final 2 or 3 candidates, it is recommended you not send any further rejection letters until your selected candidate has formally accepted the position unless the committee has determined they will not be considered under any circumstances.

Reference Checks

One of the big questions for congregations is, "When do we ask for references?" Some hiring managers ask for references as part of the application process, others wait until a final candidate is selected and ask for references prior to extending an offer.

Candidates often take it as a sign that they are being seriously considered for the position, so if you are not asking for references as part of the initial application process, then it is best to leave it until the final one or two candidates have been identified. References can be very helpful in making a decision if you are torn between two candidates.

Who Checks References?

Members of the search committee should conduct the reference checks. This task can be divided in a variety of ways, depending on what will work best for your committee members and your timeline.

1. One committee member could be assigned to check all references for each candidate.
2. Different committee members could be assigned to check all references for an assigned candidate.
3. Reference checks can be equally or otherwise divided up amongst numerous committee members to speed up the process.

Format

Reference checks may be conducted via phone or in writing. Sending questions to references in writing ensures all the same questions get asked for each candidate. However, having a telephone conversation with the person can often reveal a lot more information about the candidate.

Either way, remember to:

- Be consistent and conduct the reference check in the same format for each candidate if possible.
- Create a script for phone calls or draft an introduction for emails, especially if the work is divided among several committee members.
- Provide a little information about the nature of the job the candidate has applied for and/or provide a copy of the job description.
- Include an assurance to the person being contacted that it is a confidential process, and the candidate has given permission for them to be contacted.

Questions to Ask

- How long have you known the candidate, and in what capacity?
- What are the candidate's strengths and weaknesses?
- What made the candidate successful when you worked with them?
- (If applicable) Given the opportunity, would you hire the candidate again?
- Based on the description of the job we provided, do you think the candidate would be successful in this role? Why or why not?
- What other information would be helpful to us in making our decision?
- May I contact you again with further questions if needed?

Extending an Offer

Once the final candidate is selected, the search committee will follow the appropriate process (as determined during the preliminary planning phase) for getting the approval and authority to extend an offer of employment.

Upon receiving final approval, the search committee chair or other designated person should contact the candidate via telephone to share the happy news and to formally extend the offer for the position.

Negotiations

During this call, you will want to provide all the information relevant to the terms and conditions of employment, including salary, benefits, contract period, etc. The person making the call must have a clear understanding of what authority they have to negotiate any terms of the initial offer. If no authority is given and the candidate asks for something different than is offered, it may require more than one call to finalize the agreement.

Once the terms are agreed upon, a confirmation email should be sent including the terms of the agreement. It takes a bit longer to draft and finalize a formal contract or employment agreement, so this email is just an interim step to make sure everyone is on the same page with regards to what agreements were made.

We strongly recommend any formal written agreement be reviewed by a labor law attorney in your local area before sending it to your new employee for their signature. You may also want to be prepared for additional negotiations once the written agreement is drafted.

Recommended Terms and Conditions

NATA recommends a formal contract, drafted or reviewed by an attorney, to clearly define the mutual expectations of both the congregation and the Executive Director. Even without a formal contract, the following elements of an employment agreement are recommended for new Executive Directors.

SALARY AND BENEFITS

- Initial engagement of two or three years, with provisions for contract renewal.
- Fair and equitable salary based on professional experience, job requirements, and the marketplace, with provisions for salary review and increases throughout the term of the contract. (Review NATA's most recent salary surveys for market information.)
- Plan for performance evaluations - when, how, and by whom will performance be assessed
- Medical and dental insurance coverage (smaller congregations can explore the new ICHRA option)
- Pension/401k/403b contribution of 15% (Reform Pension Board is available for NATA members affiliated with URJ congregations.)
- Reimbursement of work-related and travel expenses
- Free synagogue and religious school membership
- Moving allowance, if applicable
- Annual Professional Development / Continuing Education allowance, including NATA membership and conference attendance
- Four weeks of paid vacation time per year
- At least 8 days of paid sick time per year
- Paid Jewish and National holidays
- Family leave and long-term disability insurance

ADDITIONAL CONTRACT CLAUSES/PROVISIONS

- Job description attached as an appendix to the formal agreement.
- Confidentiality clause to ensure the privacy of congregants.
- Conflict of Interest provision that describes potential conflicts and how to prevent and/or report them.
- Termination clauses to explain what, if any, benefits or severance may be provided depending on the circumstances of the termination.
- Arbitration / Mediation expectations for conflict resolution.
- Governing law to clearly identify the jurisdiction where the contract will be interpreted.

Background Checks

NATA strongly recommends conducting background checks for all new hires. Any offer of employment should be made contingent on the results of the background check, and new employees should not begin work until the background check has been completed.

Onboarding

Once the final candidate is selected, the search committee will follow the appropriate process (as determined during the preliminary planning phase) for getting the approval and authority to extend an offer of employment.

Upon receiving final approval, the search committee chair or other designated person should contact the candidate via telephone to share the happy news and to formally extend the offer for the position.

Wrapping Up

What worked? What didn't? How might the process be better in the future?

These are all questions that any task force or special committee should ask when their work is complete. It's good to assess and provide a summary report to the Board, so that if the same or a similar situation arises in the future, the new search committee can benefit from the experience of what happened during this hiring process.

Resources

Additional resources to help you prepare for your Executive Director search and hiring process.

Leading Edge - Detailed guides for hiring and creating job descriptions, as well as a long list of additional resources.

The Management Center - Practical hiring tools and worksheets your team can download in GoogleDoc or Word format to customize for your search.

Board Source - Guides, tools, templates, and infographics related to transition and succession planning for executives.

Workable - Templates and checklists for creating job descriptions, interview questions, email communications, and more.

Article – Understanding employment contracts versus at-will employment agreements.

Reform Pay Equity Initiative - Find educational resources, examples of best practices, and comprehensive tools to help close the gender wage within our community and beyond.

Family and Medical Leave - Policy standards for the Jewish Community by the Women's Rabbinic Network.