



THE STAFF REALIGNMENT PROCESS FOR YOUR CONGREGATION

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Introduction - Why Align?

In 1977, Alfred Chandler wrote a wonderful book on the history of strategic decision making at the highest levels of Corporate America. He included companies like DuPont, General Motors, Standard Oil and Sears Roebuck. The book was called *The Visible Hand: The Managerial Revolution in American Business*. In his book, Chandler created a maxim that has been followed as doctrine by strategists and consultants since it was published. The maxim is actually quite simple: **“Structure follows Strategy.”** What Chandler argues is that all aspects of an organization’s structure should be made while keeping the organization’s strategic intent in mind.

He provides a wonderful example of this concept at work. In the mid-50’s, General Motors organized its entire business around 5 separate car divisions; Chevrolet, Pontiac, Oldsmobile, Buick and Cadillac. As shown, they are listed them in order of pricing segments (Chevrolet was the cheapest brand, Cadillac was the most expensive. The idea was that General Motors would then have a car for every single segment of the market place. This is an example of structure (five divisions) following strategy (target your customer base, differentiate your brand for your competitors, be competitive).

Synagogues, by their very nature, are not all that different. We are segmented into a number of different departments (communications, worship, life cycle, facilities, membership engagement, education, etc.), and then are further segmented into smaller mini-departments (adult education, teen learning / youth groups, preschool, religious school, for example). We have an overall strategy (our vision and / or mission statement), and we have structures that ‘follow’ the strategy.

If your structure is not working, or is ‘out of alignment’, it is difficult (but not impossible) to fully and completely fulfill your mission. Or, if your mission changes as the result of a strategic planning process, for example, it may be necessary to make changes in order to realign your staff to the new

plan. Or, if a key member of your staff leaves (Development Director, for example) who may not have been overly successful in his / her role, it may be time to either alter the role, or to eliminate it completely and realign your staff in order continue your development efforts.

Put another way, and in keeping with the car company analogy, as with the wheels of an automobile, the parts of a business or organization need to be in the correct position relative to each other (aligned) in order for it to function properly

Most of the time, organizational change involves some minor changes to the various boxes on an organization's organizational chart in order to accommodate a personnel change or changes, for example, or to find a way to support a new program initiative. However, this process leaves the rest of the staff in their current role(s), that may or may not provide a good fit. Sometimes, the process of changing the chart results in greater productivity and efficiency. More often than not, it creates confusion and discontent. What's really needed is not simply moving around or changing the wording in boxes on the chart, but realigning staff into the right roles. Put another way, many leaders tend to ignore the strategy, structure, process, and people elements or pieces that can and should be part of any effective realignment. In other words, they rearrange the deck chairs but fail to see that the boat may still be sinking.

Oftentimes, employees who are hired to do one job have the skills and experience to perform others, as well. This is particularly true in not for profit organizations, where individuals often come from a variety of backgrounds and may have worked in a number of different positions or in related fields. In addition, as employees become more familiar with your organization and are given more responsibility, they may develop new interests and skills. Your program director may discover they have a knack for leading teams and would like more management or supervisory responsibilities.

Your graphic designer with an English degree may be interested in improving your organization's social media platform. If you don't go through the process, you won't have the opportunity to learn about your staff; their new skills, their evolving interests, and their changing passions, and where those might fit into your organization.

Healthy organizations can and should realign staff roles from time to time (and not just in times of crisis or major change) in order to account for these shifts in skills, interest, experience and function, and to ensure that their overall staff structure continues to meet the strategic needs of the organization.

Realigning staff can also address a number of other challenges, including (but certainly not limited to) the following:

- Changing demands on the organization (programmatic, financial, etc.)
- Major change(s) in personnel (key employee, like Senior Rabbi, retires)
- Aligning staff structure with mission / strategic plan (if either has recently changed)
- Changing demographics within your membership
- Increase efficiency
- Eliminate redundancy
- Identify / fill gaps in employee skills / abilities
- Identify gaps in services
- Make better use of staff talent and skills
- Save money by either reducing expenses or increasing revenue
- Improve communications
- Improve decision making (speed / internal / external)
- Break down internal silos; improve collaboration within and across departments
- Create consistency in job titles, roles and responsibilities, job descriptions
- Update organizational chart

Sadly, the tendency in many organizations is to ‘leave things alone’, or to fall on the adage that ‘we’ve always done it that way, so why change it now?’ Or to decide that the timing isn’t right, or that the resources to make changes aren’t available. If the realignment process means letting a staff person go, it can be particularly difficult. It is one of the many reasons why organizations often avoid this process altogether; they don’t want to have to make difficult (but necessary) decisions.

The world we live in, and the role that synagogues play in people’s lives is evolving so quickly, that we owe it to our leadership to regularly step back and look at our staffing structure, and realign it to make sure that it continues to effectively and efficiently support the mission and goals of the organization. Having said that, synagogues must be crystal clear, at the outset, about what the realignment is intended to achieve, and to ensure that these goals and aspirations are inextricably linked to strategy.

The Temple Sinai Experience

Why did we choose to re-align our staff? In December 2015, as we approached our 50th anniversary, our leadership and senior staff team began to consider three significant questions:

- Who are we today?
- What aspects of the changing Atlanta and American Jewish landscape are likely to shape our future?
- Who do we aspire to become over the coming decade?

A core team of 13 congregants (based on age, sex, level / scope of engagement, years of membership, past leadership experience, kids in / not in our school programs, etc. – chosen by our Senior Rabbi, Executive Director, Education Director and Executive Committee), 3 temple staff (Senior Rabbi,

Executive Director, Education Director) and a paid consultant defined three primary goals of what came to be called the “Imagine Sinai” initiative:

1. To understand the context in which Temple Sinai, Atlanta currently operates – both the external trends as well as our internal strengths and challenges
2. To engage congregants in an honest, open, and creative conversation about what Temple Sinai could become in the future
3. To articulate a compelling future vision for the congregation – one that guides priority-setting and inspires increased engagement over the coming years

Over the course of 7 months, more than 500 congregants were engaged through one-on-one interviews, small group conversations, a Town Hall meeting, a Board of Directors meeting, and a day-long “Vision Summit”. Every single member of the congregation was invited to participate in the summit. The smaller conversations were organized by ‘user’ groups. For example, we had a group of K-6 Religious School parents; we also had a group of K-6 parents who did NOT have kids in our school. We did our best to cover all of our demographic groups. We were prepared (and often did have) to offer multiple sessions, so that all voices could be heard. In addition, core team members analyzed existing congregational data from our database and studied local and national trends impacting Jewish community life.

