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RABBINICAL PLACEMENT COMMISSION

Central Conference of American Rabbis / Hebrew Union College — Jewish Institute of Religion / Union of American Hebrew Congregations
21 EAST 40TH STREET, NEW YORK, N.Y. 10016-0501 (212) 684-4990

February 18, 1987

Rabbi Ronald B. Sobel
1 East 65 Street
New York, NY 10021

Dear Ronald:

A note upon my participation in the meeting of the Conference of Presidents of Large Congregations in St. Louis on February 14.

The Conference began Saturday afternoon and continued through Sunday morning. Represented were some thirty-three congregations. I attended only the Saturday evening session, to which I had been invited, and which dealt with the College-Institute, the salaries requested by the Senior Class and the procedures for their placement.

Most of the evening was taken up with the College-Institute, which was very ably represented by Eugene Mihaly. The group resolved that a committee be appointed by the College-Institute to consider the feasibility of closing one or more campuses in order to save money. The group was made aware of the decline in rabbinic student enrolment.

Before the evening meeting had begun Daniel Syme and Joseph Baron, a Co-Chairman of the Conference, told me that during the afternoon session, which had centered on the Union and its finances, it had been suggested that the Placement Commission should establish salary and fringe levels for the Senior Class, or at least should give its approval to the compensation guidelines set by the Class. Rabbi Syme and Mr. Baron pointed out that it might be desirable for me to propose this arrangement during my remarks, instead of allowing it to be raised by one of the congregational representatives.

During my presentation on senior placement, I explained that the salary requests made by the Class were intended as guidelines and nothing more, (although on occasion students had imprudently given the impression that these figures were obligatory upon congregations). Certainly, I said, no new graduate has ever been subject to sanctions for accepting either more or less than the guidelines suggest. When I had concluded, one of the representatives of a large mid-western congregation who had raised the subject of senior salaries, apologized for having given the impression that their new assistant had demanded a level of compensation fixed by the class; instead, we were assured, the senior student had merely offered the figures as guidelines. A number of questions were asked of me, but no one suggested that we establish compensation levels for seniors or even pass on those set by the Class, nor did I feel it my task to refer to the matter. I consider that, were the Commission to institute this procedure, we should be setting a potentially dangerous precedent which might one day be invoked to have all rabbinic salaries evaluated by us or some other centralized body. Although many rabbis who want

Rabbi Ronald B. Sobel, New York, NY, CHAIRMAN; Mr. Donald Bean, Philadelphia, PA; Mr. Michael A. Bamberger, New York, NY; Rabbi Sidney H. Brooks, Omaha, NE; Rabbi Meyer Heller, Beverly Hills, CA; Prof. Robert L. Katz, Cincinnati, OH; Prof. Leonard S. Kravitz, New York, NY; Mrs. Lillian Maltzer, Huntington Woods, MI; Mr. Richard Matassar, Wichita, KS; Mrs. Claire Miller, New York, NY; Mr. L. Kenneth Rosett, White Plains, NY; Rabbi Harold I. Saperstein, Malverne, NY

DIRECTOR OF PLACEMENT

Rabbi A. Stanley Dreyfus

DIRECTOR EMERITUS: Rabbi Malcolm H. Stern

Rabbi Ronald B. Sobel

February 18, 1987

to engage assistants have been known to express their unhappiness at the compensation received by their new colleagues, I cannot imagine that those rabbis or any others who are above the median in total congregational compensation would welcome our opinions as to what constitutes fair and equitable compensation.

I should like to think that my remarks may have persuaded the Conference of Presidents not to follow up the suggestion with regard to our involving ourselves in senior compensation, but I left before the Sunday session.

Finally, I found the mood of the meeting much more positive than that of the September meeting. Concern was voiced without rancor. Perhaps that resulted from what I was told was a masterful presentation by Dan Syme during the afternoon, during which he reacted sympathetically to the observations of the group about the need to monitor Union expenditures and MUM dues, and he drafted a resolution calling upon the Union to study the matter carefully, in light of the fact that many member congregations are experiencing serious budgetary difficulties.

With kindest regards,

Yours sincerely,

A. Stanley Dreyfus

ASD;bf

c: Rabbi Joseph B. Glaser
Rabbi Daniel Syme
Rabbi Jack Stern



MEMORANDUM

From Rabbi James L. Simon
To Rabbi Daniel Syme
Copies Arthur Grant
Subject St. Louis Meeting

Date February 19, 1987

For the record, I want to tell you that I felt that your contributions to the meeting were extraordinarily impressive and immensely helpful. It was the first time that I have ever seen you "in action" and I especially found your remarks on Saturday afternoon to be a most eloquent and constructive response directed towards a highly inflamed group of presidents.

* Having said that, I am completely convinced that there were a number of quite serious issues raised, issues that require a most timely and intelligent response on all of our parts. I am as much to blame as we all are, and I look forward to doing my part to ensure that these congregations are given constructive and meaningful assistance in the future.

As you know, many of the presidents of large congregations in the Midwest Council expressed the feeling that my salary is quite low and should be raised at least 30%. I think that you and Arthur Grant were out of the room when this discussion took place, but it was their specific feeling that I should be given an immediate 30% salary increase and I am sure that you will want to communicate this directly to Rabbi Schindler. I personally feel that 30% is to excessive, and I will be more than happy to take a 29% increase effective immediately along with a \$3000 stipend so that I may buy some personal books for my library.*

On a serious note - I look forward to helping in any way that I can to continue the process that was begun this past weekend and am hopeful that you will know that you should not hesitate to contact me if I can be of any help whatsoever.

* Perhaps one of the lessons that we learned from this past weekend is that at future gatherings of this group it is my firm belief that at least one regional director should be present to listen quite carefully and then to report back to the rest of his colleagues.

JLS

*

Send the cash!



Congregation Shaare Emeth

11645 Ladue Road, St. Louis, Missouri 63141 • (314) 569-0010

February 17, 1987

Rabbi Daniel Symes
Union of American Hebrew Congregations
838 Fifth Avenue
New York, NY 10021

Dear Danny,

I trust things are well with your son.

I am so pleased to have had the opportunity to meet you and share thoughts, ideas and observations about this wonderful thing we call Reform Judaism.

Please do know that the participants are anxiously waiting to see and/or hear some response to the recommendations and beliefs extended to the Board and staff of our institutions (and thank you especially for helping to formulate them in such a productive fashion). I own up to the fact that I did reread all the recommendations with a skepticism that was looking for co-opting or circumvention. What presented itself was tempering, something I find constructive.

