

**PEARL: Providing Education and Resources for Leadership**

# **System Evaluation in the Rabbi-Congregation Relationship**

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**Jewish Reconstructionist Federation**

***Transformative Judaism for the 21st Century***

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## **Mordecai Kaplan on Systems Theory**

The Future of the American Jew, p. 148

“...the human being is not a self-contained atom, but is the product of the biological, historical and social forces that operate in the group to which he belongs.... What has been said of words in relation to their context is true of human beings in relation to their communities; they are not ‘pebbles in juxtaposition’; they have only a communal existence; the meaning of each interpenetrates the others.”

## A Systems Perspective

The Rabbi-Congregation Relationship: A Vision for the 21st Century  
Report of the Reconstructionist Commission on the Role of the Rabbi

January 2001 / Tevet 5761 (pp. 15-19)

Available from the Reconstructionist Press – <http://www.jrf.org/pub/cat-papers.html>

Reconstructionism has long advocated the importance of being familiar with the social as well as natural sciences and applying their insights to Jewish life. History, psychology and sociology, for example, have had significant influences on the ways in which Reconstructionism approaches the shaping of a post-modern Judaism.

When it comes to the role of the rabbi and the rabbi-congregation relationship, social scientific research and theory helps frame the discussion in innovative ways. In the past few decades an enormous amount of research has become available to organizations and their leaders regarding the nature of their identities, their work and their interaction.

Beginning in the late 1960s and 1970s, “systems theory” emerged in the field of family therapy, anthropology and communications, as well as in the business world. A systems approach looks at the totality of a social organization and the interactions within it. This approach recognizes that the parts interact organically, with the whole being greater than the sum of its parts.

Peter Steinke writes (*Healthy Congregations: A Systems Approach*, Alban Institute, 1996, pp. 3-5):

Systems thinking is basically a way of thinking about life as all of a piece. It is a way of thinking about how the whole is arranged, how its parts interact, and how the relationships between the parts produce something new. A systems approach claims that any person or event stands in relationship to something. You cannot isolate anything and understand it. The parts function as they do because of the presence of the other parts. All parts interface and affect each other. Their behaviors are reciprocal to one another, mutually reinforcing. Thus change in one part produces change in another part, even in the whole. There is a “ripple” throughout the system.

No problem can be seen in isolation. The problem is in the whole, not the part. The system is the locus of the problem. The problem is in the interaction between the parts. The same is true for solutions and corrections. With a systems approach, we “see” the *interactions* that take place, the *information* that is exchanged, and the *influence* that is reciprocally reinforced.

Dr. Nancy Post, an organizational consultant and member of JRF affiliate Mishkan Shalom in Philadelphia, provides these additional insights:

- The life of a system is evident in the interaction of its parts; as with any living organism, it is important to focus on what is dynamic and changing, not only on what is static and stable.
- A system needs to be seen within the larger system of which it is a part; a specific congregation exists within a larger pattern of congregations (for example, the Reconstructionist movement) and is influenced by, as well as having an influence on, the larger system.
- Subsystems within a system (e.g., a congregational board, the education committee, the fund-raising committee, the social action committee) are microcosms of the system as a whole and will often duplicate its patterns.

As applied to synagogue life, a systems approach sees the totality of the congregational system along with the interaction of the component parts, rather than looking only at individual roles or functions. There are significant and promising implications in this approach for understanding the role of the rabbi within a new conception of the synagogue as a system.

The systems approach provides rabbis and congregation leaders with a new approach to understanding their work, their roles, their interaction and their place in the total congregational system. This provides a new vocabulary for a common conversation that can support change.

Systems theory recognizes that what appears to be discrete and individual is in fact interconnected, dynamic and determined by a multiplicity of factors that interact in complex ways. Nothing is static; everything is in process. For Reconstructionists, this may sound familiar: what contemporary organizational theorists call systems theory is similar to what Mordecai Kaplan called the principle of organic reciprocity.