Based on these findings, the team (led by our consultant) crafted a Temple Sinai vision for 2025 and identified ten initial strategies that would enable the temple to realize this vision. Both the vision statement and strategies went through several iterations as they were vetted with various constituent groups and stakeholders, including congregants, preschool parents, religious school parents, board members, staff, and clergy (including many of the same groups that we spoke to during the interviews / small group gatherings).

Our Findings... (Or Setting the Stage)

Temple Sinai is a vibrant, 1,550 family congregation. We are fortunate to have a long history of gifted clergy, committed lay leadership, active congregant engagement, and solid fiscal health. As we looked to the future, it was important to understand these strengths, as well as the current and emerging realities (challenges and opportunities) we and many other congregations were facing, and will continue to face in the future. While it's easy to look at any given trend and conclude "good news" or "bad news," our visioning work was an opportunity to develop a roadmap that would help us navigate the landscape both proactively and creatively. Our fundamental goal was to become even more responsive to the needs of our members and community.

What we found can be synthesized into 7 key areas or categories. Why these particular ones? They closely aligned with our three primary goals:

1. To understand the context in which Temple Sinai, Atlanta currently operates.
2. To engage congregants in an honest, open, and creative conversation about what Temple Sinai could become in the future
3. To articulate a compelling future vision for the congregation

I would argue that our goals, and therefore our key categories are applicable to most (if not all) synagogues in the county, and should form the basis of any strategic planning effort.

1. **DEMOGRAPHICS** Young adults and families are affiliating with synagogues less than in previous generations, and are feeling less personally connected to synagogues, including Temple Sinai, when they do affiliate.
2. **COMPETITION** More competition within the Jewish community, including a growth of 'a la carte' options, could have an impact on the level of affiliation. As denominational identity (e.g. Reform, Conservative) wanes in importance, Temple Sinai 'competes' with a broader range of congregations for members. In addition, the JCC, day schools, community rabbis, and specialized niche service providers (e.g., Jewish Kids Group) are increasingly addressing specific religious, educational, and life cycle needs, particularly for younger generations.

3. **CONGREGANT EXPERIENCE** Personal relationships, a sense of connection, and a feeling of welcome are the most important variables in defining a congregant's experience. Many congregants, across every demographic, find it harder to connect with one another and to get involved at Temple Sinai. Congregational size, as well as the present culture are often cited as barriers to connection.
4. **TECHNOLOGY/COMMUNICATIONS** Effective use of technology can both facilitate communication and strengthen the sense of community. Though heavily programmed, Temple Sinai needs to find ways to reach and communicate offerings to our membership more effectively. In addition, social media, website, and other technology are underutilized as a medium to foster and strengthen connectivity amongst members and with the clergy.
5. **SPIRITUALITY/WORSHIP** Spirituality and worship must continue to expand and evolve in order to meet the needs of our diverse membership. Present delivery of services, a perceived lack of age-appropriate youth and family experiences, and inadequate opportunities for engagement in conjunction with services contribute to the low priority that worship plays in the lives of most of our members.
6. **CLERGY** Quality of and connection to clergy are of utmost importance to members' individual experiences and contribute to the overall strength of the congregation. Temple Sinai has been blessed with a long history of strong clergy and rabbinic stability. Effective rabbinic attention will remain an important variable in both attracting and serving congregants in younger demographics.
7. **FINANCIAL NEEDS** Current synagogue financial models are being challenged as unsustainable, impersonal, and unsatisfactory. Perceived value of affiliation is being questioned, particularly amongst younger demographic groups who now have access to less expensive alternatives to meet their Judaic needs, as well as competing priorities for limited resources. Additionally, some members feel there is an over emphasis on financial need and an expectation of annual support that is unfairly distributed.

From these seven categories, 5 key vision themes emerged (see below) that described who we collectively want to be as a community in 2025. These themes have driven our strategy and priorities for the past 4 years, and will continue to drive them for the foreseeable future.

Temple Sinai Vision Statements

In 2025, Temple Sinai:

- **Is a congregational family where we all feel known and valued.** We are an inclusive community that nurtures meaningful relationships, personal friendships and a deep sense of connection in all areas of synagogue life.
- **Provides diverse pathways to deepen Jewish spiritual experience.** Through inspiring worship and music, and an environment rich with intentional sacred moments, we find personal meaning and ongoing opportunities to explore our faith.
- **Creates learning experiences that inspire a love of Jewish life.** Our exciting and innovative learning experiences connect kids, teens, families, and members of all ages to each other, to Temple Sinai, and to the greater community, and enable them to live as confident Jews in the 21st century.
- **Attracts and engages a vibrant community of adults and families in their 20s and 30s.** Younger members find a place for themselves within the Temple Sinai community, and are engaged in shaping every aspect of congregational life.
- **Is an integral and relevant part of our lives, both within and beyond the walls of the synagogue.** Our innovative approaches enable us to connect personally and spiritually, wherever we are and whenever we need.

From these 5 vision statements, 7 core strategies and 2 enabling strategies emerged.

Core Strategies

1. Institutionalizing practices to foster a culture of relationship in every aspect of the congregant experience
2. Intentionally curating varied experiences that enable congregants to deepen their Jewish spiritual lives
3. Creating a Center for Learning and Engagement that enables youth, teens, adults and families to build meaningful experiences throughout their Jewish educational journey
4. Facilitating the formation and support for neighbourhood-based and affinity-based congregant gatherings/groups

5. Creating social, educational, cultural, and spiritual experiences that engage families
6. Facilitating the creation of customized “Sinai Journeys” for members of the congregation
7. Researching, prototyping, and piloting initiatives to meaningfully engage with 20’s and 30’s

Enabling Strategies

1. Implementing state-of-the-art technology to enhance personalized communication, connection, and real-time opportunities for involvement
2. Enhancing Temple Sinai’s campus to allow for easier physical access, increased connection, and more diverse and meaningful spiritual experiences

Finally, we determined the order or sequence of the ten core strategies.

Strategy Sequencing Plan

For the purpose of implementation, we organized the ten core strategies into two tiers. We decided to initially focus time and resources on tier one strategies because we believed they would a) create early and visible “wins” in congregant experience, building support and enthusiasm about the vision and b) differentiate Temple Sinai from “competitors,” c) establish the foundational processes and learning required for second tier strategies to succeed.