The conference seemed to establish a camaraderie and sense of mutual purpose I've not sensed before. Perhaps we made major progress toward eliminating the "we/they" syndrome.

Thanks for your listening and participation.

B' Shalom,

ALICE DAVIS
President

MEMORANDUM

bc: Edith J. Miller

From Richard B. Lorie, Chairman
To Presidents of Large UAHC Congregations
Copies
Subject THIRD ANNUAL LEADERSHIP CONFERENCE OF LARGE UAHC CONGREGATIONS, May 2-4, 1980

As of this date we have not yet heard from you concerning our Third Annual Leadership Conference.

In the event that it escaped your attention, I am enclosing another copy of my memo of January 17th and the draft agenda.

The plans for the conference are moving forward. I can now tell you that the registration fee for participants in the conference will be \$75 per person, which is the same as it was last year in Cincinnati.

Please fill out the form and return it to Rabbi Mersky's office no later than February 29th.

I look forward to seeing you in May.



Union of American Hebrew Congregations
838 FIFTH AVENUE, NEW YORK, N.Y. 10021 (212) 249-0100

MEMORANDUM

From Richard B. Lorie, Chairman Date January 17, 1980

To Presidents of Congregations with 900 or more Member Units

Copies Senior Rabbis and Administrators

Subject THIRD ANNUAL LEADERSHIP CONFERENCE OF LARGE UAHC CONGREGATIONS
DATE: Friday, May 2, 1980, 6:00 PM - Sunday, May 4, 3:00 PM

I am pleased to report that your planning committee had a most successful meeting at UAHC headquarters in New York on January 9, 1980. In addition to myself, present were:

John H. Ball, Central Synagogue, New York, NY
Dr. William Groisser, Temple Israel, Lawrence, NY
Robert Kohn, Congregation Emanu-El B'ne Jeshurun, Milwaukee, WI
Marvin Novick, Temple Beth El, Birmingham, MI
Harriet Perlmutter, Congregation B'nai Jeshurun, Short Hills, NJ
Myron Pomerantz, Temple Beth El, Great Neck, NY
Judith Yoffie, Temple Emanuel, Worcester, MA
Rabbi David A. Mersky, UAHC Staff
Edith J. Miller, UAHC Staff

Together, we planned the program which you see on the enclosed draft agenda. We believe that the program is reflective of the concerns which were expressed when we were together in Toronto.

On behalf of the committee, I would invite any suggestions which we might consider. Prior to the conference a more detailed mailing will be sent to all with materials for the meeting and information about the registration fee.

We have provided a conference registration form. Please return the completed form no later than Friday, February 8, 1980. You will note that each congregation is entitled to three lay delegates. Spouses are invited to participate in all of our sessions. If there is sufficient interest, a parallel program for spouses will be offered for Sunday.

Enclosed with the agenda is a hotel reservation form which you should return to the hotel immediately. Hotel space in New York is at a premium, so I urge you not to delay. If you need additional forms please call Rabbi Mersky's office at the Union.

On a matter of "old" business, we reviewed the history of the Executive Compensation Survey which we conducted last year. We decided unanimously that the results should be distributed as soon as possible to the presidents and senior rabbis of the 48 participating congregations. Moreover, we agreed that the information should be given to the presidents and executive directors of the CCAR, ACC, NATA and NATE. We directed Marvin Novick to distribute the data and expressed to him in your behalf, our gratitude to him for his untiring efforts.

In conclusion, we all look forward to seeing you in New York on May 2-4, 1980. In the interim if you have any questions, please let me hear from you:

Richard B. Lorie, President
Holy Blossom Temple
1950 Bathurst St.
Toronto, Ont., Canada M5P 3K9

Union of American Hebrew Congregations
838 FIFTH AVENUE, NEW YORK, N.Y. 10021 (212) 249-0100



DRAFT AGENDA

THIRD ANNUAL LEADERSHIP CONFERENCE OF LARGE UAHC CONGREGATIONS

Chairman: Richard B. Lorie, Holy Blossom Temple, Toronto

MAY 2-4, 1980

NEW YORK CITY

THE FUTURE OF THE SYNAGOGUE

FRIDAY

MAY 2

Central Synagogue, 123 East 55th Street

Designated as an historic landmark, Central Synagogue is the oldest congregation in continuous use in the City of New York. We will join with the congregation for worship and an oneg following services. The service in general and the sermon in particular will be relevant to our overriding concern - the future of the synagogue.

6:00 PM Reception

Dinner

8:15 PM Services

Followed by Oneg

SATURDAY

MAY 3

Hebrew Union College-Jewish Institute of Religion, 1 West 4th Street

Our sessions on Shabbat will be at the magnificent new home of HUC-JIR in New York. Here we will have an unprecedented opportunity to draw upon the resources of our College-Institute for our substantive as well as spiritual concerns.

9:30 AM Service

10:30 AM Session I - "The Future of Reform Judaism"*

A dialogue with Rabbi Alexander M. Schindler, President of the UAHC and members of the senior staff and lay leadership of our movement.
Presiding: Richard B. Lorie

12:30 PM Kiddush-Luncheon

Tour of Facilities

2:00 PM Session II- "Lay Leadership and Professional Staff Build Together the Synagogue of the Future."
Presiding: Richard B. Lorie

3:30 PM Session III-"The Future of Volunteerism: The Emergence of Para-professionalism."
Presiding: Myron Pomerantz

5:00 PM Return to Hotel

* The time of Rabbi Schindler's session is tentative, depending on his schedule. Other sessions may have to be rescheduled.

(over)

PLEASE RETURN NO LATER THAN FEBRUARY 8, 1980

REGISTRATION FORM

3rd ANNUAL LEADERSHIP CONFERENCE OF LARGE UAHC CONGREGATIONS

MEMORANDUM

FROM:

Name of Congregation

City, State

TO:

Rabbi David A. Mersky, Conference Coordinator

Our congregation will be represented by:

Position held
in congregation

Name of Spouse
if Planning
to Attend

Check if
interested in
Parallel Pro-
gram on Sunday

1.

Name

Address

Phone #

2.

Name

Address

Phone #

3.

