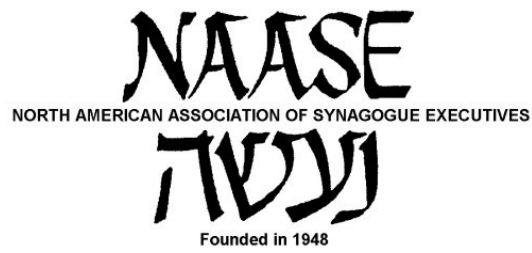


# the 2013 NAASE strategic plan

*Approved by the NAASE Board of Governors  
at its meeting on Monday, November 11, 2013.*

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# NAASE STRATEGIC PLAN

FINAL REVISED VERSION

November, 2013

## ACKNOWLEDGMENTS

When we were approached by our then President of NAASE, Marcia Newfeld, FSA, to Co-chair the Strategic Planning Process, we were truly excited about the possibilities of helping to set the future vision for our organization and planning for ultimately what that might look like. We may, as chairs have been coordinating the process, but it was the information gathered at a Board of Governors meeting at the Pearlstone Center, outside Baltimore, MD, the survey to the members of NAASE, information gathered at our 2013 Conference in Baltimore, MD, and numerous committees, each with a different mission and piece of the puzzle that did the “heavy lifting.” The involvement of numerous committees contributed greatly to the overall effort. These committees were history, survey and analysis, internal operations (looking at ourselves), leadership, programs & services, individual members, external operations (researching and speaking with other similar organizations from whom we could learn), mission, vision and core value committee and drafting and editing. As with any major project, these committees and the people who worked on them are what contribute to producing the final product. We are all most proud of their efforts.

Our heartfelt appreciation goes out to the following chairs and their committee members:

Judy Beck of Judy Beck and Associates, as our professional consultant and “nudge,” who kept us on track.

Harvey Gold, FSA, who chaired the history committee. Who else but Harvey, our long, long time member who helped create most of the history, 43 years plus, could have accomplished such a task?

Fred Rothstein, Richard Tannenbaum and Bernie Goldblatt, FSA, ATz, Vice President in charge of Programming, for chairing the mission, vision, and core values committee. They also chaired the culminating of the recommendations as well. Richard Tannenbaum also chaired the survey committee.

Mark Block, who helped analyze the survey information, having had prior experience in this area and also chaired the internal operations committee.

Susan Kasper, FSA, who chaired the internal operations committee, as well as being co-chair of the 2013 Conference and chair of the 2014 Conference.

Bob Hill, FSA, Past President, and retired colleague, who took all the collected information and beautifully produced the product you are about to view.

We thank our chairs, their committee members and the leadership of NAASE who had the foresight to take the road less traveled and force the journey at this tenuous time and to Marc M. Neiwirth, FSA, ATz, for his on-going support, editing and insuring its implementation.

Today Rabah, and may we all go from strength to strength,

Steve Hecht and Fred Rothstein,  
Co-chairs, Strategic Planning Process

## INTRODUCTION

Over the past 65 years, NAASE has evolved from an association of fifty individuals working as administrators in Conservative synagogues to some 300 current members. Over the years there have been many major changes. The name of the organization was changed from NASA, the National Association of Synagogue Administrators, to NAASE, the North American Association of Synagogue Executives, more accurately recognizing that its members serve Conservative synagogues in both the United States and Canada, as well as reflecting the changing scope and nature of the profession.

The Jewish community and Jewish organizations look very different today from the 1940s, when NASA was organized. Today the world of organized religious institutions is in flux. Many new strategies have been employed and changes made to Jewish communities to address the need for new options. But although there are now many Jewish choices, a compelling strategy has not yet been found to assure a vibrant, multi-denominational Jewish future. Conservative synagogues in particular are experiencing major challenges to their survival, among them declining membership and shrinking financial resources.

As a result, the position of Executive Director within Conservative congregations may be in jeopardy. Recognizing this possible future, NAASE, whose mission is to serve the professional needs of its members, determined to study the issue and research how to best carry out its mission in today's changed world.

In 2012, President Marcia Newfeld, FSA, our Executive Director, Harry Hauser, and the Board of Governors of NAASE voted to undertake a strategic planning process to ensure that NAASE was supporting the needs of its membership now and in the future. The planning process included the following goals:

- Understand NAASE members by demographics, strengths, opportunities and needs.
- Determine the role NAASE should play in supporting the needs of its members.
- Determine the reasonable expectations/performance standards applicable to NAASE leaders.
- Promote the fact that synagogue management must be a uniquely Jewish profession which uses Jewish principles in problem solving.
- Determine the vital information and training that members need to succeed in their jobs.

Under the leadership of Steven Hecht, Fred Rothstein and their committee (Mark Block, Mel Fishman, Harvey Gold, Bernie Goldblatt FSA, ATz, Susan Goldstein, Bob Hill FSA, Susan Kasper FSA, and Richard Tannenbaum) a year was spent on the following tasks: researching the history of our organization, surveying members, looking at the programs and services of similar professional organizations and reviewing the internal operations of NAASE.

The results of the work will be found on the following pages.

## NAASE HISTORY

The fifteen-year period after the end of World War II was one of rapid change in American life, characterized by wide access to home ownership, a huge expansion into suburban living and, for Jews, a major increase in affiliation rates and the establishment of many new synagogues. The Conservative Movement played a major role in this new shaping of American Jewish life.

It was also a period of organization and professional definition for the non-rabbinic senior staff who served the growing synagogue world. While rabbis had a professional association (the Rabbinical Assembly) since 1901, the others had not. But in 1947 the cantors created the Cantors Assembly, in 1948 the initial meeting of NASA was held, and in 1951 the Jewish Educators Assembly was formed.

