

RABBIS AND SYNAGOGUE ADMINISTRATION

Practice and Problems

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A study of synagogues in the San Francisco area revealed several trends in synagogue administration: the emerging role of the rabbi as the CEO of the congregation and its leader in matters both spiritual and profane; the development of a professional position of synagogue administrator; and greater efforts to rationalize dues negotiation and collection procedures. The extent to which synagogues deepen their relationships with federations in efforts to enhance Jewish continuity will partly depend on their effective management.

In pursuing its commitment to Jewish life in the San Francisco Bay Area, the Koret Foundation has recently made major grants in support of synagogues. One of these grants makes available technical assistance on issues related to synagogue administration. In preparation for this technical assistance Koret invited several congregations to participate in an effort to determine patterns of synagogue administration and to identify perceived administrative problems. Four synagogues agreed to participate in this effort. These congregations range in size from under 200 membership units to over 1,000 and include the three major synagogue movements. Each of the congregations has a full-time rabbi and a full- or part-time staff person who is nominally in charge of synagogue administration. Each has at least one full-time person in charge of educational programs. Although each of the congregations is partially dependent upon fund raising to meet budgetary targets, each is also heavily dependent upon membership dues as a basic source of income.

In each congregation the following lay and professional leaders were interviewed: the current and/or past president of the congregation, the primary rabbi, the person charged with administrative responsibility, and the director of education for children. In addition, in all except one congregation I attended a meeting of the board or the executive committee.

THE ADMINISTRATIVE ROLE OF THE RABBI

In their rabbinic education, rabbis do not receive much preparation for their role of providing administrative leadership and yet lay congregational leaders seem increasingly ready to see their rabbis as the chief executive officers (CEOs) of their congregations. Reference to the rabbi as CEO was made repeatedly in my interviews with lay leaders. And the larger the congregation, the more likely was the reference made.

Occasionally reference was made to a model of rabbinic leadership in which the rabbi's domain is the religious life of the congregation, with all administrative responsibility resting with lay leaders and hired office staff, including someone carrying the title of administrator or office manager. In practice, this division into areas of the sacred and the profane seems not to work. Rabbis supervise staff (including office managers and administrators), they provide leadership in the preparation of budgets, they sit, as a matter of job requirement, as advisors to their boards of directors and executive committees, they provide staff leadership to standing committees of the board, and they engage in fund raising for operating and capital fund purposes. Perhaps the most interesting finding in this regard is that the administrative role of the rabbi is less constrained by the structure and expectation of the congregation than it is by

the rabbi's own definition of which administrative duties he or she is comfortable with. Rabbis are looked to for administrative leadership. And often this expectation is spelled out in the hiring process for a new rabbi. In the search process, rabbis are questioned about their skill in supervising others, their willingness to engage in fund raising, and their capacity to serve as advisors to boards and executive committees in conducting the business of the congregation. In fact, in one of the synagogues observed, the current rabbi, in the course of being interviewed, was told that the congregation was unhappy with how the prior rabbi had avoided administrative responsibilities. The current rabbi assured lay leaders that he was interested and competent in administrative areas.

Despite this strong trend toward defining the rabbi as both spiritual and administrative leader, there are certain tensions in this role definition. Some of the tension is generic to all lay and professional relationships in nonprofit organizations. Professional staff, particularly rabbis with multi-year contracts or even tenure, can be seen as being in a contest for leadership with newly named lay leaders. It was reported to me that one rabbi was specifically asked to be less forceful at board meetings. And some lay leaders regard rabbis as "innocents" when it comes to the business of running a congregation. For indeed, among other things, a congregation is a business. And where the rabbi is seen as an innocent, it is likely that his or her advice will be discounted.

It is my perception that rabbis with an interest in administrative matters and a personal style that is comfortable with administrative leadership will find ample opportunity to exercise that leadership. And given current developments, the opportunities for administrative leadership by the rabbi are evolving into an expectation and a requirement that the rabbi will serve as both spiritual and administrative leader.

There is one critical area of administration from which the rabbi has been specifi-

cally excluded and/or operates informally, sometimes without the sanction of the board of directors. This area involves the negotiation of reduced-membership dues and the collection of dues that are in arrears. Dues negotiation and collection are critical because such a large percentage of members belong on a reduced-fee basis and because income from membership is such a major part of all congregational budgets. If the rabbi is uncomfortable with or is blocked from dealing with the setting and collection of dues, he or she is separated from one of the central administrative problems facing all congregations.