Name

Address

Phone #

bc: Richard B. Lorie
Theodore K. Broido
Edith J. Miller ✓
Rabbi Leonard A. Schoolman

MEMORANDUM

From Rabbi David A. Mersky
To Presidents, Administrators and Rabbis of Large UAHC Congregations
Copies
Subject THIRD ANNUAL LEADERSHIP CONFERENCE OF LARGE UAHC CONGREGATIONS

Date April 11, 1980

We are well on the way to what should be our most worthwhile Leadership Conference, scheduled for May 2-4, 1980 in New York. As of this date 29 congregations will be represented by 79 participants. The program has taken shape under the vigorous leadership of Richard B. Lorie, President of the Holy Blossom Temple of Toronto.

A pre-conference mailing to the actual participants will be sent out during the week of April 21st. This mailing will contain a detailed agenda as well as some "homework" for advance preparation.

The purpose of this memo is to elicit some data which we should like to collect and share at the conference. We have performed formal and informal studies in the past as they relate to the expense side of the ledger. We seek to direct our attention this time to the income side.

Please take a few minutes to complete the enclosed survey and return it by April 25, 1980. We shall collate the information and share it with the conferees and then distribute it with the post-conference mailing of the minutes. Thank you for your cooperation.

If you have any questions about this or any related matter, please don't hesitate to call.



Union of American Hebrew Congregations
838 FIFTH AVENUE, NEW YORK, N.Y. 10021 (212) 249-0100

April, 1980

SURVEY OF LARGE UAHC CONGREGATIONS

I. Name of Congregation _____
City, State _____
Your Name _____
Number of Members _____

II. What percent of gross operating expenses for your most recently concluded fiscal year derived from dues and fees? _____

III. DUES STRUCTURE

How does your congregation determine the dues of members?

Check one plan below. (Fill in appropriate categories.)

A. _____ Uniform (fixed) dues: Amount: \$ _____

B. _____ By Age Categories

1. From _____ years to _____ years: \$ _____ to \$ _____

2. From _____ years to _____ years: \$ _____ to \$ _____

3. From _____ years to _____ years: \$ _____ to \$ _____

4. From _____ years to _____ years: \$ _____ to \$ _____

C. _____ By "Family" Categories

1. Husband-Wife \$ _____ to \$ _____

2. Family with Children \$ _____ to \$ _____

3. Widow/Widower \$ _____ to \$ _____

4. Single Adults \$ _____ to \$ _____

5. Single-parent Household \$ _____ to \$ _____

6. Married Senior Citizens, Over Age _____, \$ _____ to \$ _____

7. Single Senior Citizens, Over Age _____, \$ _____ to \$ _____

8. Other (Please Describe) _____

D. _____ Fair Share (ability to pay) Plan

1. lowest income bracket \$ _____ to \$ _____, pays \$ _____ dues
2. highest income bracket, over \$ _____, pays \$ _____ dues
3. _____ dues are based on 1% of adjusted gross income
4. _____ dues are based on 1.5% of adjusted gross income
5. _____ dues are based on 2.0% of adjusted gross income
6. _____ dues are based on 2.5% of adjusted gross income
7. _____ dues are based on other: _____

E. What amount represents the average collected from each member unit?
(Total Collections/Total Membership = Average) \$ _____

F. When were dues last increased? Year _____
Amount _____
% of Increase _____

G. About how many members were granted "hardship" adjustments in the last fiscal year? _____

H. Does your congregation have a life membership program? _____

YES NO

If you answered "yes", please describe:

IV. SCHOOL FEES

YES NO

A. Do you have a separate fee for religious school? _____

If "yes", One Child \$ _____, Two \$ _____, Three \$ _____

B. Do you have a separate fee for midweek Hebrew School? _____

If "yes", One Child \$ _____, Two \$ _____, Three \$ _____

YES NO

C. Do you have a separate fee for Bar/Bat Mitzvah Training? _____

If "yes", \$ _____

D. Do you have a separate fee for Confirmation? _____

If "yes", \$ _____

E. Do you enroll non-members' children in religious school? _____

If "yes", tuition is \$ _____

F. Do you enroll non-members' children in midweek Hebrew School? _____

If "yes", tuition is \$ _____

V. CAPITAL FUNDS

A. Does the congregation have a compulsory building fund/endowment fund pledge? _____

If you answered "yes", Amount \$ _____, payable over _____ years.

B. Or, do you have a voluntary building/endowment fund pledge? _____

Average Amount \$ _____, payable over _____ years

VI. MEMBERSHIP PRIVILEGES AND FEES

To which of the following privileges is a member entitled?

High Holy Day Seats _____ No Fee _____ Fee \$ _____

Use of Sanctuary _____ " " _____ " \$ _____

Use of Chapel _____ " " _____ " \$ _____

Use of Social Hall _____ " " _____ " \$ _____

VII. Briefly describe how your congregation deals with the following items. Please include information as to whose responsibility, methods, frequency of review, where appropriate.

A. Method of Billing

B. Collection of Delinquent Accounts

C. Adjustment of Dues and Fees

VIII. ANY COMMENTS WHICH YOU WOULD LIKE TO SHARE?

bc: Edith J. Miller ✓
Rabbi Leonard A. Schoolman
Theodore K. Broido

Rabbi David A. Mersky

March 21, 1980

REGIONAL DIRECTORS

Richard B. Lorie

THIRD ANNUAL LEADERSHIP CONFERENCE OF LARGE UAHC CONGREGATIONS

Attached is a list of all of the congregations in your region who were invited to participate in the forthcoming Leadership Conference to be held in New York on May 2-4, 1980.

The list indicates (a) those who will not participate or be represented and (b) why they will not, as has been conveyed to us in our mail and phone follow-ups.

Please contact, before April 15, the congregational presidents and/or senior rabbis (that I have checked) and tell them how sorry you were to learn that they will not be represented at this important conference.

We have also indicated those congregations who will be represented and who the specific participants will be. I suggest that you communicate with them just before May 1st to let them know how pleased you were to learn that they will be at the conference and to express your hope that they will share with all of the congregations in the region, in some meaningful way, that which they learned.

After the conference, I would suggest that you be back in touch with those who actually participated to debrief them.

As we get closer to the conference we will be sending you a sample of the pre-conference mailing and other relevant information which should go out on or about April 15.

CANADIAN COUNCIL

<u>Congregation</u>	<u>Attendance</u>	<u>If "Yes", Participants:</u>	<u>If "No", Reason:</u>
Holy Blossom, Toronto	Yes	1. Richard B. Lorie, Pres. 2. Karl Bald, V.P. 3. Myer D. Brody, V.P.	
Temple Sinai, Toronto	Yes	1. Dr. Heather Morris, Pres.	