That first meeting in 1948 of the National Association of Synagogue Administrators (NASA, changed in 1993 to NAASE, see below) was held at JTS in New York with six executive directors present. It established NASA to bring synagogue administrators together as a professional and educational organization, and to identify and develop synagogue management as a professional field. [NOTE: the name given to the position varies from congregation to congregation. In most cases it is now “Executive Director.” In some it is “Administrator,” in others it can be “Director of Administration” or another variant. From NASA/NAASE’s point of view, the key factor is whether the applicant for membership actually has executive responsibilities and decision-making authority, as opposed to being an office manager.]

Over the next decade the organization, paralleling the Movement, grew substantially. In 1952, Dr. Simon Greenberg, Executive Director of the United Synagogue, wrote in the first issue of *The NASA Journal*, “The office of the Synagogue Administrator is only now coming into being,” and encouraged the efforts of NASA to develop this new field. NASA had scores of members by 1958. Many meetings were held between leaders of NASA and those of the United Synagogue, the Rabbinical Assembly, the Educators Assembly, the Cantors Assembly, the Women’s League, and the Federation of Jewish Men’s Clubs to recognize separate identities and yet unity of purpose among synagogue lay leaders and the new professional associations. For NASA members, the process of defining the field as a profession meant laying claim to competence in a widening circle of professional responsibilities, and then adapting the best practices of business and the new capabilities of technology to the unique environment of a Conservative synagogue.

In the late 1950s and early 1960s efforts at professionalizing were energetic. NASA sought to systematize the hiring of executive directors or administrators by establishing a placement office in collaboration with the United Synagogue. Further development of professional status was achieved when administrators were made eligible to participate in the pension and retirement program (now known as the Joint Retirement Board of Conservative Judaism) already used by the rabbis and cantors.

NASA leaders were also interested from the beginning in creating an educational program and a certification system to help solidify the new profession. They had many conversations in the early 60s with leaders at JTS, the premier educational institution of the Conservative Movement, urging them to establish a program of study at JTS in synagogue administration to include both business management and Jewish study, but their advocacy was unsuccessful. The Graduate School of New York University, the next institution approached, did agree to offer such a curriculum, but it did not attract sufficient interest at the

time. A system for training or credentialing in which NASA would partner with an educational institution turned out to be elusive.

But in 1967 NASA did establish its own credentialing program leading to issuance of a statement of qualification as a Fellow in Synagogue Administration. This program is still in operation today. It is internally administered. To qualify as a Fellow, an executive director must be in the field a minimum number of years, participate in specific ways in the organization and its offerings, and complete a certain number of papers or examinations in management and Judaic areas. The program is a self-study program with mentoring, and is built on the premise that professionals will want to both improve their skills and confirm their competence with their colleagues. Major revisions of the FSA program in 1974 and in later years have all been aimed at updating and improving this instrument created to strengthen the image, status, and effectiveness of the synagogue executive.

In the 1970s NASA formalized its interest in data-gathering and research. A commission was formed with the stated purpose of “combining the knowledge, experience, and skill of our members to provide solutions, procedures, and methodology to specific day-to-day problems.” One of its first efforts was to gather data on the *havurah* movement of the 60s and its effect on synagogue communities. A second early effort focused on a wages and benefits survey of members, a topic regularly revisited ever since. In later years regular surveys have also collected data on evolving job responsibilities and relations with lay leaders and with other synagogue professionals.

To improve the ability of administrators and executive directors to be resources to each other, NASA leaders in the 1970s created NASA “regions” that paralleled the geographical regions of the United Synagogue, and encouraged members in each region to try to find ways to meet regularly between annual conferences of the Association. Outside that denominational “region” structure, administrators of Conservative and Reform synagogues on the local level often had (and have) strong relationships (the policy may be different, but the work is the same). Cross-denominational local meetings also became common, and in 1976 NASA and NATA (the National Association of Temple Administrators, our parallel association in the Reform Movement) began the custom of exchanging presidential visits at each other’s annual conferences at the national level.

In the early 1980s NASA established a program to benefit the Movement as a whole, not just the congregations served by NASA members, and in the process to increase NASA’s visibility and role within the Movement. In this program NASA members offered to assist smaller congregations without an administrator or executive director in analyzing or addressing one or more management issues in their congregational life, and suggest solutions for the issue. It was not intended as major long-term congregational introspection, but as a professional consultation on a specific issue in the absence of a sitting administrator. This program, which became the PALS program (Program of Assistance by Liaisons to Synagogues), has helped many small congregations over the years and remains a NAASE offering in modified form today. [A version of this program was occasionally available for many years at biennial conventions of the United Synagogue. Lay leaders could sign up for a one-hour consultation with a NASA (NAASE) member, perhaps as the initial step in deciding whether to move to a more in-depth analysis of one or more congregational issues.]

In 1991 NASA finally realized its goal of creating an ongoing educational opportunity within its own control, though not for both areas of knowledge, administrative and Judaic. A NASA committee, working with an enthusiastic advocate at JTS, Rabbi William Lebeau, instituted the Week of Study Program, in which NASA members had an opportunity to study for five days each year at the Seminary

with their colleagues and with the Seminary's leading scholars on a topic of importance in Jewish community life. This program is significantly subsidized by NAASE to this very day in order to make it as affordable as possible for all members to attend. It has been in existence for 23 years now.

In 1993 the Association officially changed its name from NASA, the National Association of Synagogue Administrators, to NAASE, the North American Association of Synagogue Executives. This change reflected two considerations. First, the Association was not just "national" and never had been. It had had both American and Canadian members since its early days. Second, the change from "administrator" to "executive" was reflective of the fact that "administrator" was not felt to convey the extent or complexity of the executive responsibilities which many members had come to have.