Tier 1 Strategies (focus of first two years)
Create a culture of “relationship” by institutionalizing practices that foster meaningful connection in every aspect of the congregant experience
Create and nurture experiences that engage families socially, educationally, communally, and spirituality
Create a customized “Sinai Journey” for every member of the congregation, supported by a database, communications system, intact groups, and programming
Research, prototype, and pilot initiatives to meaningfully engage with 20s and 30s on their terms
Intentionally curate varied experiences aimed at enabling congregants to deepen their Jewish spiritual lives
Tier 2 Strategies (initiated after tier one strategies have traction)
Implement state-of-the-art technology to enhance personalized communication, connection between congregants, and real-time opportunities for meaningful involvement. Ensure specific

emphasis on how “digital natives” access and connect to one another and to their preferred institutions
Facilitate the formation and support for neighborhood-based small congregant gatherings
Enhance Temple Sinai’s campus to allow for easier physical access, increased connection amongst congregants, and more diverse and meaningful spiritual experiences
Facilitate the formation and support for affinity-based small congregant gatherings and/or groups based on a community-organizing process
Create a Center for Learning and Engagement that engages youth, teens and families to build meaningful experiences throughout their Jewish educational journey

Realigning The Temple Sinai Staff

Given the complexity of ““Imagine Sinai”,” and the multiple goals that were associated with the visioning statements and core and enabling strategies, we felt it was important for us to bring in an outside consultant (Rabbi Lou Feldstein from Dynamic Change Solutions). His primary focus was to help us determine our overall, evolving staffing needs, and the best approach for implementing the various recommendations that were related to current and future staffing patterns. We knew what we wanted to do (strategies), we knew when we wanted to do it (sequencing), but we weren’t sure, in terms of our staff, how to best get there.

The fundamental goal of our work with our consultant was to create a detailed analysis of our current staffing model to help us determine whether our current staff were deployed effectively, and if new positions should be added / existing positions eliminated, or whether responsibilities should be shifted between some combination of current and new positions. We also wanted to identify areas of inefficiencies, redundancies and potential cost saving, create consistency in job descriptions and job

titles, and to then provide the congregation with an optimum staffing model (both short term and long term) to achieve the objectives of the “Imagine Sinai” project.

The methodology was fairly straight forward.

1. **Assemble a Project Team** – Based on the advice of our consultant, we assembled a Project Team that included the Executive Director, the Education Director and the Operations Director - all chosen because all staff either directly or indirectly report to one of these individuals. He wanted the team to be small and nimble, and to cover all aspects of our operation.
2. **Setting the stage** - We knew that as soon as we mentioned ‘staff realignment’ or ‘staff restructuring’, some of our staff were going to become uneasy or would begin to worry that their job may be at risk. For many employees, ambiguity can lead to fear, and fear can lead to uncertainty. We sat down with our staff (both collectively and individually) and introduced them to the realignment process. We also shared the “Imagine Sinai” summary documents, so that staff would have a clear understanding of the overall strategic direction we were moving in, and what was driving the realignment process. The process is by its very nature, somewhat ‘top down’. Having said that, in an effort to be as inclusive as possible, we brought our staff into the process as soon as was humanly possible. We felt that it was vital that our staff understand the why (why are you looking at the current staff structure?), the how (what will the process look like?), the when (what is the timeline for the project?), the who (who is involved in the process – Leadership? Clergy? Senior Staff? Other staff?), and finally, what is the expected outcome when the process is completed?

By clearly communicating with our staff at the beginning and throughout the process, we gained their support and buy-in. I cannot emphasize this next point enough: We did our very

best to be completely transparent about each and every aspect of our work. There is one other reason for transparency throughout the process; should one or more staff positions need to be eliminated, you will have a clear rationale for the decision that is tied to the strategic goals of the organization, and not a particular individual's job performance, personality, friendships, etc.

- 3. Analyzed Our Current Staffing model.** In order to move ahead, we needed to know exactly where we stood. We gave every staff person (including our clergy) at the temple a copy of their most current job description, along with a Job Description Revision form (see Appendix 'A'). We didn't worry if some or all of the job descriptions that we had on file were inconsistent in their format / style – we addressed this issue this later in the process. We asked each staff member to complete the revision form as accurately and as honestly as possible, to include as much detail as possible, and return it to our Executive Director. We provided clear deadlines, and offered support and assistance in completing the form, if requested. We asked them to indicate what items in their current job description were no longer applicable, or were no longer part of their day to day / overall responsibilities. They were also asked to share what, if any, new responsibilities were part of their job / role that were not part of their original job description, and what (if any) skills they possessed that they had acquired since they were initially hired. And finally, they were asked to include information about any added responsibilities they had picked up over time that were not formally associated with their position. **Collecting this information was the most critical / important part of our entire realignment process. The goal was to gain a broad, accurate understanding of who was doing what; not what their job description said they were supposed to be doing, but the actual work each staff person did on a day to day basis. It is**

critical that the information you collect is accurate. If a staff member was struggling with the revision form, we offered to sit down with them, and/or to have their immediate supervisor sit down with them to offer guidance and suggestions.

4. **Dig a Little Deeper.** Our consultant then reviewed all of the job descriptions and the accompanying Revision Forms and both individually and collectively interviewed the members of the Project Team and our President Elect, our Senior Rabbi and our Treasurer, to better understand our current staffing configuration (number of staff, individual roles and responsibilities, etc.) and the potential need for new functions. This step was included in order to capture what wasn't included in the Job Descriptions and Revision Forms, and to better understand what the Senior Leadership of the congregation was thinking. It was deliberately done AFTER step 2; the consultant wanted the job descriptions and Revision Forms in hand during the interview process, so he could identify inconsistencies, ask more direct questions, and put together an overall vision of our current 'state of affairs' in advance of Step 4.
5. **Codified It.** In collaboration with the Project Team, the consultant then created a detailed Functions Map (see Appendix 'B'), which was then reviewed by all Senior Staff for additional input and adjustment. The purpose of the Functions Map was to provide a visual representation of our current staff's roles and responsibilities. This was by far the most time-consuming aspect of the project. The Functions Map went through a number of iterations and revisions over several weeks. We wanted to get as much input as possible, and at the same time, ensure that the map was a true and accurate representation of both our tasks (roles and responsibilities) broken down by key areas, and our staff (broken down by individual positions).

