

## **Guide to Congregational - Rabbinic Evaluation**

The goal of evaluation is to measure how the congregational system is doing and to look at the rabbinic role in that system.

This guide will be in three parts. Part 1 will address common questions about evaluation. Part 2 will provide a model that congregations and rabbis can use for an evaluation. Part 3 will provide additional materials to help inform the process.

(The guide will be updated from time to time.)

### **PART 1**

#### **FREQUENTLY ASKED QUESTIONS ABOUT RABBINIC EVALUATION**

*(Richard Hirsh)*

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

A: Evaluations should be conducted in ways that support and strengthen the rabbi-congregational relationship. Rabbis and congregations should focus on the “valu[e]” in “*evaluation*,” 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.

## **PART 2**

The process of systemic evaluation can begin with a question: How are we as a congregation doing? For each area that needs work the rabbi and the congregation/board should decide on what actions each needs to take to move forward. On an annual basis this should take the form of goal setting for the upcoming congregational year. For each goal the role of the rabbi, other professional staff, committees, president, officers, executive committee, board and congregation should be set forth. At several points during the year the goals should be reviewed and adjusted as needed.

### **Goal Setting Areas**

worship  
pastoral  
life-cycle  
ritual policy  
community relations  
administration  
education – children/ families/ adults  
financial health  
long-range planning

An evaluation of the rabbi should be based on the goals that have been set. There should be a liaison committee established which can work with and support the rabbi in reaching the goals. The congregation should know who is on the committee and how to reach them so as to provide feedback on an ongoing basis. A more formal review is best done around Shavuot before the goals are set for the next congregational year. The liaison committee could conduct the evaluation using what it has learned during the year and through interviews with at least five congregational leaders which might include the president, the chairs of key committees, the chair of a major program the rabbi was central to... This review would look at strengths and successes, where the rabbi is with goals, areas for growth and improvement, resolving problems or issues which may involve reviewing the rabbi's job description and the support system that the rabbi has available.

The results should first be shared with the rabbi who should be given an opportunity to respond. The results could then be shared with the board and in a more general way with the community. The congregation will also need to review where it is with the goals for the year. Finally a new set of goals can be established.

### **EVALUATION** (this section comes from what one congregation does)

Rabbinic performance shall be evaluated annually, or at such other times as directed by the Temple, in conjunction with a congregational self-evaluation of its effectiveness in fulfilling its mission and meeting its annual goals. The annual evaluation process shall occur during the

months of Iyyar and Sivan (April/May) and shall be based on goals established as a result of the previous year's evaluation.

The purpose of the rabbinic performance evaluation shall be to (1) identify areas of strength and success; (2) note progress on goals; (3) identify areas open for growth or in need of improvement; (4) resolve problems, with special attention devoted to identifying adjustments needed to the Rabbi's job description and to identification of areas where the Rabbi needs additional support; (5) development of goals for rabbinic performance for the coming year in conjunction with congregational goals established by the Board.

The rabbinic evaluation shall be conducted by the Rabbi Liaison Committee through interviews with the President and at least five other congregational leaders, including the chairs of the Religious Practices Committee and the Education Committee. Areas of evaluation shall include (1) service leadership; (2) pastoring; (3) teaching; (4) life cycle officiating; (5) community relations. The Liaison Committee shall report its findings on each of these areas to the Rabbi and the Board of Trustees.

### **PART 3**

#### **LIAISON COMMITTEES**

##### **Source: THE RABBI-CONGREGATION REALTIONSHIP: A VISION FOR THE 21<sup>ST</sup> CENTURY**

Report of the Reconstructionist Commission on the role of the rabbi (Pages 67-69)

Many congregations have a rabbi liaison committee to facilitate communication. A liaison committee can be an effective channel that eases frictions that arise at times in the rabbi's relationships with the president, the executive committee or the board.