In 1996 the leadership of NAASE tried another approach to encouraging education on the administrative side, so key to the ongoing issues of professionalism, mastery of essential knowledge, and job security. The early hope of establishing a single course of study for the new profession of synagogue administration had proven elusive years before, so a proposal was made, and accepted by the NAASE membership at its annual meeting, to amend the by-laws of the association to institute two levels of membership, Senior Member and Regular Member. Senior status was to be achieved and maintained by earning a certain number of Continuing Education Units in administration and finance from any commercial or university entity every few years. The intention was to encourage members to continually be updating or increasing their knowledge in areas vital to success in synagogue management. A system to promote learning on the management side (if not to actually offer it) was thus instituted to match the Week of Study, which was an opportunity for learning on the Judaic side. In practice, however, the CEU system failed to gain traction with members and was reversed out of the by-laws a few years later.

In 1999 the first commission of Amin Tzibur was conferred. This designation of Amin Tzibur is given to those professionals involved in the ministration of synagogues and their members. Conferred by the Jewish Theological Seminary of America, the United Synagogue of Conservative Judaism and NAASE, these individuals are recognized by their synagogues as one of the religious leaders of the synagogue serving in sacerdotal areas of congregational and communal life, including responsibilities such as leading religious services, serving as members of a beit din, teaching, counseling and ministering to the needs of the congregation in matters of life cycle events, religious ceremonies, kashrut supervision and other areas of Jewish living.

The efforts of the Association to induce its members to expand their knowledge base thus settled into the present two-part program. The Annual Conference is promoted as the opportunity for administrative or managerial learning, and the Week of Study is promoted as the opportunity for increasing Torah study. In 2009 a new option was tried for the first time, a three-day management course at American Jewish University in Los Angeles taking advantage of its MBA degree program in non-profit management, but it is not known yet whether there is sufficient interest among NAASE members for NAASE to underwrite this program on an ongoing basis.

Much effort goes into the Annual Conference of the Association, and it is the major opportunity for members to meet, network, learn, socialize, re-energize, and become motivated. Conferences are held in the United States or Canada, and every six years in Israel. They are attended by roughly two-thirds of the sitting executive directors annually.

In the last fifteen years NAASE has developed several other ways to assist its members. Prior to 1997 all the work of the Association was carried out by its members, primarily its officers and governors,

on a volunteer basis. But the growing number of members and the increasing offerings of the Association made it difficult for sitting executive directors to find the time to also do the Association's work properly. In 1997 NAASE hired a former colleague as a part-time administrative assistant. Then in 1999 the decision was made to upgrade that position to an executive director with greatly expanded responsibilities but still on a part-time basis. Having that position has made it possible for NAASE to significantly improve both its operational efficiency and its service to individual members.

In addition, NAASE's listserv, the ExecNet, is an instant communication tool for executive directors for comment, query, and discussion. The Association's website is an attractive public face for the field, while also offering, behind a members-only gate, a directory and an array of useful resources. The ARC (Administrative Resource Center) is an online library of manuals, forms, procedures, policies, documents, and communications contributed by members and used by other members when developing or revising their own. Consultation with NATA, NAASE's Reform Movement counterpart, has resulted in access for members of each association to the resources of the other, and in periodic joint surveys on issues of mutual interest, such as salaries and benefits. A joint Annual Conference was held in 2009 (after a 22-year gap), and more joint conferences are under discussion, as are jointly-developed webinars.

The Association's directory currently lists 310 members including all categories. Of those, 183 are sitting executive directors serving Conservative congregations. The balance are sitting executive directors presently in non-Conservative congregations, affiliate members, Life Members, and Friends of NAASE. In early days the membership was entirely male, as was true of the rabbinate, the cantorate, and many other professions. Now women and men are effectively at parity in their representation in the field.

## **DEMOGRAPHIC PROFILE OF SURVEY RESPONDENTS**

The committee conducted an extensive survey of the 183 NAASE members presently serving in Conservative congregations, and received 132 responses, for a participation rate of 72%. Gender breakdown was 67 male and 63 female (2 did not answer).

Age breakdown of respondents:

< 30.....	0
31-40.....	7 ( 5.3%)
41-50.....	16 (12.1%)
51-60.....	55 (41.7%)
61-70.....	53 (40.2%)
71>.....	1

Size of congregation in which respondents are employed:

< 250.....	3 (2%)
251-400.....	31 (23.5%)
401-600.....	46 (35%)
601-999.....	33 (25%)
1000 >.....	19 (14.5%)

Number of years respondents have been in the field of synagogue administration:



0-5.....	41
6-10.....	28
11-15.....	25
16-20.....	12
21-25.....	13
26-30.....	7
31-35.....	3
36-40.....	1
41 > .....	1

Number of years respondents have been in their present position:

0 -1.....	15
1 -5.....	40
6 -10.....	32
11-15.....	23
16-20.....	5
21-25.....	9
26-30.....	2
31-35.....	2
35-40.....	0
41 >.....	1

Respondents came to the field of synagogue administration from varied backgrounds. Twenty-nine respondents worked in other Jewish communal organizations, the largest number (11) in Jewish Community Centers. Fifteen respondents worked in synagogues in various capacities (two had been the president of their congregation). Fifteen respondents worked as managers in either the for-profit or not-for-profit sectors. The remainder, 73 or 55%, came from business, banking, education, accounting, law, or other fields.

### **Observations on the Demographics**

Slightly more than half of the respondents (52%) have been in the field less than ten years. Over 30% of the respondents have been in the field less than five years. The turnover rate in the field is extremely high and a continuing cause for concern.

NAASE is an older work force, perhaps inherently so as a second-career field: 81% of the respondents are age 50 or above.