6. **Identify Challenges.** Using the completed Functions Map (see Appendix 'C') and information gathered during the job description review process and the interviews, our consultant then identified overlaps in responsibilities, redundancies, gaps, inefficiencies and capacity concerns. This information was shared with the Project Team in order to address questions and discuss their thoughts and reactions.
7. **Identify Solutions.** Finally, the consultant (based on all of the above) created a revised organizational chart for the temple with major recommendations, revised recommended job descriptions, revised job titles, along with a full, written report. (See Appendix 'D' for our original Organizational Chart, and Appendix 'E' for our revised Organizational Chart).

Key Findings (what did we learn?)

1. There was (and continues to be) a very strong professional commitment amongst our staff members to 'get the job done', so to speak, which was exemplified by their 'can-do' and 'will do' attitude.
2. We came to the conclusion that based on the objectives of the "Imagine Sinai" project, our current staffing model was undercapitalized. Put another way; we were understaffed and under-budgeted.
3. All of our staff were stretched to the limit; the amount of work they had been doing had been steadily increasing; everyone was working harder and doing more.
4. There were gaps (things were either dropped or missed) , despite the fact that everyone was working incredibly hard.
5. We concluded that the job descriptions we had for virtually all of our staff were inaccurate, out of date, had not been updated in several years, and/or were inconsistent in terms of their

overall format and style. Many of the job descriptions looked more like job postings, rather than being an accurate description of the roles and responsibilities related to the job.

6. Virtually all of the job descriptions were lacking a signature or accompanying agreement from the staff member that they accepted the job description as written, and that it met their expectations in terms of the work they were expected to do (or were already doing). Note that this is more of a legal issue rather than a functional issue; ultimately, we chose to ignore this recommendation.
7. The lack of accurate and complete job descriptions made it challenging when it came time for performance reviews.
8. There was inconsistency in job titles; most did not accurately represent the framework or responsibilities related to the position.
9. We also discovered that there were salary range overlaps. However, for the purposes of this paper, I will not be addressing those issues.
10. There is a very strong sense of comradery amongst our staff; however, the culture of collaboration that has made us so successful, is at times being challenged by departmental silos.
11. Many staffing decisions (retaining of personnel, reporting relationships) reflect historic and interpersonal dynamics, rather than sound, strategic decision making.
12. When we took a close look at the functions grid, we discovered that there was significant overlap in a number of roles and responsibilities. This was perhaps one of the most striking aspects of the entire project. For example, we had 9 staff members who were involved in event registrations. We had 5 staff members handling stock transfers. We had 14 staff

members who were in some way, shape or form involved in equipment and supply ordering.

And in several instances, supervisory and reporting relationships were muddy, at best.

Next Steps (what did we do?)

The next part of the process was the implementation phase. Armed with revised job titles (see Appendix 'F'), revised job descriptions, an updated organizational chart, a set of clear recommendations from our consultant, and a renewed sense of purpose, we set about putting the plan into action.

The Project Team met and began the difficult work of creating a finished staff model that incorporated all of the consultant's recommended changes. The new model included the elimination of 2 positions), the addition of 2 new positions (See Appendix 'G' for the form we used to describe new positions, and some major and some minor changes to existing job descriptions and supervisory roles. (See Appendix 'D' for our pre-alignment organizational chart, and Appendix 'E' for our post-alignment organizational chart).

Once we knew the 'who' and 'what', we began working on the 'how' and the 'when'; what would be the timeline for the entire process, from start to finish. Clearly, we were not going to make all of the changes at once; that would be far too disruptive, and was completely unrealistic given the scope of the changes. We also needed to bring our lay leadership into the process, given that there were budgetary considerations for some of the changes, and that there were going to be some disruptions as long-serving people left the organization, and new people were hired.

As part of our work, we created a number of different scenarios for what the process might look like; we knew it was possible that people were going to choose to leave sooner than we planned, or leave because they didn't like the changes being made to their role within the organization, or that it would

take longer than we would have liked to find the right people for the new positions. We classified each 'change' or realignment based on the level of need, and focused on the areas of greatest need first. We then created actual scenarios that followed the 'if this happens, then we'll do that; if that happens, we'll do this' model, and began with the most pressing need first, and moved on from there.

This took place over approximately 6 months, and included one on one meetings with all staff, the creation of job postings, working with staff whose jobs were being eliminated to support them during their transition, communicating with our congregation about the ongoing changes, keeping our lay leaders apprised of our progress, etc. We made sure that we continued to listen to our staff; we knew the actual transition was going to be challenging, and wanted to make sure that we did everything we could to make it as smooth and seamless as possible.

Outcome

Despite some minor setbacks along the way, we believe that we achieved all of the goals that we established at the start of our realignment project. If you will recall, our goals were to:

1. create a detailed analysis of our current staffing model to help us determine whether our current staff were deployed effectively, and if new positions should be added / existing positions eliminated, or whether responsibilities should be shifted between some combination of current and new positions.
2. identify areas of inefficiencies, redundancies and potential cost saving, create consistency in job descriptions and job titles, and to then provide the congregation with an optimum staffing model (both short term and long term) to achieve the objectives of the "Imagine Sinai" project.

Through our process, and over the course of the past 2 years, we have accomplished the following:

1. Addressed the changing demands on our organization (programmatic, financial, etc.)
2. Realigned our staff structure around the “Imagine Sinai” vision statements and strategies
3. Increased overall efficiency by eliminating redundancies in a number of positions
4. Identified and filled gaps in employee skills / abilities and gaps in member services
5. Improved internal communications and decision making
6. Broke down internal silos and improved collaboration within and across departments. (note that this is a work in progress)
7. Created consistency in job titles, roles and responsibilities and job descriptions
8. Updated our organizational chart to more accurately reflect our staff structure

The process is ongoing. As staff come and go (which is inevitable in an organization our size), we continue to modify our staff structure based on our ever-changing needs, the skills and abilities of our staff, and the need to stay relevant in the lives of our congregants.