These varieties of practice in other important administrative areas affect the administrative role of the rabbi as well:

- *Attending and voting at board and executive meetings:* In no instances did the rabbi have a vote on the governing body or even consider asking for the right to vote. However, there is a clear expectation that the rabbi will attend board and executive meetings, although I did observe situations where such meetings took place without the presence of the rabbi. Apparently in those situations meetings were scheduled without clearing with the rabbi's schedule, or the rabbi decided there were more important things on his or her calendar. There appeared to be no consistency in professional behavior of the rabbis at board meetings or the board's expectation of that behavior, which ranged from passivity to the taking of strong positions on certain issues. If the rabbi is emerging as the CEO of the synagogue, the rabbi's performance at governing body meetings does not seem commensurate with the role of CEO. Too often the rabbi seems passive on critical issues, or he or she operates in the context of having been privately warned about being too aggressive. And in some congregations, the rabbi is present at board meetings by "invitation" rather than expectation. By invitation seems to imply the possibility of

being disinvited, if the rabbi's behavior is viewed as intrusive.

- *Setting the agenda for board and executive meetings:* Some rabbis meet regularly with the synagogue's president and are active in helping set the agenda for governing body meetings. In other cases, meetings are erratic, and the rabbi is not a consistent party to agenda setting. I was not able to observe any clear pattern of performance on the part of the rabbi in this area.
- *Participating in staffing board committees:* The rabbi always participates in (and perhaps dominates) the Ritual Committee. There is a clear understanding and agreement that practices connected to the religious life of the synagogue are in the rabbi's domain. However, ritual practice, particularly as it involves the participation of non-Jews in synagogue rituals, is an area of increasing complexity in synagogue decision making. The rabbi and congregation lay leaders may bring very different values to decisions affecting synagogue ritual.
- *Hiring, firing, and supervising synagogue employees:* This is an area of practice in which every synagogue "makes Shabbos for itself." The one area of relative consistency is the hiring of the rabbi, for which the governing body always makes the key decision, accompanied by some effort by the membership-at-large to sanction the hiring. Hiring and firing practices for personnel other than the rabbi vary by congregation. There are some positions for which the rabbi has sole hiring authority, although the rabbi is likely to seek lay leadership advice; there are other cases where the rabbi and the board or the executive committee have joint hiring authority, and there are some cases, particularly regarding the hiring of an administrator, where the sole hiring authority rests with the board. And there is an equal variety of practice with regard to the firing of personnel. In one synagogue the rabbi

could veto the hiring of the administrator, but had no formal role in that person's discharge. The rabbi is almost always responsible for evaluating key personnel, although in some cases board members or the chairperson of a standing committee also participate in the evaluation process.

Although I did not anticipate this much variety in the rabbi's participation in the hiring, firing, and evaluation of personnel, I hardly expected uniformity. There are varieties of personnel practices in all organizations. What does seem critical to good administration is that all of those involved—lay leaders, the rabbi, and affected personnel—have a common understanding of established practice. This is not always the case in the synagogues I observed.

ROLE OF THE SYNAGOGUE ADMINISTRATOR

There seems to be strong movement toward the development of a professional position of synagogue administrator, particularly in larger congregations. The administrator seems to combine both management and financial responsibilities for the congregation. He or she manages the maintenance of the facility, the synagogue's office procedures, and its financial affairs, including the tracking of operating expenditures and the collection of dues and fees. In one synagogue the administrator had important authority in negotiating reduced fee arrangements and in bringing arrears to the attention of the board.

As mentioned earlier, dues establishment and collection are critical to the financial health of a synagogue. Nevertheless, dues procedures are often managed in erratic, unpredictable, and sometimes inequitable ways. Competent synagogue administrators will likely become powerful forces in the rationalization of dues procedures. Yet, the movement to rationalization is likely to be slow and difficult because of the extensive involvement of lay leaders in dues proce-

dues. Perhaps the greatest stumbling block to rationalizing dues management, however, is the lack of common agreement about what a rational dues system would look like.