## KEY RESULTS FROM THE SURVEY AND INTERVIEWS

The majority of respondents, 78.7%, were either very satisfied or somewhat satisfied with NAASE – the Association is doing many things well. But there is clear room for improved services and improved performance to meet new needs.

There is a significant degree of dissonance among respondents regarding the work they are doing versus the work they feel they should be doing. Most respondents report spending most of their time doing administrative or managerial tasks. But many of them feel that they should be focusing their time more on long-range financial planning, membership growth and retention, marketing and communications, and synagogue leadership development. In some cases the dissonance arises when the respondent feels s/he should be spending his/her time on higher-level tasks, but the lay leadership does not. In other cases the dissonance arises when the respondent and the lay leadership both feel that s/he should be spending more time on higher-level tasks, but s/he does not feel skilled enough or knowledgeable enough to act in those areas.

Self-Image varies. Some respondents see themselves as basic administrators. Some see themselves as leaders or change agents.

Many respondents do not feel confident of their knowledge or skill in basic administration, financial planning, membership growth and retention, marketing and communications, and synagogue leadership development.

Respondents felt the most important services provided by NAASE to them were the ExecNet, informal networking, the conferences, and the ARC. The respondents newest to the field were the least familiar with the array of other NAASE services.

The majority of respondents do not view FSA certification, ATz commission, or the Week of Study program as having a “practical benefit,” and so are unlikely to pursue them.

Those not participating in NAASE’s major educational opportunity, the Annual Conference, reported that they did not do so because it “took too much time away from the job” (19.4%), or they had no support to do so from their lay leadership (19.4%), or it was “too expensive” (16.7%).

Some respondents feel that NAASE leadership is not as communicative or responsive as it should be. Recommendations to remediate that perception are included in this strategic plan.

## **CRITICAL ISSUES IDENTIFIED IN THE SURVEY, INTERVIEWS, AND RESEARCH**

- Increasing the Association's leadership pool
- Increasing the total membership to its maximum potential
- Increasing the attendance at the Annual Conference
- Expanding NAASE's educational offerings for skills and knowledge acquisition
- Strengthening regional groups
- Making the placement process more effective
- Decreasing the turnover rate in the field
- Reviewing the FSA program
- Making Association leaders more accessible to members
- Improving marketing materials
- Raising NAASE's profile within the Conservative Movement and beyond
- Increasing collaboration with NATA
- Implementing the Strategic Plan

# PROPOSED NEW STATEMENT OF MISSION, VISION, AND VALUES

## NAASE Mission

The **North American Association of Synagogue Executives (NAASE)** is a Jewish membership organization serving the professional needs of Executive Directors of Conservative Synagogues.

## NAASE Vision

NAASE serves as the central resource for professional development, job placement, information-sharing, and peer support for Executive Directors serving in Conservative congregations, and to raise the profile of the Association in the Conservative Movement and the Jewish Community by:

- Bringing together synagogue executives to further the development of their professional skills, thus enabling each member to serve his or her congregation as effectively as possible.
- Providing the necessary resources to achieve success as an executive director.
- Raising the level of awareness among clergy and lay leadership about the value and expertise a qualified executive director brings to the synagogue.
- Fostering an appreciation of Jewish values, Klal Yisrael and Conservative Judaism.
- Developing positive and collaborative relationships with other organizations that foster our mission.

## **NAASE Core Values**

### **Community / Kehilla**

We value a caring and welcoming NAASE community in which we share our knowledge, experience, and collective wisdom. We value spending time with our colleagues in person, at conferences, at opportunities for study, and online in our listserv, webinars and administrative resource center.

### **Education / Limud**

We value professional education as a career-long endeavor to become more effective and professional Executive Directors thereby ensuring the highest level of service to our congregations. We also value continuing Jewish education as it enhances our understanding of the communities we serve.

### **Ethical Standards / Musar**

We value a community whose members behave in a fair and ethical manner, as defined by the Torah and our sages, and in keeping with our religious traditions.

### **Love of Israel / Ahavat Yisrael**

We value our ties with the land of Israel and its people. We value the importance of the State of Israel to the continued existence of the Jewish people, and the opportunity to actively promote Israel in our congregations and communities.

### **Respect / Derech Eretz**

We value and respect every member of NAASE both personally and professionally. We expect this respect to guide our decisions, attitudes and behavior at all times. We value treating all people with kindness and respect.

## STRATEGIC PLAN COMMITTEE RECOMMENDATIONS

Key: (S): 6 Months, (M): 18-24 Months, (L): 24-36 Months

### A. GOAL: IMPROVE GOVERNANCE AND SERVICE DELIVERY WITHIN NAASE

1. **Objective: Strengthen Leadership Pool -- Widen Eligibility for Leadership in NAASE:**
  - a. Make executive directors working at Conservative congregations (regardless of USCJ affiliation) eligible for Regular membership (and therefore for elective office). (S)
  - b. Consider revising the present requirement of a bachelor's degree for Regular membership (and therefore for elective office). (S)
  - c. Consider revising the requirements for service as an Officer. (S)
2. **Objective: Strengthen Regional Groups** (NOTE: Since regional groups are commonly multi-denominational, this objective is closely related to Objective 5 under Goal G.)
  - a. Assign responsibility at the Board level for outreach to the regional groups. (M)
  - b. Organize new regional groups where they would be useful and do not now exist. (M)
  - c. Hold Board meetings periodically in conjunction with a regional group meeting. (M)
  - d. Increase resources available to regional groups. (M)
3. **Objective: Maximize Connection between Leaders and Members**
  - a. In order for NAASE to meet the changing needs of its members, conduct regular surveys of members to reinforce the connection of the leadership to the membership. (L)
  - b. Use Constant Contact to communicate with members on a monthly basis. (M)
  - c. Strongly encourage the President and Vice-Presidents to send out quarterly emails to members about matters in their portfolios. (M)
  - d. Strongly encourage the President to offer semiannual "State of the Association" webinars. (M)
  - e. Require Board members to be responsible for regular personal communication with up to three new members, both to increase interaction between Board and members, and to collect feedback on NAASE programs. (M)

### B. GOAL: INCREASE MEMBERSHIP

1. **Objective: Develop and implement a plan to engage and enroll as members all executive directors who meet the requirements for membership in any of the membership categories of the association.** Rationale: There are executive directors in North America eligible for membership who are not members. Making common cause

with the greatest possible number of colleagues increases everyone's access to shared knowledge, benefits congregational life, and augments the Association.

