

Navigating Synagogue Leadership:

Striking the Balance Between Daily Operations and Long-Term Planning
During Times of Uncertainty

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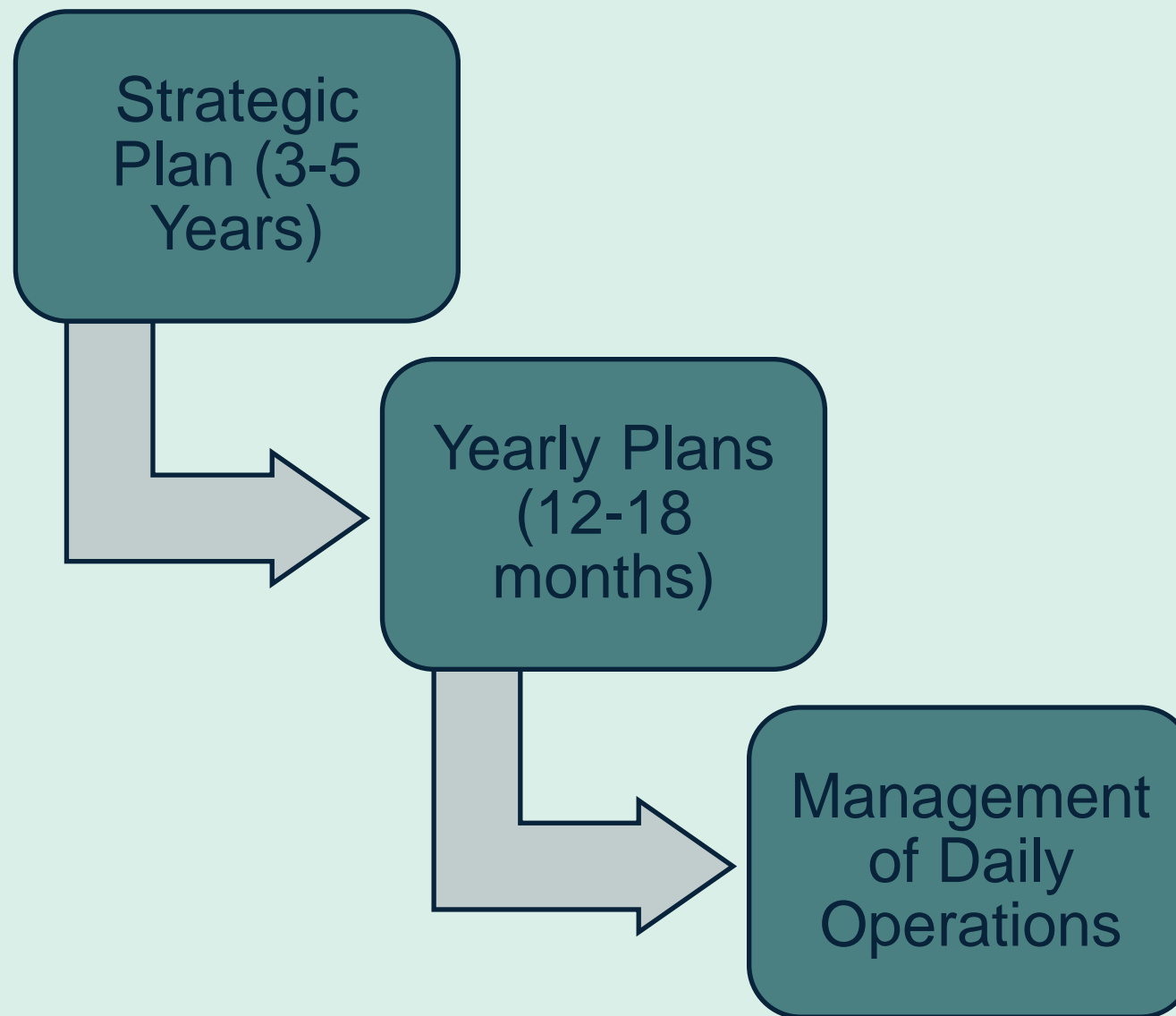
- Co-founder of Effect Collective
- President of Fridman Strategies, Inc.
- 25+ years of experience with nonprofits as a professional, volunteer, consultant & coach
- National speaker, trainer & facilitator
- Author of two books, *On Board* and *Holding the Gavel*
- BA, Tufts University
- MPP, Georgetown Public Policy Institute
- JD, Georgetown Law
- Harry S. Truman Scholar