GREAT LAKES COUNCIL

<u>Congregation</u>	<u>Attendance</u>	<u>If "Yes", Participants:</u>	<u>If "No", Reason:</u>
Beth El, Chicago	No		Spoke to Sidney Rafilson, Pres. Neither he nor anyone else from congregation can attend.
Temple Sholom, Chicago	Yes	1. Donald Kaufman, V.P.	
Chicago Sinai	No		Spoke to Dr. Noah Levin. He said they were <u>not</u> a Large Congregation They have under 800 members
North Shore, Glencoe	Yes	1. Edward S. Ex, Pres.	
Israel, Minneapolis	Yes	1. David Lieberman, Pres- Elect	I spoke to Elliot Kaplan, Pres. He said Mr. Lieberman will attend. Have not received acknowledgement as yet
Emanu-El B'ne Jeshurun, Milwaukee	Yes	1. Robert W. Kohn, Pres. 2. Robert L. Hersch, V.P.	

MID-ATLANTIC COUNCIL

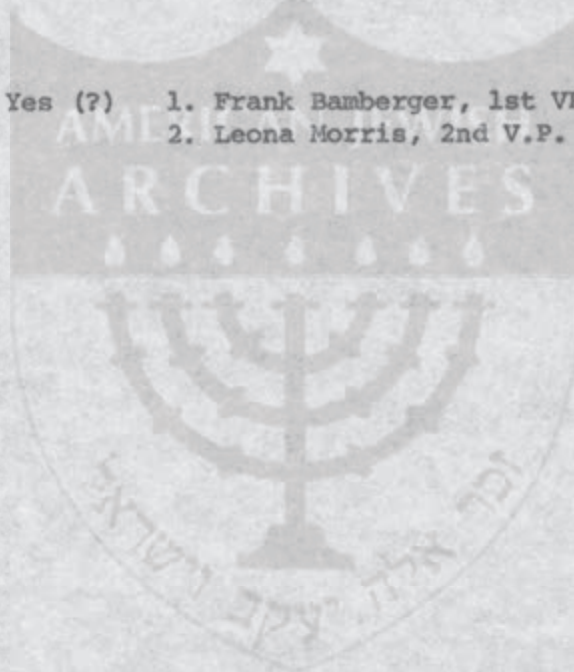
<u>Congregation</u>	<u>Attendance</u>	<u>If "Yes", Participants:</u>	<u>If "No", Reason:</u>
Washington Hebrew, DC	Yes	1. Jay W. Freedman, V.P. 2. Mrs. Harriet Kriesberg, Bd. of Directors 3. Joseph Sitrick, V.P.	

Baltimore Hebrew, MD	Yes	1. Irving F. Cohn, Pres-Elect 2. Rian M. Yaffe, 1st V.P.-Elect 3. Edward Raskin, Treasurer-Elect	
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Oheb Shalom,
Baltimore

Yes (?)	1. Frank Bamberger, 1st VP 2. Leona Morris, 2nd V.P.
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(Spoke to Marvin Schnitzer, Pres
and he said he hoped these
people will attend. Have not
received formal acknowledgement)



MIDWEST COUNCIL

<u>Congregation</u>	<u>Attendance</u>	<u>If "Yes", Participants:</u>	<u>If "No", Reason:</u>
C Emanuel, Denver			Spoke to Richard Robinson on 3/12. He said he would call later with a decision
C Indianapolis Hebrew, IN			Spoke to Jerry Litwack, Pres on 3/12. Said he didn't receive Richard Lorie memos. Sent him another set.
C The Temple, Louisville, KY	NO		Spoke to Jacques Morris, Pres. No one from congregation can attend. Would like copy of the Minutes. If he receives an answer from his officers he will let us know.
C B'nai Jehudah, Kansas City, MO			Received letter from Lorraine Stiffelman, Pres., dated 3/12 stating that since they anticipate change in top leadership they should know with- in 3 weeks who or if someone will attend. (copy letter attached)
C Israel, St. Louis, MO	NO (?)		Spoke to Paul Weil, Pres. He can't attend and his Board didn't seem interested. He will keep trying and Sanford Weissman, Adm. should get back to us.
C Shaare Emeth, St. Louis, MO	NO		Letter fr. Charles Eisenkramer, Pres. 3/5/80. (copy attached) Send Minutes.
C United Hebrew, St. Louis, MO	?		Couldn't reach Pearl Block, Pres. Called Richard Weinstein, Adm. May 2 & 3 is the 100th Anniversary of the Sisterhood. They are trying to get a vice president to participate in conference and he will let us know
C I.M. Wise, Cincinnati, OH	NO		Spoke to June Burgin, Pres. She can't come. Neither can her vice presidents
Rockdale, Cincinnati, OH	NO		Spoke to David Reichert, Pres. No one from congregation can attend.

NEW JERSEY-WEST HUDSON VALLEY COUNCIL

<u>Congregation</u>	<u>Attendance</u>	<u>If "Yes", Participants:</u>	<u>If "No", Reason:</u>
B'nai Jeshurun, Short Hills, NJ	YES	1. Harriet Perlmutter, Pres. 2. Jerry Harwood, V.P. 3. Paul Goldman, V.P.	