There are several possible models for such a committee. One option is to have a formal committee charged with specific responsibilities, whose work is integrated into the communication system of the congregation (executive committee and board, for example). This type of liaison committee could be a small-scale two-way channel for the rabbi and congregation to conduct the ongoing business of their relationship. In a large congregation with a large board and/or executive committee, a liaison committee can be a helpful smaller-scale conduit. Such a liaison committee might also have responsibility for ongoing mutual feedback between the congregation and the rabbi.

An alternative model is for a liaison committee to be informal, with the primary function being support for the rabbi -- a rabbi's "kitchen cabinet." This type of liaison committee would be a relatively safe space for the rabbi to raise concerns, discuss problems and strategize solutions. However, the rabbi remains an employee, and the members of a liaison committee remain congregants; a rabbi should not assume absolute confidentiality and should exercise discretion with even the most supportive liaison committee. When needing absolute confidentiality and a totally safe space in which to discuss issues, rabbis should consult with professionals, colleagues and friends outside of the congregation. The RRA staff, in addition to being available to rabbis, can connect rabbis with other resources.

If the liaison committee supervises or evaluates the rabbi, this should be clearly communicated and understood by all parties. It is also prudent to ascertain to what degree, if any, the congregation's by-laws might be in conflict with the role of a liaison committee. A liaison committee should not have the authority to terminate a rabbi, extend or renew a contract, or change responsibilities of employment as agreed to in the rabbi's contract. Those prerogatives belong to the board as the congregation's elected representatives.

Each congregation and rabbi should evaluate the communication channels that exist, and whether they are adequate. Where good communication exists, it may not be necessary to create a liaison committee. If communication is haphazard, informal or imprecise, or if it has been absent or problematic, a rabbi liaison committee might help facilitate better communication.

The question of whether the president should sit on a liaison committee is a complex one. The president and rabbi presumably have a direct channel of communication, and the president is usually over-extended already; having one more committee to sit on may be a duplication of effort. On the other hand, can the president afford not to be part of this primary communication affecting the ongoing relationship between rabbi and congregation?

But a congregation should also anticipate what would happen if it needed to address a bad relationship between rabbi and president and the president were on the liaison committee. Because liaison committees are relatively new, and because of the variety of models and functions they embody, it is difficult to determine a universal guideline. Congregations and rabbis should weigh and balance the advantages and disadvantages of having the president as a member of the liaison committee.

If a liaison committee is formed, it should be kept small. The rabbi and congregational leaders should mutually endorse and trust the members of a liaison committee, and therefore should consult with each other before any invitations are extended. Specific board officers may be appropriate, but a congregation should also consider members with relevant experience, interpersonal skills, sensitivity, a high level of involvement and respect for both rabbi and congregation.

## **Days of Awe or Awful Days? Restoring Authenticity to the Rating of the High Holy Days**

by **Richard Hirsh**

In the Jewish faith, Rosh Hashanah and Yom Kippur are meant to be days of weighty confrontation with the issues they embody (especially issues of morality and mortality), as implied in their Hebrew appellation *Yamim Noraim*, the "Days of Awe." For many rabbis, however, "awful days" might be a more accurate definition for these days, a mere three out of 365 by which reputations are often measured and employment decided. 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 Holy Day 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 the degree to which one liked something 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 melody used for chanting the *Shema* (Dt. 6:4) and wants the familiar and friendly Shabbat melody. The next person replies that he comes expecting to hear the holiday melody *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 perhaps then she ought to come more often during the year.

Or this: One person objects to the Martyrology service on Yom Kippur being moved from the morning Yizkor (memorial) service to the afternoon service. The rabbi explains that, in addition to making the morning service even longer, she believes the Yizkor service plus the Martyrology yields a period of up to a full hour that is just 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 on Rosh Hashanah and Yom Kippur 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 High Holy Day services—the ones 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 praying 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 set a different tone for 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 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 High Holy Days with the expectation of working on *teshuvah* (repentance and resolution), and then “rate” the services in terms of how well the services supported that work. That would be an authentic indicator of how well a community and its rabbi work together to accomplish the holy work of the season of repentance.

*Congregations, 2009-07-01*  
*Summer 2009, Number 3*