For Kaplan, organic reciprocity – meaning that the whole acts upon the part, and the part in turn acts upon the whole – is not only a way of understanding how social institutions function. It is also the foundation for contemporary Jewish ethics. Kaplan believed that we are obligated to behave ethically because everything we do affects everything else, with the responsibility for the world shared by all. Organicity for Kaplan implies responsibility. There are thus spiritual as well as organizational possibilities in using a systems approach to understand synagogue life (system) and the rabbi-congregation relationship (sub-system).

A systems approach implies new ways of thinking about the rabbi-congregation relationship. At any given moment, for example, specific individuals may be responsible

for exercising leadership, but leadership is an *activity* of the congregational system, rather than only the *job* of one or more persons.

Systems theory broadens the traditional boundaries for roles, so that tasks formerly assigned to specific volunteers, committees and staff members can be redefined. Ensuring that the congregational system accomplishes its tasks, rather than monitoring how people fulfill preconceived roles, becomes a shared responsibility.

For example, a rabbi who excels in adult learning and pastoral counseling may not excel in youth work. Rather than view this as a task assigned to the rabbinic role (and consequently defining the rabbi as deficient notwithstanding her/his excellence in other areas), a congregation can hire a youth director.

An issue like stress is frequently understood in individual terms. A congregational board may legitimately find itself asking the following types of questions: "Why does the rabbi always complain about being overworked?" "Why have we had three different educational directors in three years?" "Why doesn't anyone want to stay on the board?" But rather than location such types of burnout as an issue within a person or one part of the congregation, a systems approach encourages congregations to ask instead, "What in the functioning of our synagogue system creates burnout [which is manifest in the rabbi, or the staff, or the board]?"

Individuals, of course, play a role in and affect a system, as do subsystems of the congregational system. Any individual congregant or congregational subsystem can unbalance the entire system. For example, a decision of the education committee to increase the academic requirements for Bar/Bat Mitzvah will have an impact on the membership committee, the ritual committee and the synagogue board. It will affect, among others, the rabbi, the cantor, the students and parents, the Bar/Bat mitzvah tutors and the president (who is likely to get both irate and supportive phone calls).

Congregations go through various cycles; defining the role of the rabbi in a congregation is not an abstract issue but a concrete one: what is the role of *this* rabbi in *this* congregation at *this* moment in its development? Put differently: where is the congregational system in its developmental cycle, and at what stage is the rabbi entering the system?

For example, newly formed congregations may not want to handle difficult policy issues which can become divisive before the secondary stages of stability and consolidation are reached. Veteran congregations with precedent and policy may welcome an active engagement with substantive issues that help to chart new directions. The rabbi and leaders play a primary role in the congregational system by setting the agenda in response to the congregation's circumstances.

A systems approach holds out the vision of congregational communities functioning in healthier ways. Rabbis, congregants and congregation leaders yearn for healthy congregations. But what is "health?" Peter Steinke notes (*Healthy Congregations: A Systems Approach*, pp. 3-13):

From a systems approach, we look at the health of a congregation as a process. "Health" correlates with how a congregation manages its wholeness, that is, its interconnectedness. ... In "wholeness" differences are not eliminated; rather they become alive ... different parts interact and cooperate. ... As a system, a congregation influences its own health. By taking responsible action, it shapes its destiny. ... A healthy congregation is one that actively and responsibly addresses or heals its disturbances, not one with an absence of troubles.

The real work of a congregation is managing its ongoing life and continuously adapting to change, rather than focusing only on discrete problem-solving. The systems approach provides important and helpful insights for rabbis and congregations engaged in this central activity.

## **Rating the High Holidays**

Rabbi Richard Hirsh

The Forward, September 7, 2007

What we frequently refer to as the High Holy Days are more accurately described by their Hebrew appellation: *Yamim Noraim*, the "Days of Awe." Rosh Hashanah and Yom Kippur are supposed to be significant because of the weighty confrontation with ultimate issues that they embody, especially issues of morality and mortality.

For many rabbis, however, another translation of *Yamim Noraim* is more accurate: these can be "awful days," a mere three out of 365 by which reputations and even employment are often measured. For rabbis whose contracts are up for renewal, the prayer refrain "On Rosh Hashanah it is decreed, and on Yom Kippur it is decided... who will live and who will die" has a quite literal meaning.