2. Examine changing demographics and the long term effect on NAASE, i.e. congregations are hiring non-Jewish Executive Directors. We recommend an immediate study of this issue. (S)
- C. **GOAL: DECREASE TURNOVER OF EXECUTIVE DIRECTORS.** Rationale: High turnover of executive directors in their jobs is not optimal for the individual, the synagogue, or the field. Making sure that congregations and individuals both understand what the job is, make the best match and agree to appropriate expectations is vital for reducing turnover.
1. **Objective: Make Placement Process More Effective**
    - a. Revise a "Guide for Congregations Going Into Placement for a New Executive Director," and post it on the public side of our website. (M)
    - b. Work with congregational search committees in developing job descriptions, skill requirements, and compensation appropriate for the position and the congregation, in order to help insure that the right person is hired for the position. Stress the clear return on investment of congregational funds in the professional development of their executive director. (M)
- D. **GOAL: OFFER MAXIMUM RESOURCES TO MEMBERS FOR SKILLS DEVELOPMENT.** Rationale: Many members feel insufficiently knowledgeable in important areas of their jobs. NAASE should increase its role as a vital source of learning opportunities, as well as be a source of information about other venues for learning.
1. **Objective: Develop and offer new presentations and materials for members, targeted to the areas in which the survey reveals they feel weakest – finance, fundraising, financial development, recruitment and retention, marketing and communications, leadership development, human resources, technology.** (M)
  2. **Objective: Improve the existing methods by which educational material and knowledge topics are made available to members**
    - a. Review the *NAASE Journal* with an eye towards quality content and timeliness. (S)
    - b. Evaluate and redesign our website, our emails, and our marketing pieces. (L)
  3. **Objective: Add new methods by which educational materials and knowledge topics are made available to members**
    - a. Create "AskNAASE.com," a service that offers how-to answers at a click, as a supplement to the ExecNet. (L)
    - b. Offer a blog on issues and solutions. (L)
    - c. Offer chat rooms based on topics, such as capital campaigns or facility operations. (L)

- d. Offer quarterly webinars by experts on different topics, such as changing technology or using social media. (S)
- e. Explore taking “NAASE University” on the road, offering nuts-and-bolts presentations regionally. (L)
- f. Offer a monthly e-letter on a specific topic of interest in the field. (M)
- g. Create a quality Standard Operating Procedure Manual for new executive directors. (M)

E. **GOAL: ENCOURAGE MEMBERS TO USE NAASE RESOURCES AND OUTSIDE RESOURCES TO INCREASE THEIR COMPETENCE AND STAY CURRENT ON BEST PRACTICES.** Rationale: NAASE members, like professionals in other fields, need to make learning new approaches and best practices in their profession a regular commitment. For executive directors, that means regularly upgrading one’s skills in both management and religious community life for maximum job success.

1. **Objective: Increase participation at Annual Conference**

- a. Offer different tracks or sessions based on congregational size or level of experience in the field. (M)
- b. Offer courses with credit toward FSA before, during, or after the Conference. (M)
- c. Shorten the length of the Conference, ending on Wednesday afternoon. (M)
- d. Continue to utilize high-level experts as speakers. (L)
- e. Increase the use of break-out groups, in which brainstorming is productive. (S)
- f. Establish a set of criteria for the selection of location of the annual Conference. (M)
- g. Use technology to make Conference highlights available to those unable to attend. (M)
- h. Continue to offer cost discounts to first-time attendees. (M)
- i. Designate surpluses from any Conference for use in future cost discounts, particularly when the Conference is in Israel. (L)

2. **Objective: Review the overall FSA process for purpose, content, requirements, and quality.** Rationale: Periodic review is important for all organizational processes and certification programs in order to keep the certification relevant. (M)

3. **Objective: Actively promote seeking the FSA to both successful experienced administrators and to those rising in the field.** Rationale: FSA certification is a public indication of knowledge and experience in the field of synagogue administration. FSA certification honors the holder, its synagogue and honors the profession. (M)

4. **Objective: Encourage members to use outside resources (college courses, for-profit company courses, non-profit webinars) as well as NAASE offerings for skills development.** Rationale: NAASE alone cannot be expected to erase major skill deficits.



Members have to be encouraged to make use of local options for extended courses in areas in which they feel weak.

- a. Develop and distribute a list of examples of resources an administrator might pursue in finance, administration, personnel management, time management, fundraising & development, information technology, facility management, or other areas. (M)

**F. GOAL: INCREASE NAASE VISIBILITY, REPUTATION, AND ROLE IN THE MOVEMENT AND BEYOND.**

Rationale: As the professionals responsible for the operational success of the synagogue, executive directors have important contributions to make in the discussions about the Jewish future.