The role of the synagogue administrator varies in different congregations in these areas of practice:

- *Board participation:* Some administrators are invited to attend board meetings; others are not. If invited, their role tends to be passive. In one case the synagogue administrator took board meeting minutes. Attendance at executive committee meetings varies.
- *The operating budget:* A key responsibility of the administrator is bringing the synagogue's year-to-date financial operating experience to the attention of the board. This can be done by briefing the appropriate board leader in advance or by a direct presentation to the board.
- *Relationship to the rabbi:* In all of the observed cases but one, the synagogue administrator is responsible to the rabbi. However, in some cases the administrator is also responsible directly to a board member, who is likely to be the vice-president for administration, and that person participates in the evaluation of the administrator.
- *Staffing of board committees:* In one case the administrator staffed four board committees (membership, dues, fund raising, budget). In other cases the administrator seems to be viewed as a technician whose staffing of board committees would be inappropriate. In all cases the administrator is expected to be a source of current information to board leaders on dues, arrears, and other aspects of financial management.

THE BOARD AND THE EXECUTIVE COMMITTEE

Congregations face the generic problem of what authority, if any, the executive committee has in synagogue decision making.

The counterpart to that problem arises when board members perceive that key issues have been essentially decided at the executive committee level, with the board asked merely to provide pro forma approval. Inappropriate executive committee power or at least the perception of such does not seem to be a problem in any of the synagogues I observed, although my conclusion might be different had I interviewed board members who are *not* members of the executive committee. There were reports of such tensions between board and executive committee in the past.

In the synagogues I observed, there are clearly different patterns of allocating authority to an executive committee. These differences become problematic when there are differing perceptions as to where the authority for decision making lies. In at least one of the synagogues observed there was continuing discussion and confusion about the powers of the executive committee vis-a-vis the board. Other varieties of practice and possible problem areas include the following:

- One congregation thought it important for the education director to attend all board meetings.
- All boards and board presidents seem concerned with the effectiveness of communication with congregants. I did not focus on the question of communications as an administrative issue, although a prior study had indicated that communication with members was seen as an issue of great importance by rabbis.
- As mentioned earlier, boards have varying authority in the hiring process for different personnel. In two congregations the executive committee also served as a personnel committee and shared certain hiring authority with the rabbi. Boards seem most interested in maintaining independent access to the administrator, thereby bypassing the rabbi, and through that person to the financial condition of the congregation. The motiva-

tion for this independent access may be benign—to shield the rabbi from having to deal with money matters. Or it may betray a lack of confidence in the rabbi's ability to handle financial oversight.

Whatever the motivation, it is hard to reconcile some of these practices with the emerging conception of the rabbi as CEO.

MEMBERSHIP AT LARGE

The general membership of the congregation has certain powers that are usually exercised through an annual meeting. Such powers are likely to include the adoption of an annual budget and the election of officers. Most often such authority is exercised in pro forma fashion in the annual general membership meeting. In my own experience I am hard pressed to remember contests for election at an annual meeting or even serious attention devoted to budgetary issues. However, based on my interviews I found that general membership meetings can be very lively around the decision to hire a new rabbi or to terminate a rabbi. One congregation even reported that the general membership had granted the rabbi a raise in salary over the objections of the board. Another congregation noted that the hiring or firing of a rabbi requires a two-thirds vote at a general membership meeting and that the general membership meeting must approve all dues increases and contracts by the synagogue. Except for this one congregation, which seemed to pride itself on the decision-making authority of its general membership, it would be hard to describe the membership at large as having any vital role in synagogue administration.

BUDGETING, FUND RAISING, AND DUES ADMINISTRATION

All of the congregations observed have dues and fees as their major source of income, and precisely because of this the process by which dues are established and collected and the procedures for dealing with arrears are all central in the administrative life of a

synagogue. In addition to income from dues, each of the four congregations proposes to meet some portion of its income from annual fund-raising efforts. Such fund raising is generally programmatic, such as dances, trip, auctions, and the like. Fund-raising efforts can generate a fair amount of administrative burden, and there was no dominant pattern for the staffing of fund-raising programs. The professional responsible for the program is likely to be the staff person closest to the program, or the rabbi, or the administrator, or all of them. My impression is that a fair amount of programmatic fund raising in the synagogues is carried out by membership with minimal involvement of professional staff.

The primary categories of budget expenditure are salaries and other program expenses. Salary constraints are likely to be established by the board or executive committee, and program budgets are developed by relevant standing committees. Most of those interviewed seemed to agree that a synagogue's budget committee is the crucial force in attempting to reconcile competing demands before the budget is presented to the board. Some have suggested that the budget committee is the most powerful force in determining the budget; others note the final authority of the board, and in one synagogue, the membership-at-large seemed to have more than a pro forma role in budget adoption.