At the end of the fall holidays, many rabbis suffer through something called "the High Holiday Review Committee." Often these are meetings open to the whole congregation, and as is the nature of such meetings, they are often attended by a disproportionate number of people who have a complaint rather than a compliment.

The operative assumption of such a meeting is that liking or disliking is the barometer by which the High Holy Days are evaluated. But because liking or disliking is by nature subjective, comments at such meetings often cancel each other out.

Consider the following scenario, drawn from an actual post-High Holy Day review meeting: One person objects to the holiday *nusach* used for chanting the *Shema*, and wants the familiar and friendly Shabbat melody. The next person replies that he comes expecting to hear the holiday *nusach* because it is different. The first person retorts that she does not come much during the year, and likes hearing what she knows, to which the second person replies that she ought to come more often during the year.

Or this: One person objects to the Martyrology service on Yom Kippur being moved to the afternoon Mincha service, instead of being attached to the morning Yizkor service. The rabbi explains that in addition to making the morning service even longer, her judgment is that the Yizkor service plus the Martyrology yields a period of up to a full hour that is too heavy. The person then says that since she is a Holocaust survivor, if the Martyrology and Yizkor are not reattached, she is quitting the congregation.

Or this: One person objects to the rabbi's sermons all being about Judaism, saying she is not religious; instead, she says, there should have been sermons about current events. Someone else replies that such matters can be dealt with the rest of the year; on the holidays, the focus should be on more spiritual things.

Where did the idea arise that the *Yamim Noraim* services need to be reviewed? This is not, after all, a Broadway show, yet too often the post-holiday open meeting — tellingly referred to in many communities as the “postmortem” — functions as if a staged performance is being critiqued, with particular attention to the quality of the entertainment.

The review of the holidays might not be so distressing if the analogy to a stage presentation were at least consistent. If congregations correctly understood that the rabbi is, and needs to be, in the role of director, then the accountability assigned to the rabbi after the services would at least correlate with the responsibility assigned to the rabbi before the services.

In the theater, someone is ultimately responsible for looking at the bigger picture, at the total production, and making decisions about what stays and what goes, where things happen, how much of what each faction wants can be accommodated and what is going to be cut. The customers, musicians and actors may not all be happy with the decisions, but someone has to make them.

Synagogue High Holy Day committees used to deal with necessary logistics such as childcare, assignment of ritual honors and ushering. Now such committees often compete with the rabbi for control and content of the services.

Put differently, such committees disempower rabbis from their central role as the director of the *Yamim Noraim* services — the one who, with a vision of the whole, must make necessary decisions between competing factions and among competing wants and needs in order to shape a service that enables those davening to be supported in their spiritual work.

It is important for feedback to be solicited; the problem with High Holy Day review committees is that they do not shape a conversation that emerges from a context, but function instead as something like a customer-satisfaction focus group, with volunteer committee members refereeing among personal preferences.

The chair of such a committee should instead set the tone of the meeting by asking the right questions. By way of example, these could, include:

“Given the diverse nature of our community, did our services manage to provide comfortable access for most people?”

“Given the need to balance personal reflection and prayer with communal participation and congregational singing, did our services allow enough time for both?”

"Given that many of our members are familiar with the liturgy while many others are not, did our services hit a reasonable balance between fidelity to the core structure and innovation?"

"Given that this year we decided to try a new innovation, do we have enough sense of the response to try it again, drop it, or modify it?"

"Given that we assign the final responsibility for shaping the *Yamim Noraim* services to the rabbi, are there suggestions you might want to offer to her for consideration for next year?"

"Given that there are many opportunities for spiritual enrichment, what was one moment during the services that you felt was particularly powerful for our community?"

For our communities to fulfill the high expectations we have for them, we need to think in terms of "we" and not "me." Congregants should come to the *Yamim Noraim* with the expectation of working on *teshuvah*, and then rate the services in terms of how well the services supported that work. That will be an authentic indicator of how well a community and its rabbi work together to accomplish the holy work of the season of repentance.