1. **Objective: Strengthen the presence of NAASE in United Synagogue governance and programs**

- a. Seek roles for NAASE presenters at Biennials and Sulam programs, and in USCJ webinars. (M)
- b. Promote role as USCJ partner in information collection and dissemination. (S)
- c. When appropriate take a visible booth at USCJ biennials and distribute quality marketing materials about NAASE. (M)
- d. Cultivate direct personal relationships between NAASE leaders and leaders of USCJ and the other arms of the Movement. (S)

2. **Objective: Strengthen the awareness of NAASE among Conservative kehilla leaders**

- a. Create and distribute quality educational materials to lay leaders and clergy about NAASE and the benefits of supporting the ongoing professional development of their executive directors. (M)
- b. Send informational copies of registration materials for the annual Conference and other programs to congregational presidents and rabbis. (M)
- c. Provide regular article in CJ Magazine. (L)

3. **Objective: Market NAASE to smaller segments of the Jewish community, i.e.; Reconstructionist and Renewal congregations as a resource for their executive directors.** (L)

**G. GOAL: INCREASE COOPERATION WITH NATA FOR MUTUAL BENEFIT.**

Rationale: Synagogues are under stress across all denominations, our work as executive directors is similar across all denominations, and executive directors commonly move among Conservative, Reform, and Reconstructionist congregations over the course of their careers. Cooperation is clearly in the best interests of everyone.

1. **Objective: Jointly develop webinars and e-reports, potentially using video conferencing.** (S)

2. **Objective: Increase coordination and collaboration on placement services.** (L)

3. **Objective:** Periodically schedule joint conferences with NATA. Arrangements are to be an equal partnership agreement. Rationale: The issues are the same. Economies of scale encourage better presentations and wider networking. (L)
4. **Objective:** Consider reciprocal acceptance of certification. (S)
5. **Objective:** Nurture regional groups. Rationale: Regional groups are very commonly multi-denominational. (L)

**H. GOAL: IMPLEMENT THE STRATEGIC PLAN SMOOTHLY AND EXPEDITIOUSLY.**

1. **Objective:** Appoint a Strategic Plan Implementation Committee, with priorities and completion dates. (S)
2. **Objective:** Designate a member of the Executive Committee with oversight authority. (S)
3. **Objective:** Explore NAASE's staffing requirements to include more programmatic responsibilities if full implementation of the plan requires it. (L)

**ADDENDA:**

**Internal Operations Report**

**External Operations Report**

**Separate Attachment:-**

**(1) Slide Presentation to Membership at the 2013 Conference.**

**(2) Survey –Raw Data**

## Internal Operations Report

This committee will assess information re: NAASE vis a vis financial management, personnel management, communications/marketing and governance structures. A report on your findings and recommendations will be written for inclusion in the plan.

### TASKS:

Solicit information from staff/ board and members in the following areas:

How effective is NAASE leadership in leading the organization?

How well is NAASE managed financially and make an assessment as to the financial health of NAASE going forward (are there any red flags)?

Is the current governance structure effective?

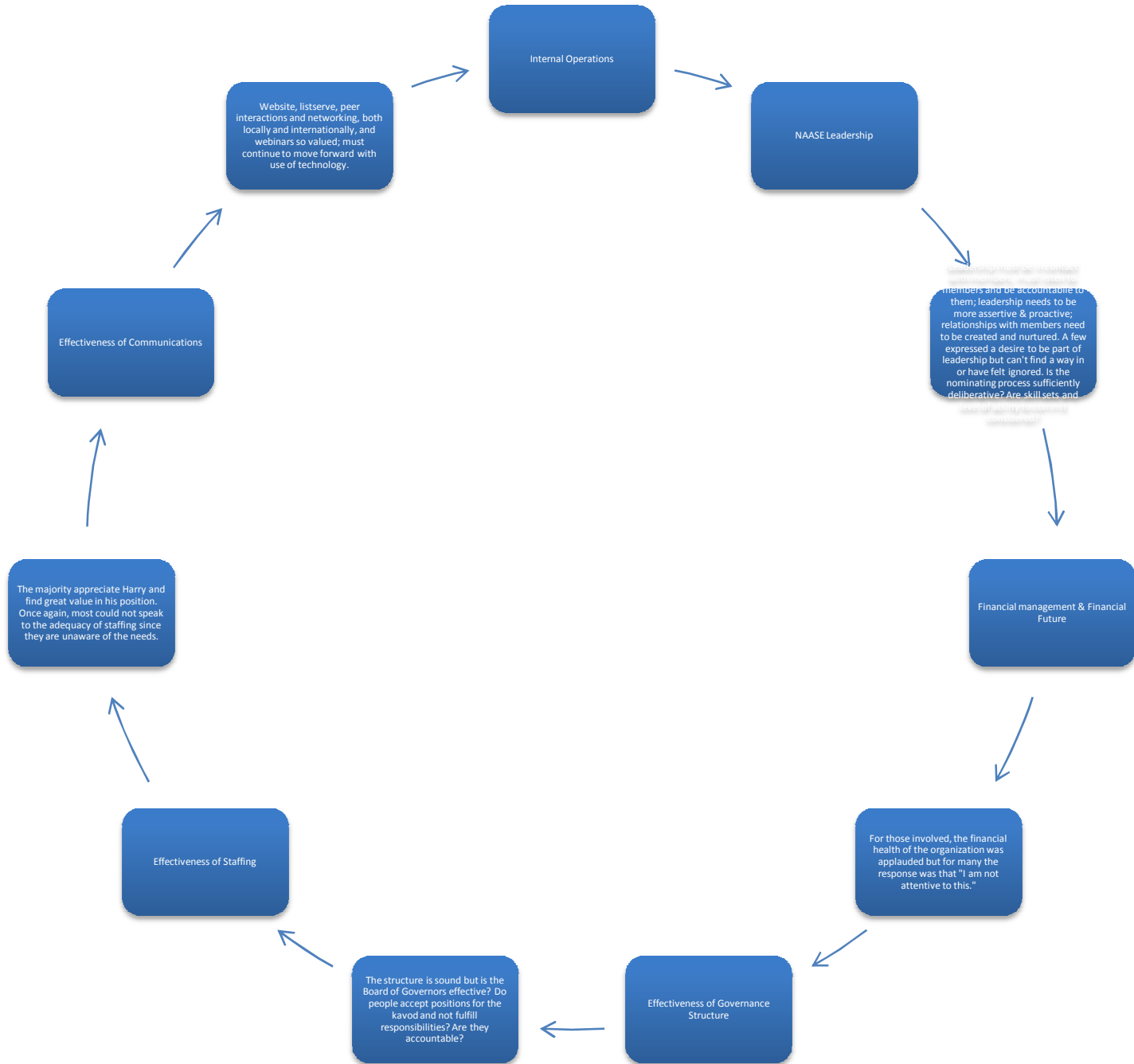
Is staffing adequate now and in the future...Should there be an increase in staff time...staff??

