



UNION FOR PROGRESSIVE JUDAISM

# **Progressive Management for Progressive Shuls**

**Melbourne  
November 2018**



## Two convincing arguments

- Dina d'malkhuta dina אֲדִינָא דְּמַלְכוּתָא דְּיָנָא, "the law of the land is the law"), is a rabbinic dictum based on the halakhic rule that the law of the country is binding.
- Good management simplifies life, saves time and allows Boards to focus on the important, rather than the urgent



## Background

- Workshop on strategic thinking for synagogue boards on Gold Coast in November 2017
- Interest in Board responsibilities and how to meet them
- Project to build schematic system for UPJ
- Support for idea by Exec
- Survey conducted to see what already exists
- Schematic system built
- Peer review – Dorothy Graff and Alyson Dwyer
- Support to share resources by most synagogues that have well developed systems
- Interest from others to receive assistance



## What's next?

- Review progress today
- What does a good system look like?
- Is it time to panic yet?
- Discuss schematic framework and how to use it
- The goodwill is there – let's discuss the logistics of sharing
- Agree on path forward
- What further support is available?



## It all starts with the Board

Not-for profit Boards have the same duties and responsibilities as commercial ones

- Act in good faith and proper purpose
  - Set strategy, understand and manage risks
  - Provide transparent processes and practices
  - Ensure compliance with legal and policy obligations
- Act with care, skill and diligence
  - Financial accountability – no trading when insolvent
  - Value all its stakeholders
- Not to misuse information or position
- Disclose and manage conflicts of interest



## ...and continues with the Board

Synagogue Boards need to take on additional functions

- Understand and manage risk
- Provide safe environment and qualified personnel to work with children
- Employ sound OHS and HR practices
- Performance management
- Sound and transparent financial management practices
  - Budget, tax reporting, regular audits

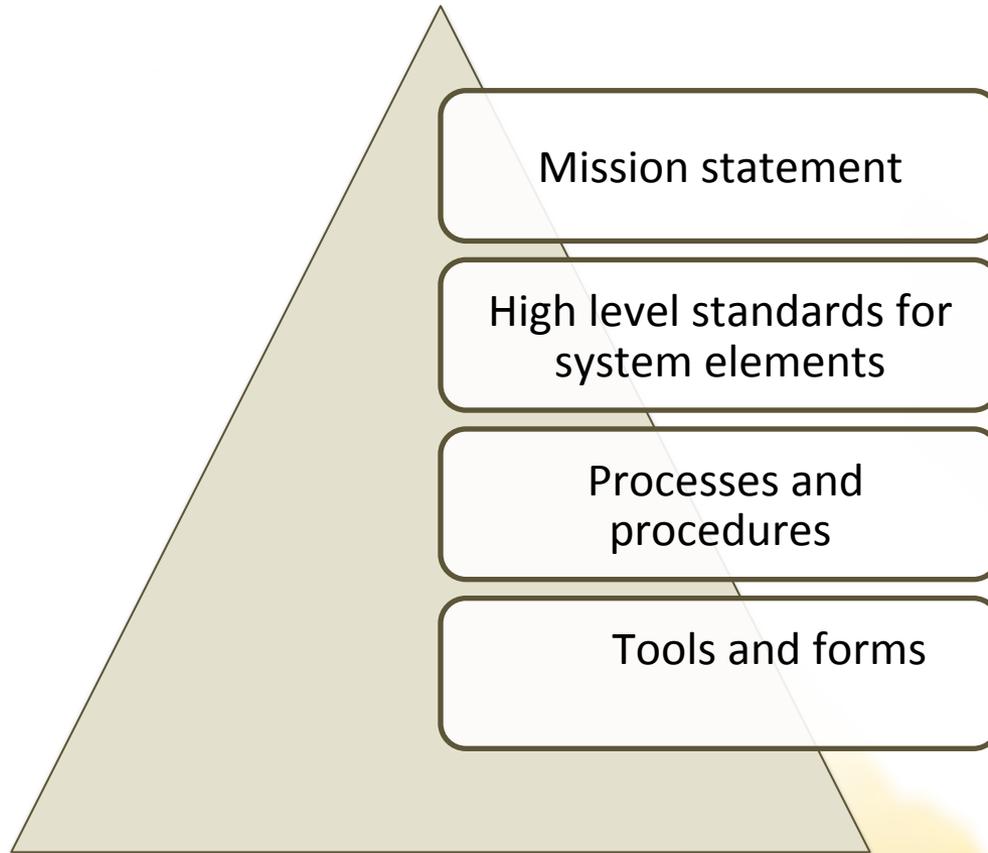


# Benefits of an integrated management system

- Makes management processes transparent
  - No misunderstandings or conflicts
- Easy to understand
- Easy to audit
- **Helps with transition**
- **Ensures consistency**
- **Makes time for important spiritual, educational etc. goals**
- Worst case scenario – good defence



# An integrated system





## Do we really need this??!!???



- Looks scarier than it is
- We DO NOT need it all
- BUT the principles apply to the simplest system

What we really need is to **know** what we **really** need!