Overview – Staff Realignment Process for your Congregation

- 1. Answer the WHY question.** Before you begin, you need to have a clear understanding of ‘why’. Why are you realigning your staff? What are your goals? What do you hope to achieve at the end of the process? Did you recently complete a strategic plan? Are you hoping to eliminate overlap, which is very difficult to do in a small congregation, given that you generally have fewer employees? Are you looking for greater efficiency? At the risk of sounding a bit dramatic, I truly believe that if you can’t easily articulate an answer to the ‘why’ question, your efforts will be wasted.
- 2. Bring your leadership into the fold.** You will not succeed if you don’t have complete buy-in from your lay leadership and clergy partners. You need to make sure they agree with and support your goals, and that they will actively and willingly participate in the process. It will be up to you to determine who should be at the table; President? Treasurer? President-Elect? Vice President(s)? Board members?
- 3. Use this document as a guide.** Every synagogue is different; our reporting structures are different, our priorities are different, our demographics are different. You are in the best position to determine what your process should look like. Use this document as a roadmap, but with one caveat; you need to take the time to create your own roadmap that includes your reporting structures, your priorities, your demographics, etc.
- 4. Set the stage.** Bring your staff into the process. As I stated earlier, as soon as you mention ‘staff realignment’ or ‘staff restructuring’, your staff will get nervous. It is vital that you share with your staff the why, how, when and the who, along with the expected outcome(s) at the conclusion of the process.

- 5. Analyze Your Current Staffing model.** You need to know where you stand. Give every staff person (including your clergy) a copy of their most current job description, along with a Job Description Revision form. Ask each staff member to complete the revision form as accurately and as honestly as possible, to include as much detail as possible, and return it to you. Set clear deadlines and offer support and assistance, if requested. Ask them to indicate what items in their current job description were no longer applicable, or were no longer part of their day to day / overall responsibilities, and to share what, if any, new responsibilities were part of their job / role that were not part of their original job description. Ask them to include information about any added responsibilities they had picked up over time that were not formally associated with their position. As I stated earlier, collecting this information is the most critical / important part of the entire realignment process. Given the significant overlap in job responsibilities that exists in smaller congregations, it is critical that you collect accurate information on who is doing what; in other words, the actual work each staff person does on a day to day basis, and the skills that they have in their 'toolbox'.
- 6. Dig A Little Deeper.** You'll need to then review all of the job descriptions and the accompanying Revision Forms and then meet with your Senior Leadership. Again, this might include your President, Rabbi and Treasurer (or some other configuration of lay leadership / Senior Staff based on your own structure). The goal is to fully / better understand your current staffing configuration (number of staff, individual roles and responsibilities, etc.) and the potential need for new functions, or for current functions to change. The general idea is to try to capture what wasn't included in the job descriptions and Revision Forms, and to better understand what the Senior Leadership of the congregation is thinking.

- 7. Codify It.** Create a detailed Functions Map based on your job descriptions and Revision Forms and review it with your Senior Leadership for additional input and adjustment. You can use the version of the map that we created during our realignment process as a guide. However, you will need to customize it to make sure that it accurately covers all of the various tasks and functions that are part of your day to day operations. (See Appendix 'H' for a fairly comprehensive list to give you a place to start). Explain to your Senior Leadership that the purpose of the Functions Map is to provide a visual representation of your current staff's roles and responsibilities. And remember – this will be the most time-consuming aspect of the project. It can and should go through a number of iterations and revisions over the span of several weeks.
- 8. Identify Your Challenges.** Using the completed Functions Map and information gathered during the job description / revision form review process, identify overlaps in responsibilities, redundancies, gaps and clear inefficiencies. Your conclusions should be shared with Senior Leadership in order to address questions and discuss their thoughts and reactions.
- 9. Identify Solutions.** Using all of the information you've gathered, and in consultation and coordination with your Senior Leadership, do the following...
- a. Create an updated Organizational Chart
 - b. Revise all job descriptions (including both form and content - See Appendix 'I' for a sample job description)
 - c. Redo the Functions Map based on your updated Organizational Chart and revised job descriptions to ensure that all major functions are covered, and that you've eliminated any / all redundancies
 - d. Create an Implementation Timeline that takes into account the following:

- i. How many and which positions are being eliminated?
 - ii. How many and which positions are being added?
 - iii. What resources do you have to implement the various changes?
 - iv. How long will it take to train new staff?
 - v. What changes to the facility (office space, technology, etc.) will need to be made to accommodate the changes
 - vi. How much notice / severance are you planning to give staff who are being let go? How will that affect your timeline?
- e. Present your new Organizational Chart, Functions Map and Implementation Timeline to your Executive Committee / Board of Directors for final approval

10. Implement Your Plan

- a. Meet with each staff person individually to share your results. Discuss in detail significant changes their job description and day to day responsibilities. Do not discuss other staff / job descriptions; the focus needs to be on the individual, and his / her role in the organization.
- b. Meet with your staff collectively to share your results, including your new organizational chart (so everyone is clear on who reports to who) and new Functions Map (so everyone understands who is doing what), and to lay out your implementation plan.

11. Evaluate Your Results (see #1 – did you answer the ‘Why’ question?)

Six months after you’ve started to implement your plan, take a step back and evaluate your results. It is up to you to determine what this process might look like. Take the time to meet with each staff person and ask them for their impressions of the new structure. Ask leading questions

and avoid specifics; you're looking for a general sense of where they are and what they think. For example:

- How are you adjusting to the changes?
- What improvements have you noticed?
- Where do you see opportunities for additional changes to improve our work together?
- How can I continue to support you in your new role?

You should undertake a more detailed evaluation process after one full year. At that point in time, and perhaps as part of your annual review process with all of your staff, I would review each person's (revised) job description to ensure that it now accurately reflects the work they are actually doing on a day to day basis. I would solicit specific feedback on the realignment; both the outcome and the overall process.

You should also meet with your Lay Leadership to seek their input on the effectiveness of the realignment from their perspective. Have the overall goals been met? Have the 'why' questions been answered? Are your operations more effective / efficient?

Finally, I would pull out your Functions Map to ensure that everyone is doing exactly what they're supposed to be doing, and that there hasn't been any 'role drift', where responsibilities have either intentionally or unintentionally shifted from one person to another. This can best be accomplished as part of the annual review process, as well. Use the revised Job Description for each staff person and go through the same process that you went through initially; review that they are currently doing, what their job description says they should be doing, and reconcile any changes (drift) that may have taken place since their last review.

You may need to do some minor adjusting of roles / functions based on changes that may have taken place within your organization during the year. However, I would argue that your Functions Map should be your guide and that any changes be minor, at most.

There will be differences in how you approach this process depending on the size of your congregation. For example, there is generally far less overlap in roles and functions in a large synagogue than exists in most smaller or mid-sized synagogues. This will make the realignment process more challenging and more time consuming; you're dealing with many more people, more departments, more supervisors, and more roles and functions. You may want to consider working with a consultant (as we did at Temple Sinai) to guide your process.

A final thought.....