In the Chat

- Name
- Temple/Organization
- Role

Goals

- Discuss ways to improve the management of day-to-day operations
- Talk about the importance of yearly and long-term plans and share thoughts about formulating them
- Answer your questions



Day-to-Day Operations

- Running the office
- Membership inquiries and support
- Personnel management
- Volunteer management
- Building operations and maintenance
- Security
- Programs and services
- Events

Questions to Consider

1. What policies, systems, procedures and/or processes would help clarify or make your work more efficient?
2. In turn, are there specific pieces of work if organized, that could be delegated?
3. How can you get more people involved in a way that is helpful?

Systems, Procedures & Processes

- Calendar
 - Scheduling Meeting
 - Communication
- Members
 - New Member
 - Termination or denial of membership
 - Resigning Member
- Ritual
 - B'nai Mitzvah
 - Weddings
 - Death
- Staff
 - Recruitment
 - Staff onboarding
 - Off ramping/exit
- Board
 - Recruitment and nominating
 - Board onboarding
 - Meetings
 - Evaluations
- Committees
 - Review and charges
 - Meetings
 - Reporting
- Volunteer management
 - Application
 - CORI
 - Appreciation
- Donor Recognition
 - Pledge recording
 - Thank you notes
 - Stewardship
 - Annual report

Policies

- Members – Participation
- Building – Parking Lot, Cellphone Use, Security, Photography
- Ritual – Shabbat, Kashrut
- Staff – Personnel Policies/Handbook
- Board – Attendance, Giving, Confidentiality, Conflict of Interests
- Donor – Gift acceptance

Be Specific in Your Ask for Help

- What is the task? What will I do?
- What is the purpose of the task? What impact will it have? Why is it important?
- What is the time commitment?
- What support will I have? With whom will I work?
- What will my experience be like? What will I learn?

Who Might We Engage in Our Synagogue Work

- Staff
- Clergy
- Board members
- Committees
- Volunteers
- Professional Advisors
- Pro bono volunteers
- Interns
- Consultants
- Former Board Members
- Future Board Members
- Donors
- Community Members at Large



AI

- External Communication
 - Appeal letters
 - Social media posts
 - Donor thank you notes
 - Newsletter
 - Impact reports/annual reports
- Administrative Tasks
 - Meeting agenda
 - Meeting minutes (fireflies and otter.ai)
 - Board reporting
 - Emails
- Other
 - Generating reports and statistics
 - Grant proposal

Yearly Plans

- Operations
 - Staffing and Volunteer needs
 - Technology
- Building
 - Maintenance
 - Improvements
- Security
- Membership
- Governance
- Fundraising
- Marketing/communications
- Programs and services
 - Calendar

Yearly Planning Questions

- Do you produce written plans? What do they look like? What level of detail? Who has access to them?
- When?
- Who is involved?
- How can you get more people involved in a way that is helpful?

Long-Term Planning Questions

- Do you have a strategic plan?
 - When did formulate your plan?
 - Who lead the charge?
 - Who was involved?
- Do you use your strategic plan to guide your yearly planning?
- Do you report back to your board on your progress against your plan?

Long-Term Planning Questions

- If you don't have a plan, what are the burning issues your synagogue is facing?
- Who is best equipped to help formulate a strategy for meeting those challenges?
- How might you convene a group or think tank for a one-day retreat or longer process?



Q & A

Final Thoughts

- There will always be curve balls.
- Long-term plans provide direction.
- Yearly plans offer a road map.
- Policies, Systems, Procedures, and Processes make day to day operations more predictable and allow more people to help.
- You can expand your team in creative ways.
- Get on board with AI!
- What gets scheduled, gets done! Plan to plan! Winter and summer are great times.



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