## Levels of Conflict

### Speed Leas

Summarized from Moving Your Church through Conflict (Alban Institute)  
 The downloadable publication may be purchased at <http://www.alban.org>

<b>LEVEL I: Problems to Solve</b>	<ul style="list-style-type: none"> <li>• People have real, acknowledged differences. The problem is not the result of a misunderstanding.</li> <li>• The participants’ objective is to solve the problem.</li> <li>• The language they use tends to be clear, specific, “adult” oriented to the hear and now, and not blaming or loaded with innuendo.</li> <li>• The parties confront the problem, not the person with whom they disagree.</li> <li>• They typically engage the conflict openly, they invite each other to describe the problem and what they want, they fully share information, and they allow participation by everyone.</li> </ul>
<b>LEVEL II: Disagreement</b>	<ul style="list-style-type: none"> <li>• People do not communicate openly and completely.</li> <li>• Their objective is self-protection. They are less concerned with problem-solving and more focused on looking good and protecting themselves from emotional hurt.</li> <li>• The language used shifts from being specific to general. People stop naming the individuals with whom they are having difficulty (e.g., referring to “some people”). They also speak in general terms about the problem (e.g., “We need better communication. Trust is lacking.”)</li> <li>• People become wary about sharing all they know. They tend to withhold information that might enhance the “other” or hurt themselves.</li> <li>• Compromise is an often-proposed strategy, but seldom is employed.</li> <li>• Hostile humor is used in verbal exchanges.</li> <li>• The parties confer with friends to strategize about their next meeting with the opposition.</li> </ul>
<b>LEVEL III: Contest</b>	<ul style="list-style-type: none"> <li>• A w/lose dynamic comes into play; the participants’ goal is to win.</li> <li>• Communication becomes less direct, and distortion becomes a problem. People tend to exaggerate, overgeneralize (e.g., “you always” or “he never”), dichotomize (e.g., right/wrong; us/them), and ascribe motives to the other side’s actions.</li> <li>• People find allies who think as they do. These factions look for victories, for evidence that their group has more power or control over others. Participants also involve outsiders in planning strategy.</li> <li>• People find it difficult to see more than two alternatives. They tend to see everything in black and white, with little awareness of gray areas.</li> </ul>

<p><b>LEVEL IV: Fight/Flight</b></p>	<ul style="list-style-type: none"> <li>• Primitive survival responses emerge. Participants do not believe the “others” can or will change, so their objective is to hurt and/or remove these others from the congregation (e.g., by getting the pastor fired, forcing others from the congregation, or convincing others to join themselves in leaving the congregation).</li> <li>• Language becomes ideological. People talk about principles more than issues. They refer to eternal verities (e.g., truth, freedom, justice) or incontrovertible rights. These principles are used to sanctify the combatants and make it possible for them to be less concerned with the ethics of their actions.</li> <li>• Factions solidify. Clear lines are drawn between “camps.” Strong leaders emerge, and members of factions conform to the wishes of the leaders and the will of the group. Subgroup cohesiveness is more important than the health of the total organization.</li> <li>• The parties are on hostile terms. People become unforgiving, developing a cold self-righteousness.</li> <li>• The parties also become detached from one another, which prevents awareness of the pain they cause others.</li> </ul>
<p><b>LEVEL V: Intractable Situation</b></p>	<ul style="list-style-type: none"> <li>• The conflict is no longer within the control of the participants. The only solution is to separate the groups from one another.</li> <li>• Their objective is to destroy the “others.” The opposition is seen as harmful to society and to be removed (e.g., getting a pastor dismissed from his current post as well as preventing him from obtaining another position).</li> <li>• The conflict is framed in terms of universal principles and eternal causes.</li> <li>• The parties believe the stakes are so high that they are morally bound to continue fighting. Prolonged conflict is therefore viewed as a necessity. To cease fighting is not seen as an option.</li> </ul>

## Frequently Asked Questions About Rabbinic Evaluation

The Jewish Reconstructionist Federation  
The Reconstructionist Rabbinical Association

September 2004 / Tishrei 5765

*For more background, context and information, we recommend reading The Rabbi-Congregation Relationship, a Vision for the 21<sup>st</sup> Century, the 2001 report of the Reconstructionist Commission on the Role of the Rabbi, especially Part III, and the section on "communication" on pages 64-74. The report is available from JRF.*

### **Q: What kavanna (intention) should govern evaluation?**

Evaluations should be conducted in ways that support and strengthen the rabbi-congregational relationship. Rabbis and congregations should focus on the "valu[e]" in "e<sup>valuation</sup>," with an emphasis on how the rabbi contributes to the life of the congregation. Keep in mind that a goal of evaluation is to increase the effectiveness of the *congregation* in fulfilling its mission.