I found a great piece by an author named Jeff Boss in an online posting by Forbes Now. (Forbes Now (online); January 21, 2018). Jeff suggests that there is a simple flow for thinking about organizational alignment. Even though Jeff is talking about a corporate environment, I do believe that what he says is the exact way we should be thinking about alignment (and realignment) in our own congregations.

According to Jeff (these are his exact words from the article)....

1. “Align the employee with the role.

There's nothing worse than having the right person in the wrong role. In my experience, the reason companies waste talent is because they don't have the right conversations to begin with. If you want a better answer, ask a better question. Ask your people what motivates them, why they're doing what they're doing, where they see themselves in three years and what might happen if they don't get there. Set the conditions for candor now to prevent the loss of talent later.

2. Align employee roles within the team.

One of the performance requirements for groups (and teams, for that matter) is clear roles and responsibilities. It's hard to hold somebody accountable if you don't know what they do or what they're responsible for, and without accountability there can be no shared accountability (a defining characteristic of a team). Aligning team roles prevents turf wars or the "that's not my job" retort that stifles output."

3. Align the team with other teams.

It doesn't matter how great your sales teams perform if your marketing teams fail to get the message out, and vice versa. Seismic, an enterprise level software technology provider whose mission is to help marketing and sales teams work better together, says that only 16% of companies have sales and marketing teams who collaborate. What impedes alignment between teams, they say, are disparate systems, lack of transparency and visibility on goals, and skewed expectations—all of which fall under the umbrella of poor communication.

Research also shows that companies with aligned marketing and sales teams experience an average of 20% growth in annual revenue. Another report shared by Cerius Executives shows that aligned companies are 38% better at closing proposals and churn 36% fewer customers each year.

Alignment doesn't come easily. It takes time, courage and candor to have the conversations that need to be had yet oftentimes avoided because it's easier not to. Start by getting clear on what success looks like for each team, how it will be measured and the process by which you'll communicate. The very process of communication itself is the stepping-stone toward organizational alignment."

So, what did I learn? First, that I don't have all the answers. Bringing others into the process (including our consultant) was incredibly helpful. Second, there is more than one way to approach my work. This process has allowed me to take a much broader view of the work I do on a day to day basis, and to not be afraid of change. It's forced our organization to be much more focused on our single greatest asset – our staff. We do more training (individual and group focused), more sharing, more listening and more collaborating. And finally, I've become much more forward thinking (and more strategic in my planning). Any changes, even minor ones, in our staffing model are carefully

considered in the context of the entire team. I believe that I'm better and what I do because we took the time, invested the energy and resources, and listened to our coworkers to create a more effective, cohesive staff team.

Good luck!

Resources

With special thanks and gratitude to Rabbi Lou Feldstein – Dynamic Change Solutions
lou@dynamicchangesolutions.com

Tel. (404) 606-6755

www.dynamicchangesolutions.wordpress.com

Additional Resources

Bodinson, Glenn & Kendall, Kay. *Leading the Malcolm Baldrige Way: How World-Class Leaders Align Their Organizations to Deliver Exceptional Results*. New York: McGraw-Hill Professional Publishing, 2016

Burton, Terence T. & Moran, John J. *The Future Focused Organization: Complete Organizational Alignment for Breakthrough Results*. Upper Saddle River, NJ: Prentice Hall, 1995

Chandler Alfred D. *The Visible Hand: the Managerial Revolution in American Business*. Boston: Belknap Publishing, 1993

Hart, Jonathan. *Strategic Business Realignment: How to Manifest Abundance in Your Business*. London: AuthorHouse UK Ltd., 2006

Labovitz, George & Rosansky, Victor. *Rapid Realignment: How to Quickly Integrate People, Processes, and Strategy for Unbeatable Performance*. New York: McGraw-Hill Professional Publishing, 2012

Laloux, Frederic (Author) & Appert, Etienne (Illustrator). *Reinventing Organizations: An Illustrated Invitation to Join the Conversation on Next-Stage Organizations*. Boston: Nelson Parker Publishing, 2016

JOB DESCRIPTION REVISION FORM

Current Title: _____ Previous Title (if applicable) _____

Person completing Form: _____ Date: _____

Responsibilities on current job description no longer applicable: (continue on back if needed):

New / Added responsibilities not on current job description: (continue on back if needed):

Added Responsibilities not formally associated with position:

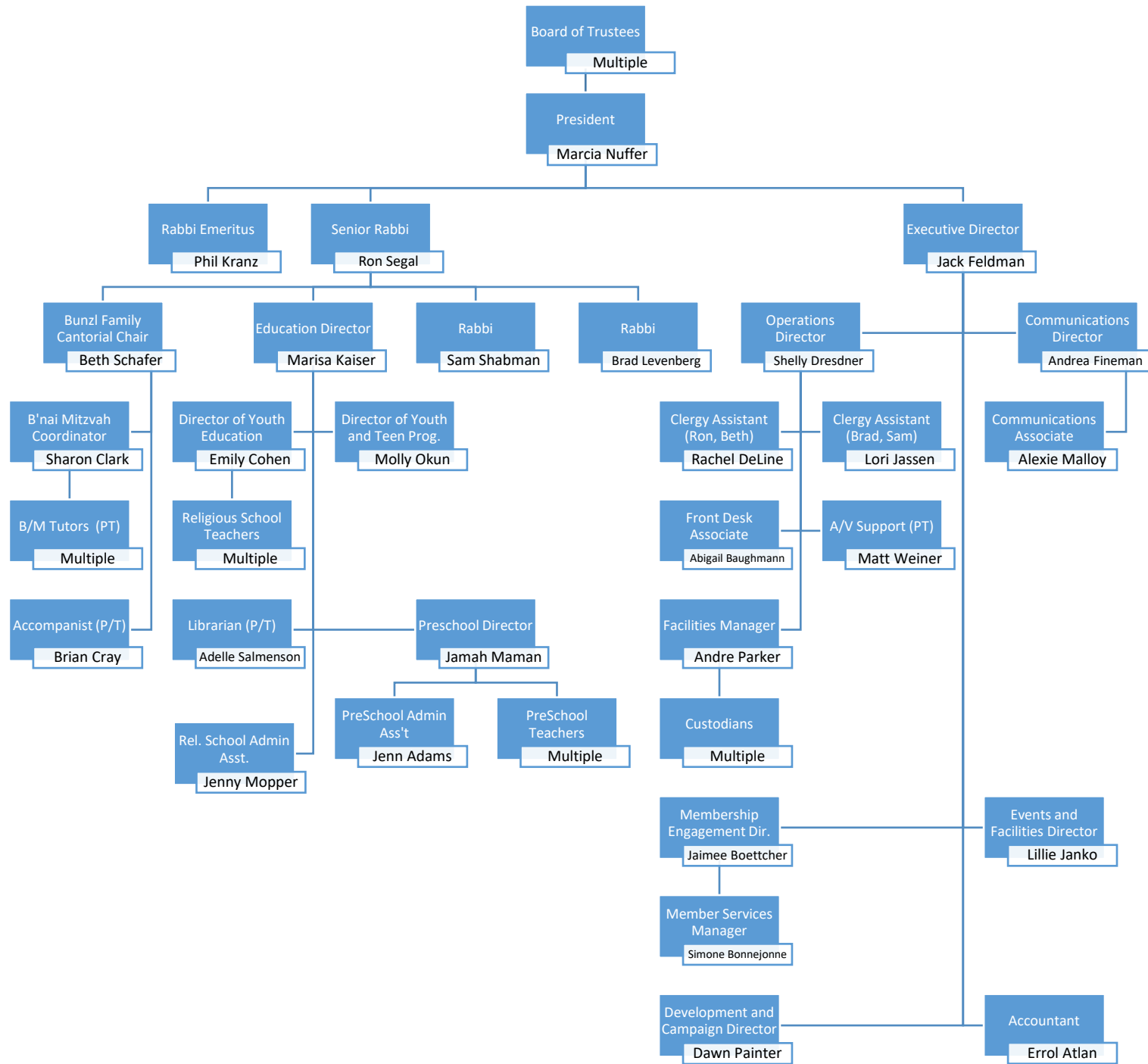
TEMPLE SINAI STAFFING ASSESSMENT FUNCTION GRID - DRAFT 6.14.17

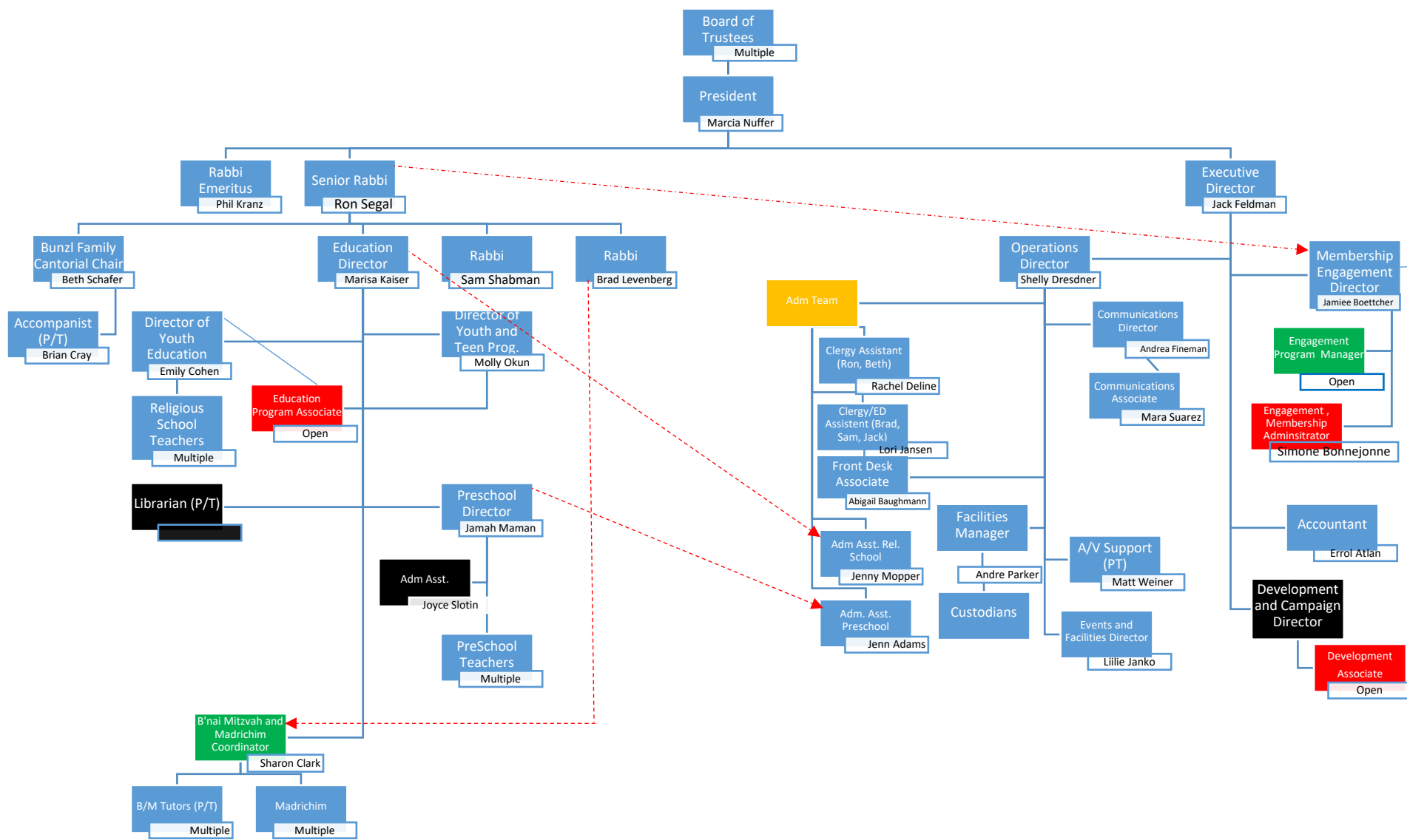
	Executive Director	Senior Rabbi	Assistant Rabbi 2 (Brad)	Assistant Rabbi 1 (Sam)	Cantorial Soloist	Clergy Asst. (Ron, Beth)	Clergy Asst. (Brad, Sam)	Operations Director	Events and Facil. Dir.	Front Desk associate	Education Director	Rel School Adm. Asst. (Mopper)	Dir. of Youth Ed.	Dir. of Youth and Teen prog.	B'nai Mitzvah Coordinator	Librarian	Pre-School Director	Pre-School Ad. Asst.	Part-Time Admin (Joyce)	Communications Director	Communications Associate	Membership Engagement Dir.	Member services manager	Dev. & Camp. Dir.	Accountant
General Admin																									
Archive Management																									
Office Supply inventory/Ordering																									
Scheduling and Space Allocation																									
Calendar input																									
Personnel Management/supervision																									
Schedule Meetings and Coordination																									
Equipment/Supply Ordering																									
Answer Calls																									
Lost and Found																									
Database Management																									
Registration Management																									
Plaque and Award Prep																									
Open Doors (buzzing)																									
Data entry																									
Senior Staff Meetings																									
Facility Management																									
Building and Grounds maintenance																									
Kitchen Supply Inventory / Ordering																									
Program Logistics																									
Facilities Management																									
Facilities Rentals																									
Meal Ordering/Catering																									
Billing Inquiries																									
Annual Renewals																									