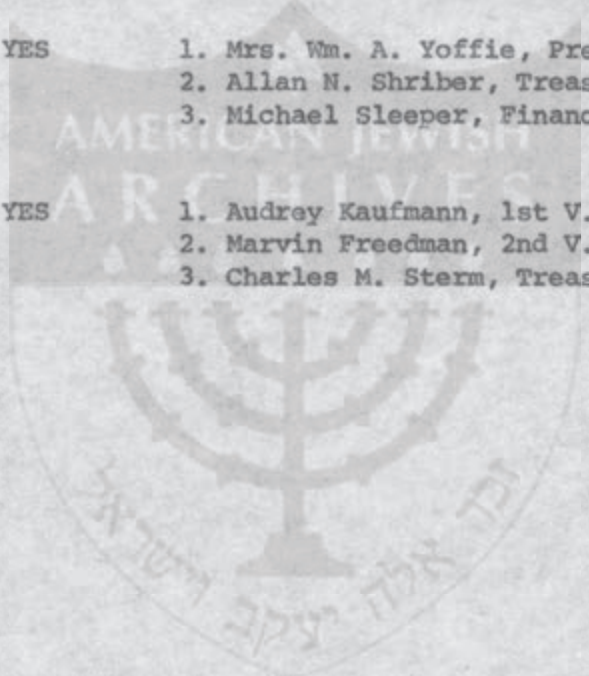


NEW YORK FEDERATION

<u>Congregation</u>	<u>Attendance</u>	<u>If "Yes", Participants:</u>	<u>If "No", Reason:</u>
Beth El, Great Neck	YES	1. Myron Pomerantz, Pres.	(He cannot attend Saturday night or Sunday. He is trying to get someone else to be present)
Israel, Lawrence	YES	1. Dr. Wm. B. Groisser, Pres. 2. Robert Levy, V.P. 3. Burton Kahn, V.P.	
Israel, New Rochelle	YES	1. Leroy Fadem, Pres. 2. Walter Bobrow, V.P. 3. Mitchell Rabbino, V.P.	
Central, New York	YES	1. John H. Ball, Pres.	(He will advise re other participants)
Emanu-El, New York	YES	1. Maxwell M. Rabb, Pres. 2. Mrs. Frederick H. Theodore 3. Mervin H. Riseman, V.P.	
Rodeph Sholom New York			Spoke to Norman Schafler. He will be out of the country. Called Jack Eisenberg, Adm. and sent him copy of Lorie memos on 3/19/80. Will advise.
Sinai, Roslyn	YES (?)	1. Raymond S. Hack, Pres.	(He said he was almost certain he would attend. He will return registration form with other participants)
JCC, White Plains	NO		Spoke to Harry Sternberg, Pres. He cannot attend. Reggie Port is trying to get delegates. He will keep trying.

NORTHEAST COUNCIL

<u>Congregation</u>	<u>Attendance</u>	<u>If "Yes", Participants:</u>	<u>If "No", Reason:</u>
Beth Israel, West Hartford, CT	YES	1. B. Theodore Jacobs, V.P.	(He is able to attend Saturday program, excluding evening portion and possibly Sunday morning)
Israel, Boston	YES	1. Justin L. Wyner, Pres.	
Emanuel, Worcester	YES	1. Mrs. Wm. A. Yoffie, Pres. 2. Allan N. Shriber, Treasurer 3. Michael Sleeper, Finance Chairman	
Beth Emeth, Albany, NY	YES	1. Audrey Kaufmann, 1st V.P. 2. Marvin Freedman, 2nd V.P. 3. Charles M. Stern, Treasurer	

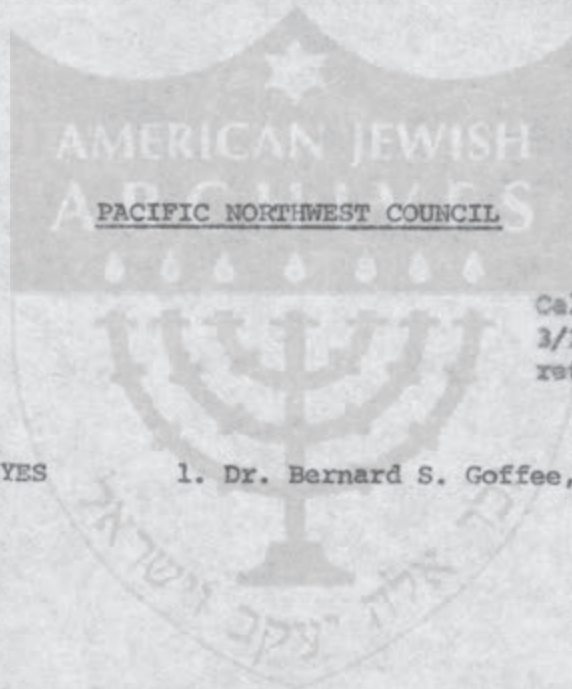


NORTHEAST LAKES COUNCIL

<u>Congregation</u>	<u>Attendance</u>	<u>If "Yes", Participants:</u>	<u>If "No", Reason:</u>
Beth El, Birmingham, MI	YES	1. Walter Shapero, Pres.	(Spoke to Mr. Shapero. He said he will attend and possibly one or two others. He will return form)
Israel, Detroit, MI			Spoke to Leslie R. Schmier, Pres. He didn't remember specifics and on 3/17 I sent Lorie memos to his office: 1100 Owendale, Suite D Troy, MI 48084
Beth Zion, Buffalo, NY	YES	1. Mrs. Joan Shatkin, Pres.	
B'rith Kodesh, Rochester, NY	YES	1. Warren H. Heilbronner, Pres. 2. Charles Chadwick, Exec. Vice Pres. 3. Lawrence S. Scott, Treasurer	
Fairmont, Cleveland	NO		Neither he nor anyone else from congregation can attend, he being Irving Konigsberg, Pres.
The Temple, Cleveland, OH	?		Spoke to James Reich, Pres. He cannot attend. Charles Evans, Pres-elect (216) 752-1400 may attend but he is on vacation till end of March.
Israel, Columbus, OH			Called Ernest Stern, Pres. He is out of town for 2 weeks. Called Helga Eisen, Adm. She gave me Stern's Fla # (305) 686-6947 (no answer) and asked me to send copy of material for 1st V.P.
Israel, Dayton, OH	NO		Received letter from Walter Ohlmann dated Jan 24 (attached)


NORTHERN CALIFORNIA COUNCIL

<u>Congregation</u>	<u>Attendance</u>	<u>If "Yes", Participants:</u>	<u>If "No", Reason:</u>
Emanu El, San Francisco	NO		Spoke to Mrs. Nadine Rushakoff, Pres. She has been unsuccessful so far in getting representation. Will try again at next Board meeting week of Mar. 24.
Emanu-El, San Jose	NO		Received letter from Michael Cahn, Pres. (copy attached). Send Minutes.
Beth Israel, Portland, OR			Called Lloyd Rosenfeld, Pres. 3/17 & 3/20. His secretary said he would return call.
De Hirsch Sinai, Seattle, WA	YES	1. Dr. Bernard S. Goffee, Pres. after 4/15	



PACIFIC SOUTHWEST COUNCIL

<u>Congregation</u>	<u>Attendance</u>	<u>If "Yes", Participants:</u>	<u>If "No", Reasons</u>
<i>Call</i> Beth Israel, Phoenix, AZ			Could not reach Myron Rosenthal, Pres Spoke to David Silberman, Adm. He will have Mr. Rosenthal call.
<i>Call</i> Emanuel, Beverly Hills, CA	NO		Spoke to Ellsworth Roston, Pres. He is not much for conferences. No one else can attend
Stephen S. Wise, Los Angeles	YES	1. Mitchell Shames, Pres.	
<i>Call</i> Beth Hillel, No. Hollywood	NO		Spoke to George Friedman. He will be in Israel. No one else can attend.
<i>Call</i> Beth Israel, San Diego			per Rabbi Mersky, didn't call James Milch, Pres.
<i>Call</i> Judea, Tarzana			Called Mark Novak, Pres. 3/17 and 3/19. His secretary said he would return call.