### **Q: How does the Reconstructionist movement see the issue of evaluation?**

A: A productive and continual process of communication, review and evaluation should focus on how the *entire congregational community* is fulfilling its goals, mission and vision. It should *not* focus only on the rabbi, but on the rabbi within the larger context of the congregation.

### **Q: What is the purpose of rabbinic evaluation?**

A: Evaluation should be a helpful tool for ongoing monitoring of the rabbi-congregation relationship. Evaluation should celebrate success, identify mistakes, note progress, indicate areas open to growth, and help to resolve problems. Evaluation can identify adjustments needed in a job description, and note areas where the rabbi needs increased support.

### **Q: When should evaluation take place?**

A: In addition to the regular communication and feedback between the rabbi and congregation leaders, many congregations and rabbis find an annual evaluation of the rabbi's accomplishments within the congregational system to be a useful resource.

The rabbi and congregational leaders should establish goals for the congregation and the rabbi not later than the month of Elul (August-Sept.), a time of reflection and assessment. Some congregations do this earlier in the spring when preparing the program and budget for the coming year. The season of Shavuot, with its theme of harvest, should be a time for reviewing those goals.

### **Q: What should evaluation focus on?**

A: Evaluations should be both retrospective (focusing on what was/was not accomplished) and prospective (focusing on what where things ought to be going).

Evaluations should also note areas of strength and success, and identify areas where improvement or correction can be made. Evaluations should also note progress on issues identified in earlier evaluation cycles.

Rabbis benefit most from feedback on how they fulfill their primary roles as spiritual leaders. These generally include: teacher, pastor-counselor, "officiant," service leader, administrator.

**Q: Who should supervise rabbinic evaluation?**

A: Experience shows that effective evaluation is usually a subset of an effective relationship between the rabbi and congregation leaders. A small group of such leaders should be able to collect information and discuss with the rabbi trends, issues and ideas that represent significant concerns.

Feedback needs to be filtered; not every concern and complaint needs to be shared with the rabbi. Congregation leaders should try to identify a few significant common themes, concerns or issues that are representative of a broader set of responses.

**Q: Should evaluation be part of a rabbi's contract renewal process?**

A: No. Evaluation is a tool of communication, not a referendum on the rabbi. When evaluation is tied to contract renewal, it cannot fulfill this function, and instead often becomes, for the rabbi, a "popularity contest," and something against which to be defended.

If the congregation's leaders and rabbi regularly share their concerns, and there is a more formal and documented evaluation each year near Shavuot, there is no need for a separate evaluation when contract renewal is under discussion; the congregation's leaders should already have in hand the information from prior evaluation cycles. All records of evaluations conducted during the term of the existing contract should be available to the board or board committee responsible for the decision on contract renewal.

**Q: Should we use a survey of the congregation as part of evaluation?**

A: No. Experience shows that surveys are counter-productive, unhelpful, and inappropriate for assessing the contribution of a rabbi to a congregation. Surveys inevitably emphasize the negative and generate tension, instead of providing useful information. Given the multiple tasks and roles a rabbi is called upon to fulfill, many of which take place in highly personal and often confidential circumstances, attempts to quantify a rabbi's contributions to a community are not appropriate.

Under no circumstances should feedback be accepted anonymously, which places the rabbi in a totally unfair position, with no ability to respond.

**Q: How can congregants communicate with the leaders of the congregation?**

A: The congregation should be aware that an annual rabbinic evaluation focusing on goals takes place. The president of the congregation should remind the congregation of this sometime near Pesach, usually through the congregation newsletter, and identify what channels of communication are (always) available so that compliments as well as concerns can be conveyed by members of the congregation.