Lifecycles
Lifecycle Calendar/Scheduling
Lifecycle Coordination
Lifecycle Facility Needs
Lifecycle Family Needs
Lifecycle Supplies
Yahrzeits
Education
Curriculum Development
Education Implementation
Education Planning/Strategy/Vision
Teacher Supervision
Adult Education
Scholarship Management
Tzedakah Collection
Social Action
Social Action Strategy
Social Action Event Coordination
Social Action Participation
Program
Program Logistics (non-facility)

Blue	Blue	Blue
White	White	White
White	White	Green
Green	Green	Green
Yellow	White	White
Yellow	White	White
Yellow	Yellow	Yellow
Yellow	Yellow	Yellow
White	White	Yellow
Yellow	Yellow	Yellow
White	White	White
White	White	White
Grey	Grey	White
Orange	White	Orange
Orange	White	Orange
Orange	Orange	White
Orange	Orange	Orange
Orange	Orange	Orange
Orange	Orange	Orange
Blue	Blue	White

Program Planning
Program Visioning/Strategy
Trip Coordination





Eliminated Positions
Reconfigured
Proposed Position

Staff Title Changes - working document

	Current Title	New Title
Jack Feldman	Executive Director	Executive Director
Shelly Dresdner	Operations Director	Associate Executive Director
Changing (retirement)	Facilities & Event Director	Event & Rental Manager
OPEN	Accountant	Accounting Manager
Andre Parker	Facilities Manager	Facilities Manager
Jaimee Boettcher	Membership Engagement Director	Director of Member Engagement
New Position (F/T)		Program & Engagement Manager
Simone Bonnejonne	Member Services Manager	Member Engagement Manager
Andrea Fineman	Communications Director	Director of Communications
Mara Suarez	Communications Associate	Communications and Graphic Design Associate
New Position (P/T)		Digital Marketing Associate
Marisa Kaiser	Director of Education	Director, Center for Learning & Engagement
Jamah Maman	Preschool Director	Director of Young Family Learning & Engagement
Emily Cohen	Director of Youth Education	Director of Youth Learning & Engagement
Molly Okun	Director of Youth & Teen Engagement	Director of Teen Learning & Engagement
New Position (F/T)		Librarian and Adult Education Coordinator
Sharon Clark	B'nei Mitzvah Coordinator	Director of B'nai Mitzvah Program
Rachel DeLine	Executive Assistant to Clergy	Senior Clergy Assistant
Abigail Baughman	Front Desk Associate	Front Office Assistant
Lori Jassen	Assistant to Clergy	Executive Assistant
Jenny Mopper	Administrative Assistant Religious School	Center for Learning & Engagement Assistant
Jennifer Adams	Executive Preschool Assistant	Preschool and Young Family Learning & Engagement Assistant
New Position (P/T)		Executive Director Assistant

STAFFING ASSESSMENT FUNCTION GRID - CURRENT CONFIGURATION

	Executive Director	Senior Rabbi	Associate Rabbi	Assistant Rabbi	Cantorial Soloist	Clergy Ass't (Sr. Rabbi / Ass't Rabbi)	Clergy Asst. (Assoc. Rabbi / Cantor)	Operations Director	Events and Facilities Director	Front Desk associate	Education Director	Religious School Admin. Ass't	Director of Youth Education	Director of Youth & Teen Prog.	B'nai Mitzvah Coordinator	Librarian	Pre-School Director	Pre-school Admin. Ass't	Part-Time Admin.	Communications Director	Communications Associate	Membership Engagement Dir.	Member services manager	Development & Campaign Dir.	Accountant
General Admin																									
Archive Management																									
Office Supply inventory/ordering																									
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Facilities Rentals																									
Meal Ordering/Catering																									

ORGANIZATION NAME

JOB DESCRIPTION

POSITION TITLE: Graphic Designer **FLSA:** Exempt

DEPARTMENT: Administration

REPORTS TO: Vice President of Events / President and CEO

LOCATION: xxxx

SALARY: Commensurate with experience

PRINCIPAL FUNCTION: Under the general direction of the Vice President of Events and the President and CEO, the graphic designer is responsible for developing and designing consistent messaging and branding to engage the community, grow participation, and retain and grow the donor base.

Core Responsibilities:

1. Manage the Organization brand across both print and digital media.
2. Develop and design both print and digital media, including invitations, flyers, programs, signs and banners, annual report, brochures, direct mail solicitations, newspaper ads, etc.
3. Design and deliver marketing materials in print and digital format to promote a wide variety of programs, events and activities to community constituents.
4. Assist with management of content on **organization name** websites and perform design maintenance and design updates as needed.
5. Update weekly production schedule so colleagues can track project deadlines.
6. Maintain brand identity and consistency through implementation of organization-wide standards, procedures and protocols to protect the use of the mission statement, logo, tag line, brand requirements, etc.
7. Promote the mission of **organization name** at all times through superior customer service to all and through the efficient use and care of all resources.

QUALIFICATIONS:

- Associate's Degree in graphic design or commensurate professional experience.
- Solid skills, practical design and production experience in graphic design.
- Candidates must have a portfolio with multiple examples of work.
- Proficiency in the Adobe Creative Cloud, including InDesign, Illustrator, Photoshop and Dreamweaver. Working knowledge of HTML, DHTML, CSS, PHP, MySQL, JavaScript.
- Demonstrated ability to take art direction, feedback and critiques effectively.
- Experience with designing websites, banners, and animations.
- Understanding of overall web site design, including basic usability, industry standards, architecture and navigation.
- Exceptional verbal and written communication skills.
- Proactive & self-motivated, flexible, highly organized, collaborative.
- Ability to manage multiple projects at one time, under tight deadlines.
- Knowledge of organized Jewish community, its practices and values encouraged.

Employee Signature: _____ **Date:** _____

Employee Name (Print): _____

Supervised by: _____

Title: _____ **Date:** _____