PENNSYLVANIA COUNCIL

<u>Congregation</u>	<u>Attendance</u>	<u>If "Yes", Participants:</u>	<u>If "No", Reason:</u>
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Call
Keneseth Israel,
Elkins Park

Louis Doull, Pres. is away until end of month. I called Wm. Ferstenfeld, Adm. and he asked me to send copy of material which he will give to Mrs. Benjamin Fishbein who will be the next president. Mailed 3/18

Rodeph Shalom,
Philadelphia

YES

1. Ivan H. Gabel, V.P.

Rodef Shalom,
Pittsburgh

YES

1. Allen H. Berkman, Pres.

Mail Line Reform,
Wynnewood

YES


1. Arthur Berlin, Pres. as of 4/1/80
2. Larry Simon, 1st F.P. as of 4/1/80

SOUTHEAST COUNCIL

<u>Congregation</u>	<u>Attendance</u>	<u>If "Yes", Participants:</u>	<u>If "No", Reason:</u>
Beth El, Hollywood, FL	NO		Spoke to Milton Jacobs, Pres. May 4th is their annual meeting and he doesn't think anyone can attend.
Beth Am, Miami, FL	YES	1. Dr. William Silver, Pres 2. Al Liebert, Exec. V.P.	
Israel, Gr. Miami Miami Beach			Spoke to Peter Bermont. He can't attend but he will try to get some- one else.
Beth Sholom, Miami Beach			Called Milton Gaynor, Pres. He suggested I call Rabbi Kronish. Did so on 3/18 & 3/19. He did not return call yet.
Hebrew Benevolent, Atlanta, GA	YES (?)	1. Marvin Botnick, 1st V.P.	(Spoke to Larry Pike, Pres. He can't attend but he believes Marvin Botnick is planning on coming. He will return form.

SOUTHWEST COUNCIL

<u>Congregation</u>	<u>Attendance</u>	<u>If "Yes", Participants:</u>	<u>If "No", Reason:</u>
<i>all</i> Sinai, New Orleans, LA	NO		Spoke to Harry Blumenthal, Jr. He can't attend. Person in line for presidency has resigned and he doesn't think anyone will attend.
<i>Call</i> Israel, Memphis, TN	NO (?)		Spoke to Leo Bearman, Jr., Pres. He has cases scheduled for that time. If his cases break he will attend. He's trying to get someone else to participate.
<i>Call</i> Emanu-El, Dallas, Tx			Spoke to Lawrence Pollock, Jr., Pres. He didn't remember about conference. On 3/18 mailed set of Lorie memos to: P.O. Box 222027 Dallas, Tx 75222
<i>Call</i> Beth Israel, Houston, TX	NO		Jack Lapin, Pres. cannot attend and he doesn't know that anyone else will
<i>Call</i> Emanu El, Houston	NO		Spoke to Sanford Lack, Pres. He feels that the program is too short. He will let us know if another executive can attend.



✓ bc: Edie Miller

MEMORANDUM

From Rabbi David A. Mersky Date March 5, 1980
To Participants in 3rd Annual Leadership Conference of Large UAHC Congregations
Copies
Subject Conference of Large UAHC Congregations, May 2-4, 1980 in New York City

1. We have received your registration and look forward to seeing you in May. If you have any questions, please don't hesitate to be in touch with us directly.
2. We will be mailing a detailed agenda and materials related to the substantive portions of the conference on or about April 15.
3. Registration Fees.

As was the case last year we are charging \$75 per participant. This fee covers the direct cost of meals, transportation, and materials. If your spouse will join for any part of the conference we have broken down the fee into component parts as follows:

Friday Reception and Dinner.....	\$25
Saturday Luncheon.....	10
Saturday Reception and Dinner.....	25
Sunday Breakfast and Luncheon.....	15

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Transportation will be provided as follows:

Saturday from the Waldorf-Astoria to and from Hebrew Union College.

Saturday evening from the Waldorf to and from UAHC, 838 Fifth Ave.

Sunday from the Waldorf to Congregation Emanu-El, 1 East 65th Street.

Again, we look forward to seeing you on May 2.



a.p. Grant

CONSULTANTS
INCORPORATED

How to Work with a Committee,
and Not Only Live to Tell About it,
But Also Want to Do it Again !

What is a committee, anyway ?

I thought you would never ask ! A committee is simply a group of people who gather with some articulated common purpose. They may be appointed, elected, volunteers, selected, paid, whatever, it doesn't matter how they got there, they deserve to be given the full responsibility and authority of the committee's stated mandate.

What can committees do ?

Almost anything. Committees do program planning, decision making, policy setting, budgeting, long range planning, hiring - you name it and it can be done by a committee.

Please, give me a few examples of committees.

We usually think of a committee as only those groups called committees, but as a professional, you'll come in contact with all kinds of committees. We call them Boards of Directors, Advisory Boards, Task Forces, Sub-Committees, Staff Meetings, Families ... get the idea ?

I never really thought about committees in all of those terms.

Well don't worry about it, it's what happens from now on that counts.

You list a Task Force as a kind of committee. Aren't they different ?

Not really, a Task Force is a kind of a committee. It is usually understood to have a very well delineated objective & time frame, with a more common-goal oriented group of people, whereas, a committee often has a more general purpose and may have a more diverse membership. Often, a committee's mandate is as precise and concentrated as a task force, and, in such cases, there is no difference.

Which is better ?

It is not a case of "better". The Task Force concept is an easier one to employ.

So, we can forget about committees, right ?

Wrong !

Since a task force is easier to work with, then you must turn everything a committee does into very precise tasks, and simply turn your committee into the task force concept.

You know, sometimes I just don't have the time to work through a committee, I must make the decision myself.

That's a fair statement, and while there may be the rare time when an instant decision must be made, too often the "not enough time" response is just an excuse. It says that your experience with the committee process has been less than satisfactory ... After all...who told you that you know how to make a decision ? Or, who told you that your decision is any more valid than the decision of your committee ? Or, who told you that it's your decision to make ?