Are communications internal and external effective?

Sub-Committee: this sub-committee consists of Susan Kasper and Susan Goldstein

Tools: the committee used data collected in the recent survey, and face-to-face as well as phone conversations with colleagues. All conversations (approximately 20) were meant to engage for the sake of ascertaining opinions as well as offering kavod. More than 20 calls were placed; some of those who were not reached directly did not have the time or inclination to return the calls (A statement unto itself). The committee reached out to NAASE leadership, active NAASE members, inactive NAASE members and lay leadership.

Responses:



The above diagram shows the obvious interdependence of all of the aspects of NAASE's internal operations while indicating the important consistent kernels of information gathered. A clear thread, an obvious key point, is that those who are involved in or aware of NAASE had opinions of varying complexities; the uninformed and uninformed expressed an inability to reflect on the topics at hand. Additionally when we discussed the lack of NAASE knowledge/involvement, the answers were not new

to us, “I don’t have the time, I don’t have the budget, I don’t see the value, my leadership cannot find value”.

Conclusions:

Communicate and Engage:

The organization must do a better job of marketing itself-to members, nonmember executive directors and lay leaders. The basic step is to further open lines of communication.

- Put the buddy system, we have been discussing, in place. Give each of the Board members a number of members to reach out to through the course of the year as part of their portfolio.
- Continue the membership outreach, once again the most powerful tool is a conversation.
- Use the conference ambassadors committee (a newly instituted subcommittee of the 2014 Toronto Conference Committee) to reach out to members who have not attended conference to share the value and offer a discount for attendance.
- Engage the local groups to market the organization’s value. Become a resource for congregations looking for Executive Directors, beyond their registering the position with us. Send out a mentor (use local groups) to meet with their search committees as they initiate their process.

Educate and Program:

NAASE members and their lay leaders are in need of educational programming. We must target both groups.

- Members need to know that we are their support system; we must educate them on the tools they need on a daily basis, specifically, HR, healthcare, marketing, finance and development, leadership development and programming.
- Use the local groups as venues for education, send in “our experts” and mentors.
- Increase the number of webinars. Provide a live feed of conference sessions and create a one-time conference registration that enables attendance via that live feed. Or videotape the conference sessions and put them on our website to enable viewing by both our members and their leadership.
- Provide, (above and beyond the buddy system we currently have in place for new members), an actual new to the field Executive Director nuts and bolts course, available twice a year.
- Educate congregational leadership to recognize the value of our profession: to conceptualize and understand the role of and the need for an Executive Director; as well as the value of NAASE to the person in that role.
- Targeted materials should be developed. Think of the value of specifically extending an invitation to conferences to Congregational Presidents; perhaps even creating a panel discussion with some of them. Once exposed to the wealth of programming we do and information we provide, we believe the value will be clear and the cost of membership and conference palatable.

## External Operations Report

The job of this committee is to check out the best practices of other professional organizations... and also to indicate how these groups respond programmatically to key trends in the community at large and the synagogue/Jewish community in particular.

- 1- Identify synagogue and Jewish communal related demographic trend information
- 2- Identify key themes/trends in congregational life and in the expectations for executive directors
- 3- Reach out to NATA, the OU Executive Directors network, Jewish Communal Service Association, Alban and/or any church or Christian professional groups...you even might want to reach out to the Rabbinical Assembly and Cantors Assembly.
  - a- Find out/list the services, programs they offer their members.
  - b- What do they excel at?
  - c- What does NAASE do better?
  - d- How do they use new technology? Are they successful?
  - e- Are there opportunities/advantages in collaborating on a program with any of these groups?

### *National Association of Temple Administrators (NATA)*

#### **Conferences**

The National Association for Temple Administration (NATA) holds an Annual Conference to bring together administrators and nationally recognized presenters in the areas of Judaic knowledge, management, finance, human resources and leadership.

#### **FTA Program**

Fellow in Temple Administration Certification is a certification program for those administrators who demonstrate through a rigorous content based program a commitment to the highest standards of professional skills and professional growth in our field.

#### **NATA Institute**

NATA invites persons interested in furthering their career as professional Temple Executive Directors/Administrators to attend the NATA Institute for Professional Development. This is both an educational and bonding experience. Institute Courses taught include Management and Judaic subjects.

#### **Find a Job**

As a service to colleagues NATA Placement provides a database of the latest job listings for temple administrators and executive directors throughout North America. NATA Members and Registered Placement Only Members may access the placement listings.

## **Jewish Federations of North America**

### **Development Professionals Institute**

A unique opportunity for senior development professionals from all streams of resource development to network with colleagues, discuss emerging trends and strategies, and build best practices for themselves and their Federation.

### **Federation Executive Recruitment and Education Program**

FEREP offers graduate school scholarships for \$10,000 or \$20,000 to particular programs at some of the country's most prestigious universities in exchange for a two to three year commitment to work in the Jewish federation system.