## Mission statement

Articulates the intent of the organisation

- Why do we exist? What are our values? What do we strive to do?

Example:

*“Knesset Israel Massachusetts is an innovator in the rapidly changing world of American Judaism. We create authentic and meaningful points of connection and spiritual experiences for contemporary Jews and cultivate a community empowered to make a positive difference in the world. This flourishing congregation is inclusive and supportive and accepts a wide range of beliefs and practice. Among people of all ages, religious backgrounds, genders and orientations, you will find a supportive community here.”*



## High level standards / System elements

- Makes a cohesive system out of a pile of documents
- Helps communication with office, congregants, volunteers etc.
- Front-end loading: invest the time to establish **why** we need to deal with something and **what** do we **expect** about the way they are managed
- High level standards are easy to audit
  - Do we have policies in place?
  - Are they the right ones?
  - Do we adhere to them?
  - If yes, let's move on. If no, throw it out or rewrite it



## High level standards - example

We all rely on volunteers. Establish high level expectations

- Procedures to ensure safe, meaningful work environment for volunteers
- Procedures to recruit and screen volunteers (working with children, food hygiene, etc.)
- Make sure volunteers are aware of their rights and obligations
- Make sure professional and lay leaders support and treat volunteers fairly, including providing training if required
- Assess performance and provide fair feedback



## Processes and procedures – how to

- Do volunteers understand their rights and obligations? Do they know what we would like them to achieve? By when?
- Screening needed to work with children? Who will do it? How?
- Do volunteers have basic OHS knowledge or do we need to train them? Who will train? What will be in the training presentation?
- If volunteers incur expenses will they be compensated? By whom? Is there a claim form to fill in?
- Do people who work in the kitchen understand food hygiene requirements?
- Are we going to assess the performance of volunteers, especially in critical roles, such as leading children's services? Who will do that? Is there a performance management template for volunteers? Is there someone qualified to give feedback?
- Do we have in place customs to thank volunteers? Who organises these events? Is there a budget for it?



# What will you put into your cake?



- Roles, accountabilities and responsibilities
- Risk management
- Financial management including tax, budget and cashflow
- Health and Safety:
  - Physical hazards, occupational health issues, hygiene,
  - Security and crisis recovery.
- Human Resources Management;
  - Recruitment, selection and termination,
  - Performance management including disciplinary procedures,
  - Harassment, discrimination and bullying,
  - Equal opportunity, Privacy, Training.



## What will you put into your cake? 2



- Incident management:
  - Reporting, Investigation, Preventative measures.
- Working with children
- Communication management:
  - Information technology,
  - Social media management,
  - Media management,
  - Dealing with members,
  - External organisations.
- Event management:
  - Recurring events including High Holy Days and Festivals,
  - Special events



## Help is on the way!



WOOHOO!!!

### What the survey told us

- All respondents have something, several have well developed, sophisticated systems
- Every single policy and/or procedure already exist and is held by people who are prepared to share
- *We have no written policies and we need the UPJ's help*
- *People have been working with children but we have no policy*
- *We can gain more than offer but happy to share*
- *Willing to help – we are always improving, getting systems right*
- *We want to help but might also gain something*
- *We are policy heavy and able to provide information for others*



# What someone already has

## Areas

- Board responsibilities
- Risk / risk management
- Audit tools
- Financial management / policies / guidelines
- Vision / mission / values
- Key management responsibilities
- Working with children
- Health, Hygiene, safety, security and environment,
- Crisis recovery
- Human Resources Management
  - Recruitment, training, performance management
  - Harassment, discrimination, bullying, equal opportunity, privacy
- Volunteer management



## What someone already has 2

- Incident Management
  - Reporting, investigation, preventative measures
- Communication management
  - IT
  - Social media management
  - Media management
- Synagogue specific
  - Event management, recurring, life-cycle and one off
  - Dealing with members
  - External organisations
  - Invited guests, speakers, performers
  - Kashrut
  - Outreach
  - Fundraising
  - Hebrew and Religion School



## What next?

Where we need more work

- How is the sharing going to occur?
- Where does the responsibility lie?
  - **Always with the receiving organisation!**
- Technology – do we have it yet?
- If not how?
- Offer of free consulting



WOOHOO!!!



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**Thank you for your time and input**

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