I'm the professional ! I'm supposed to make the decisions. It's my responsibility. People expect me to make the decisions.

Good point ! You are the professional, so be professional. Your job, as a professional, is involving people in every aspect of their world. Don't forget that the people on your committee may employ you - directly or indirectly. But even if they don't, your job is to work with the committee, not instead.

But, what if the committee makes the "wrong" decision ?

That's really it, isn't it ? We're really afraid that the committee will make a decision that we believe to be wrong ... and don't forget, if we really let them make the decision, then we may have to accept it !

That's right, so we're going to give you a method for working with a committee that has enough safeguards, enough well defined tasks, enough logic and enough direction to allow you to facilitate the decision, get excited about both the process and outcome, and sleep at night.

Are you serious ?

Definitely, watch ! Remember, each stage is important, don't assume things. We must teach members of a committee, experientially, what making a decision is all about. We're professionals (whether we get paid or not) which implies that our task is facilitating the group process in the making of a decision. We must start with fundamentals, and honestly and respectfully allow the committee members to make a decision that is their decision, an appropriate decision, and a decision that responds to the objectives of the committee, whatever the objectives are. Are you ready ?

Why not ?

The first thing is to define and delineate the task in question. Spend some time on this. Involve your group in the discussion to isolate the goals & the objectives of the task. Write the task on the blackboard (or other teaching aid) so that everyone is reminded of it. When comments go off topic, you can bring the discussion back, immediately. Now we begin to have a brainstorming session.

I've used brainstorming before, and it's not so great.

More often than not, when people say they've tried brainstorming, but didn't think it was so good, they have used brainstorming as their total decision making process. There are too many problems with that. Brainstorming only produces immediate responses based upon individual experiences. If you then try to make a decision based upon those responses, you'll find that people become "wedded" to their impulses, and the session turns into a polarized, "convince me" forum. I said, start with brainstorming in the following way. Ask the people to state every possible response to the stated task. As these are given, you write them on the blackboard. You can participate in the brainstorming too ! Let every possible response to the task be stated. Don't evaluate them ! Don't let anyone else evaluate them ! Just list them. If someone says, "That's a good idea" or "That idea is no good", jump in and say, "That's not our purpose now, let's just list them". Before you conclude this part, ask if anyone can think of any other possible response. Now, you look over the list and add any other possibilities you can think about.

On the chart, ask the committee members to write the task, on the line at the top. Then, have each person transcribe the list of possibilities that you acquired through brainstorming onto the chart in the vertical columns.

TASK : _____

POSSIBILITIES									

Now, explain what an "interest group" is.

I'd be happy to. Just tell me what it is.

An interest group is any group (or individual) that has an interest in the decision being made. Everyone who is affected by the decision is part of an interest group or may be that interest group. An individual may, in fact, be part of two or more interest groups. For example, if a decision were dealing with the use of leisure time in a specific context, a person who works might be part of the "workers" interest group, the "adult" interest group, and the "family" interest group. Please, explain interest group in the most general terms. Ask your committee to list all of the interest groups connected with the task in question. This will be an area for your help, since you'll think of more interest groups than your committee. Write the list of interest groups on the blackboard. Sometimes the visual impact of the groups will generate more groups, and that's good. Be imaginative. Everyone, from policy makers to participants, from observers to presenters may be within your interest group scope.

[illegible]

Explain to your committee that they must now evaluate each possibility in terms of each interest group. The committee will look at each interest group and prioritize the possibilities in accordance with the respective interests.

How is that done ?

You've just asked two questions. Mechanically, the answer is that we shall assign the value of "1" to the most appropriate possibility for an interest group, "2" for the second most appropriate possibility, "3" for the third, and so on, to the last possibility. (Which will have the same number as the total number of possibilities listed) Programmatically, you shall assign individuals or small groups, within your committee, to be responsible for finding out the priorities of the individual interest groups.

How do they do that ?

Rarely, will all interest groups be represented at your committee meeting. If they are, and they are represented by the interest group's spokesman, then you can have each representative spend a few moments prioritizing his/her group's interests in terms of the possibilities listed. However, since this is rarely the case, ask each group or individual, within your committee, assigned to an interest group, to visit that interest group and ask the interest group to be involved in the prioritizing of possibilities for itself. This may take some time, but it's time well spent. The job for each of your committee members is clear, "Get to know your assigned interest group, get the interest group involved in prioritizing the possibilities, and come to the next meeting with your list of priorities." Set a date, time & place for your next meeting and adjourn this one.

How much time did that take ?

Not much. It really moves quite quickly, and people get "caught up" in the pace. But don't worry, the world will not come to an end if a committee meeting doesn't take "forever".

Let's pause for a moment and review what's happened. You've met with a committee, isolated a specific task, involved your committee members in every aspect of the decision, given them real jobs, and acted as a facilitator in the true sense of the word. Your committee members have left their meeting feeling, perhaps for the first time, that they're not a "rubber stamp", and that feeling is warranted since they aren't. Neither you, nor any committee member knows the outcome of this process, the decision will be real, and more important than that, the decision will have been arrived at by the committee. It's rather exciting, and if that's what you're feeling at this point, that's good, because that's how I feel everytime I reach this point in committee work.

(MUSICAL INTERLUDE)

Welcome back to our next meeting. It's good to see you. At this meeting, your committee members should arrive to see the chart with the task, possibilities and interest groups listed on the blackboard. (or any other teaching aid. I use a projected transparency, but I project it onto a blackboard so that I can write on the chart, erase if I have to, or do any other calculations) Immediately review the task. Even though they all know it, and have done their homework, your committee members are busy people, a quick review to refresh the memory is good.

Ask the representative of each interest group to relate that group's priorities and as this is done, you transcribe the numbers onto the master chart along the horizontal lines. Do this in turn, for each interest group without making comment or value judgments.

When you have completed the listing of priorities (by number), add up the vertical columns and put the total at the bottom. This reflects the total for each possibility in terms of all the interest groups.