## **Jewish Community Centers of North America (JCCA)**

### **Community Consultation**

Community consultants have decades of experience as JCC executives. They facilitate excellence in JCC leadership and management by developing assessment tools, creating training opportunities, identifying indicators of success or failure, and devising opportunities of sharing and learning among lay and professional leadership. Through the Mandel Center for Excellence in Leadership and Management, JCCA has expanded its consultation services in business management, financial resource development, and marketing, to match those in health and wellness, early childhood services, and arts and culture. Each affiliated JCC has a community consultant.

### **Professional Staff Development**

JCC professional staff are offered a myriad of professional-development opportunities, ranging from the large JCCs of North America Professional Staff Conference to graduate scholarships, webinars, and onsite one and two-day conferences. Executive directors meet at the annual Executives Seminar to talk about what's going on in the JCC Movement and learn about the latest in nonprofit management techniques. JCCA has a program that offers support and guidance for first-time executives, which includes visits and mentoring, and has established a task force to study how to recruit and retain the finest professionals to lead JCCs in the future.

### **Executive Recruitment & Search**

A JCC is in greatest need when there is a change in executive leadership. JCC Association has almost thirty years of experience helping JCCs through this difficult transition and providing executive search services. JCCA individualizes each search by determining with the JCC the unique qualifications and skills needed. It then matches candidates to these criteria. JCCA also has a cadre of experienced JCC executives who can provide interim leadership, should that need arise.

### **JCC Benchmarking**

JCC Benchmarking helps JCCs improve their services and operations by tracking measurable indicators of excellence in financial sustainability, Jewish impact, member/user engagement, staff engagement and program performance. Benchmarking helps JCCs capitalize on their strengths and serves as an "early warning system" to detect problems before they become crises. It also leads to development of exemplars: best practices in programs, policies and procedures, which can be replicated by other JCCs.

Our Benchmarking services provide the JCC with three types of information:

The JCC field at large

Site specific individual JCC compared to other JCCs of a similar (budget) size

Site specific JCC compared to itself year-over-year

More than 45 percent of all JCCs across North America have participated in the Benchmarking process.

### **JCC Association Graduate Education Scholarship Program**

The JCC Association Graduate Education Scholarship Program has been in existence for over 50 years. There are hundreds of scholarship recipients working at every level of the JCC Movement. The JCC Association Graduate Education Scholarship Program is designed to help current and future JCC professionals deepen and enhance their professional knowledge in order to make them effective and successful.

### **JCCs of North America Professional Conference**

Annual four-day conference in which attendees take part in their choice of [14 job tracks](#) and ability to pick from [44 choose-your-own seminars](#) and workshops. Of the [90 speaker/trainers](#), 40 come from outside the JCC field. Learning opportunities include trends in social media, pool safety, creating a welcoming environment, managing volunteers, engaging donors, and many other aspects of JCC work.

### **JCC Association Emerging Young Professionals**

As Jewish communal organizations are confronting the imminent retirement of a generation of professional leaders, the JCCs of North America is responding with a vigorous strategy of inclusion of younger staff. Several groups of new and rising JCC professionals are partnered to interact with seasoned JCC lay and professional leaders. The most important asset JCCs have is a knowledgeable, dedicated staff.

### **Merrin Teen Professional Fellows**

The Merrin Fellowship's mission is to give those working with Jewish teens the skills to better serve this critical sector of the Jewish community, to enhance the profile of those working with teens in their respective organizations, to deepen the Jewish identities of the participants, and to build a stronger professional network of teen service providers. Since 1999, more than eighty professionals have completed this 18-month program and many are now in executive management positions.

### **JTS Helps JCC Professionals Develop Leadership Skills**

The Jewish Experiential Leadership Institute is a 15-month program specifically designed for JCC professionals who want to enhance and develop their leadership skills, particularly deepening their capacity to view management issues through a Jewish lens. Working with the William Davidson Graduate School of Education at the Jewish Theological Seminary in New York City, JCC Association's department of professional development services has designed a series of monthly online workshops and three in-person seminars.



### *Women's League for Conservative Judaism (volunteers)*

Orientation for Sisterhood Presidents in each Region

Orientation of Torah Fund Vice Presidents and Regional Presidents for a three day conference

Distant Workshop online

Leadership Training Institute

Day of Study in Israel

Training of Volunteer Trainers to be instrumental in teaching at regional conferences

### **Conclusions:**

There are numerous professional organizations similar to NAASE. Many of these organizations are volunteer-led along with a small professional staff administering to the needs of the members and volunteers. The offerings to members are similar from one organization to another. Conferences and listservs, printed publications and member lists are popular, as are other resources from which members can glean information. The ability to “talk” with like minded professionals in a variety of settings is an important component of each of the organizations that were reviewed for this report. Professional development is a component of some but not of all organizations. Building continuity in lay leadership is a struggle for some, but it is typically based on the models we see ourselves in our own synagogues. Those who have a penchant to serve and take an active role have the ability and opportunity to do so. There is a high level of personal satisfaction for those who do involve themselves in their respective organization, but often time constraints prevent individuals from devoting as much time as they would like to feel fully satisfied. There is less need for services for those who do not involve themselves in the operation of the organization for which they maintain a professional relationship.

Development of the professional is a key component in each organization reviewed as mentioned earlier. This development, whether through conferences or publications, webinars or other forms of communications appears to receive the greatest amount of dollar resources from the sponsoring organization with the exception of professional staff salaries. Reasonable costs to maintain affiliation and conference costs are important to members in making their decision to join and remain affiliated. NAASE in its strategic planning should continue to provide those services which are used by a majority of members. Participation rates should be monitored and services or programs offered which do not match the wants of the organizations members should be reconsidered.