The role of the rabbi in budget adoption is less clear. In one congregation the rabbi and the administrator, under the leadership of the rabbi, developed a common budget strategy and then worked within the board and committee structure to influence the adoption of the budget. In contrast, in at least one congregation the rabbi was the sole staff person guiding the adoption of the budget, and there was one congregation where the rabbi seemed to have been deliberately marginalized in the adoption of the budget.

Two other aspects of budgeting are of note, although my observations are incomplete. Congregations seem not to budget

deliberately for a deficit. Adopted budgets, on their face, seem to be balanced, but emergencies occur and income projections are not met. One congregation invaded its reserve funds to cover a deficit; others embarked on emergency fund-raising efforts with "big givers." One rabbi made clear to me that he was willing (and pleased) to be involved in assisting with fund raising for capital expansion purposes, but was unwilling to be involved in any fund raising directed to covering operating deficits.

The four synagogues in this study, and synagogues generally, seem to have three major income streams: membership dues, an assessment or voluntary gift for a building fund, and educational fees. Membership dues and educational fees are subject to negotiated arrangements in all congregations. Building fund assessments are generally related to membership dues; if dues are negotiated downward, the assessment for the building fund is also adjusted. In at least one of the congregations, a gift to the building fund is voluntary and is not necessarily related to the level of membership dues.

In many cases, building fund gifts and assessments represent a substantial source of synagogue income, and in some sense such funds can also represent "walking-around money." If building funds are not directed toward a planned capital project, they can and are used to take the pressure off operating budgets by paying for maintenance work and for the purchase of items arbitrarily classified as capital expenditures. And as noted, building funds can occasionally be invaded to meet operating deficits, presumably with an obligation to repaying the fund.

The establishment and management of a dues procedure seem the most fragile part of synagogue administration. Conflict and tension are inherent in seeking synagogue members because of the nature of the marketplace.

At any one time, some 25% of those who are nominally Jewish are members of syna-

gogues. This 25% are divided into two major categories: those who are members in order to enable a Jewish education for their children and those for whom synagogue membership is an integral part of their identity. They are Jews, therefore they are synagogue members, or vice versa. For many Jewish adults, normative synagogue dues and fees of \$1,000 to \$1,500 annually pose a difficult financial burden.

In short, the synagogue requires \$1,000 to \$1,500 per year from a minimum of 150 members in order to support a full-time rabbi, a subsidized educational program (where fees do not cover the cost of the program), and the purchase and maintenance of a facility. Into this market come five kinds of consumers:

1. the great bulk of Jews (some 75%) who at any one time say one or a combination of the following: "It's not worth \$1,500 to me," "I can't afford \$1,500 and I'm not interested in negotiating a lower price," "I'll use the synagogue selectively—like buying High Holiday seats," or "affiliation at almost any price is unimportant to me now"
2. those who *can* pay a synagogue's "normative" price *and want to affiliate* for reasons of identity or education for their children
3. those who want to affiliate for reasons of education or identity, *can't afford* the synagogue's normative fee and are *willing to negotiate* a reduced price (there are some small number in this category who pay a price they cannot afford because of "pride")
4. those who can afford a synagogue's normative price but *will only join* at a negotiated reduced price because in terms of their values, membership in the synagogue is not worth the normative price
5. those who can afford *more* than the synagogue's "normative" price and are willing to pay a premium if asked or pressured

This description of the synagogue market is useful for understanding administrative problems around dues determination and collection that affect all synagogues. It can also help us focus on a major problem that confronts the entire Jewish community—how to bring more of those in Category 1 into active affiliation with synagogues.

These administrative issues affect Categories 2–5:

- Those in Category 2 who commit themselves to a normative fee require a dues-collection procedure that is orderly and rational. Dues must be established and confirmed, bills sent on schedule, and arrears followed up systematically and persistently.
- Those in Category 3—who want to affiliate but cannot afford the normative price—must see a clearly articulated system for dues negotiations: negotiating must be handled confidentially and consistently and be conceived of as fair and related to financial capacity. Once dues are negotiated and confirmed, their payment must be pursued systematically and persistently. The critical questions for this category are who does the negotiation on behalf of the synagogue and by what criteria are reductions made.
- There is no easy answer to dealing with those in Category 4, those who have an ability to pay but will only affiliate at a reduced or manipulated fee. Members in this category corrupt every existing membership plan. They are known to the leadership of the congregation and eventually to many others. They choose to pay what membership is worth to them without regard to their capacity to pay. Because the Jewish community wants and needs their synagogue affiliation, it is betrayed by the unwillingness of people in this category to pay their “fair share.” The issues with regard to this category are matters of policy, rather than of administration. Once a policy decision has been made, whatever dues

are fixed must be pursued systematically and persistently.