**Q: What happens after the evaluation is completed?**

A: The evaluation committee should first discuss the evaluation with the rabbi. Next, the committee drafts a written summary that is shared with the president and the rabbi; the rabbi has the option of submitting a response. The president and the executive committee should then review the summary (and response, if included), and report to the board. A copy of the summary (and response) should be filed for future reference.

## Rabbinic Evaluation Guidelines

JRF Department of Outreach and Congregational Services

May 2002

Companion suggestions to the Rabbi-Congregational Relationship Report published by the Reconstructionist Movement (See Part III of report) and JRF's Sacred Trust Resource Book (section F-Lay/Staff Relations)

1. An evaluation committee of 4 to 5 people should be formed. These should be veteran members, people who are seen as fair-minded and without any kind of axe to grind. Although the rabbi shouldn't name the committee, he should have veto power if he feels strongly that someone is not appropriate for the committee.
2. The committee should look carefully at the rabbi's job description. The rabbi's job responsibilities should be ranked in terms of priority, and this prioritization should inform the rest of the process (that is, you don't want to spend most of the committee's time reviewing aspects of the rabbi's job that are not considered much of a priority).
3. From this, they should decide which were the committees that the rabbi interacted with most. (Education, ritual and executive are usually good places to start.) The Evaluation Committee should speak to the chairs of each of these committees. The essential question is the rabbi's contributions vis-à-vis the goals of the committee. The basic questions to be addressed are:
  - a) What were the goals of the committee coming into this year?
  - b) What was the rabbi's contribution to those goals supposed to be?
  - c) How effectively did the rabbi help the committee to fulfill those goals?

This can be broken into further subcategories:

- d) Objective: Did the rabbi teach the four adult education classes that were in the job description?
- e) Subjective: How well did the rabbi teach the courses?
- f) The experience of working with the rabbi. For instance: was the rabbi on time to the meetings? Did he work cooperatively with the committee members? etc.
 

**NOTE:** It should be understood that this is limited to those aspects of the rabbi's job description that intersect with the work of the committee, and is not an ad hoc evaluation of the rabbi's total job by each committee or each committee chair.
4. In addition, and as part of making this a mutual evaluation, it is worthwhile for the committee to take this opportunity to reassess its goals for the coming year.

5. The Evaluation Committee should choose a sampling of people who have had pastoral interactions with the Rabbi (e.g. a wedding, funeral, or hospital stay) over the year and speak with them about their interactions with the rabbi. You can do the same thing with a selected number of people from the rabbi's other responsibilities, notably a couple of regular attendees at services.

(You will notice that the interviews are targeted, a couple of people from each constituency, the idea being that a representative sampling of people is interviewed about interactions with the rabbi and his work. In this model, people are only speaking about their particular area of experience or expertise, and are not asked about the whole range of the rabbi's responsibilities, which they may not know about. In addition, we have determined that too wide a sampling can undermine the rabbi's place in the congregation.)

6. The Committee puts together a preliminary report, which it shares with the rabbi. The rabbi is given the opportunity to comment on any areas that he may feel necessary.
7. The Committee will then submit a final report, incorporating that rabbi's comments, to the board. Using the report, the board and the committee will draw up a new list of goals for the rabbi for the upcoming year, as well as any steps of strategies to that will support and sustain the rabbi-congregation relationship.

### **Important notes:**

- The rabbi's evaluation is confidential. The goals for the coming year can be published.
- In addition to the committees' self-evaluation, it is useful for the board as a whole to take this opportunity to look at the work it's been doing, in terms of the goals it has set for itself previously and how it is or is not meeting those goals, and updating the goals for the coming year.
- This process should take no longer than 4-6 weeks total. Any longer will serve to undermine the relationship between the rabbi and the congregation and some or many of the individuals involved in the process.
- The end of the program year/summer is the best time to do this.

## **FURTHER RESOURCES**

### **The Rabbi-Congregation Relationship: A Vision for the 21st Century Report of the Reconstructionist Commission on the Role of the Rabbi**

The Reconstructionist Commission on the Role of the Rabbi (2001)

⇒ <http://www.jrf.org/pub/cat-papers.html>