- Category 5—those who will pay a premium if asked—raises issues of policy. How shall such premium payers be identified? Who should approach them if anyone, for an “over and above” gift? And of course once a premium payment plan is agreed upon, it too must be pursued in a competent administrative manner.

The determination and collection of dues define not only the financial well-being of the congregation but also the quality of a Jewish community's life. It is a central area of concern in each of these four synagogues, and in each there is experimentation. One synagogue has established a role for the rabbi in adjusting fees for those in arrears. One synagogue has placed its administrator at the center of its dues negotiation system. This same synagogue is embarking on an experimental program in which new members, who receive sizeable reductions in fees, are expected to volunteer their services in the performance of synagogue tasks. The leadership of this congregation seems well aware of the risks and the possibilities of this approach.

If dues negotiation is a generic and essentially unsolved problem, there seems room for a bit of optimism on dues collection. Skilled administrators seem able to develop computer-generated billing programs that are likely to bring increasing order to collections. However, these computerized systems will not solve the problem of arrears. In this regard one congregation has demonstrated that an aggressive program of board member contact with those in arrears can yield impressive results.

SOME GENERAL COMMENTS AND CONCLUSIONS

In my interviews, staff and lay leaders described the administrative structure of their synagogues as “unclear,” and one synagogue president used the term “chaotic.”

Another education director asked me if the administrative "fuzziness" she was experiencing was endemic to all congregations. The answer, based on my fieldwork, is "not necessarily." Repeatedly, I was told of old administrative practices giving way to new ones, and almost always the changes seemed on the side of clarity and rationality. Things are not of a single piece, administratively, in these four congregations, and the differences are instructive and exciting.

Each of the synagogues observed was heavily dependent upon the involvement of lay leadership in the management of the congregation. Efforts to professionalize and rationalize the management of the synagogue must be careful not to marginalize the role of lay leadership. As one rabbi wisely observed in the course of an interview, "It is not my synagogue—it belongs to the congregation."

There is an inexorable movement toward establishing the rabbi as the dominant professional in areas both sacred and profane. Concurrent with that observation, I have *not* met rabbis in my fieldwork who see their forte as administration. Rabbinic training clearly needs strengthening in this area. Yet, even if rabbinic training includes more concern for administration, I see a continued movement toward the employment of trained synagogue administrators. Given the likelihood of such trends, an administrative practice will need to be developed that recognizes the primacy of the rabbi as administrative leader, and the management role of the administrator *within* that person's responsibility to the rabbi.

Lay leadership will of course have a pivotal role in structuring a synagogue's administrative relationships. They will need consultation help from the field staffs of the various synagogue movements in the development of a suitable administrative structure. And lay leadership will need help from rabbis and administrators who have clarity about the roles they expect to play and how they will deal with each other. This article and the fieldwork on which it is

based find strength in the emerging role of the rabbi as the leader in two domains—spiritual and administrative. But, depending upon the size of the congregation, the proclivity of the rabbi, and the desires of lay leadership, there are likely to be varieties of administrative practice in the field. Whatever these varieties, I see the need for lay leadership to have direct access to the administrator without compromising or undermining the overall leadership of the rabbi.

Synagogues have long stopped being "mom and pop" operations. The largest congregation in this study operates on an annual budget in excess of \$1,000,000. Synagogues that seek foundation and federation funds will need to open their books for closer inspection. Conceptualizing the rabbi as CEO and hiring a person carrying the title of administrator are likely to be important steps toward effective management. The rabbi must be able to exercise leadership over "profane" as well as sacred issues, and the administrator must be more than a retitled office manager. And all of those involved, lay and professional, must be willing to examine their practices in the context of accepted standards of sound administration. Whatever the practices for budgeting and fund raising followed in a particular congregation, good administration would seem to require that these practices be open and equitable.

There is another aspect of this focus on synagogue administrative structure that portends good and important things for many synagogues in their changing relationships with federations. As federations and all of American Jewry wrestle with whether and how we can sustain ourselves as a vigorous community, the federation-synagogue relationship must be deepened. New communal resources will be given to synagogues, and there will be more power sharing around the community decision table. How this happens and the pace at which it happens may depend upon whether synagogues are perceived as competent organizations under competent leadership.