Now, make a list of the possibilities in order of their "appropriateness" as solutions to the task. Remember that since we assigned the value of "1" to the most appropriate, and so on, the possibility that should appear at the top of your new list should have the smallest total. Your committee will begin to

react. When the entire list is on the board, read it to everyone. You can make the statement, "According to the priorities of the interest groups, the most appropriate solution to our task is ... " and let the people live with that, for a moment, or two. If the totals of your top few possibilities are extremely close, then you can present the committee with a few, "most appropriate" solutions. If, in fact, they are truly close, then a few other factors can be taken into consideration. First, are there any other outstanding factors, such as prior commitments, calendar problems, budgetary concerns, etc. that de facto select or reject one solution? If there are, we must be bound by those commitments, but remember, before you make any further commitments, use this committee process to establish where commitments should be made. Second, "Is any of the top priorities, a very low priority for one or more interest group?" Remember, the purpose is to accommodate the interest groups, so that we must qualitatively evaluate our results as well. If one solution excludes an interest group it may not be optimum. In the absence of the above conditions, perhaps the choice should be made by re-applying the chart with only those possibilities that were similar in their results and shown to be most appropriate. This can be done, on the scene, since your committee members are now advocates for the specific interest groups.

When the most appropriate solution is isolated, spend a few seconds reviewing the process, emphasizing that this was truly a committee decision, arrived at through joint efforts, and isolated rationally. This is very important.

Erase the entire blackboard and write the solution at the top. Review the task and begin to develop a clear understanding of what the decision entails. One of the best ways to do this is to develop a "Flow Chart" on the board.

What is a Flow Chart ?

It is simply a chart that, upon completion, will represent all aspects of the decision made. Start by writing the decision in the middle of the board, then ask the question, "What must we do to turn this decision into a fact?" The responses, from the committee, will be fairly quick in coming. From the central decision, ideas will "flow". Write each aspect of the decision on the board and connect it, with a line, to the written decision. You will soon see that, depending upon the specific decision, everything that is required to make

that decision a fact will appear on the Flow Chart. Here, too, you have facilitated your committee's involvement. If something is left out, add it, but let the committee do the Flow Chart development.

You can now begin to bring things together. You can go through the final decision, outlining the various aspects to it. At that point, ask the committee, "What wrong with it?" Let the committee attempt to think of all of the weak points, in their decision, plan, etc. Indicate, on your Flow Chart where the weaknesses lie, and solve them. (You know how, see the first 8 pages of this chapter)

Once the weaknesses are strengthened, ask the question, "How can we improve upon our decision?" It's a strange question, and don't let people get caught up with simple emotional outbursts, but you might capture the committee's imagination by the thought of improvements before the fact.

Go back to your Flow Chart to outline what the specific tasks are in bringing the committee decision into reality. Delegate the tasks to groups of committee members and have them, individually, make Flow Charts for their own part.

Ask each group to devise a check-list for their specific tasks. As a facilitator, you may have to assist them in transferring their task into a check-list. When the check list is complete, develop a time chart, or critical path.

With a check list and time chart, the members of the committee have a clear picture of what has to be done, and when. You can ensure that the time chart is realistic and will result in the realization of the decision at the appropriate time.

How do I know that the jobs will get done ?

You don't. However, you do know that you don't like people calling you and asking, "Have you done this yet?" So, if you don't like it, why should someone else? We can build on this. You can set up a time chart of reporting back. Don't forget yourself ! Don't "tell them", involve them. You have your time chart, now, ask, " What is a realistic time frame for the completion of each step?" "How can the person in charge of each aspect be assured that the individual

tasks are completed?" "When can each of you report back to the person responsible for your jobs?" Let the members of the committee arrive at realistic deadlines. (By the way, most committees with which you will work, will not be chaired by you. You must teach the committee chairman to go through each stage that has been described, here - the chairman's role must be as real as the committee's) When you are satisfied that the time sequences are realistic, say, " Please, call the person you are to contact, confirming that your job is done, before your specific deadline. If not, that person will have to call you, and no one likes to either chase people or be chased. Our time frame is realistic, let's do it !"

At this point, it never hurts to quickly congratulate the committee on its ability to make the decision. Stress the fact that the decision is unique to the committee, and that it was arrived at in a rational, all-involving manner. Thank them, and tell them that you look forward to seeing them next time. Before adjourning, set the dates for any required meetings before the implementation of the decision, and, since you have the step by step process documented, you can also set a time for an evaluation session.

When evaluating a decision, always evaluate it against the documented factors that went into it. That's why the process is so important, for it gives us the behaviour indicators against which we can evaluate something. It is also a great learning experience for future planning. Many of the steps through which we've gone in this chapter provide you with the framework for evaluation. If, however, your decision was one of hiring personnel, please, look at the chapter on "Evaluation & Assessment of Personnel Performance".

Okay, we've done it, so what ?

So what ? Are you kidding ? You've just worked with a committee in a manner that has placed you in the role of facilitator. You've allowed the committee to make the decision. No pre-conceived reaction was right or wrong, the committee simply responded to the most appropriate solution based on the logical and real involvement within the committee. Every member of the committee has a vested interest in the decision. You have given the committee members the

respect they deserve, and in doing so, they'll give you the respect you deserve. That's crucial - you've conducted yourself in a manner, a professional manner, that reassures your committee, whatever the mandate, that they are important, and as a result they're probably convinced that you're the right professional for them.

You know what I like about it ? Everytime I use this method it reminds me that I don't have a monopoly on ideas or decisions. Sometimes, I forget that.

Now let's review it. These are the steps in working with a committee.

1. Delineate the specific task
2. Brainstorm for possible solutions/decisions
3. Identify the Interest Groups related to the task
4. Prioritize the possibilities according to each interest group.
5. By use of the chart, isolate the most appropriate solution(s)
6. Check for external factors
7. Develop the decision through a Flow Chart
8. Look for and correct any weaknesses & make improvements.
9. Divide the Flow Chart into Tasks and delegate responsibility.
10. Develop sub-Flow Charts, Check-lists, and Time-charts
11. Ensure the time sequence for accountability
12. Carry out the decision/solution/plan
13. Evaluate what took place
14. Thank the members of the committee, and give them appropriate recognition. (see chapter on Motivation & Morale)

You've really done a good job, with your committee. Now, make certain that your committee members carry this process with them to their other committee work.

It's really not very complicated. Just let your committee do it. Have fun with it. You've just worked with a committee, and not only lived to tell about it, but also, I believe, you want to do it again.

Try it !

TASK : _____

[illegible]

MEMORANDUM

From Edith J. Miller
To Presidents of Large UAHC Congregations
Copies Conference Participants
Subject CONFERENCE OF PRESIDENTS OF LARGE UAHC CONGREGATIONS

Date May 31, 1978

The minutes of the April 2-3, 1978 Conference in Chicago are enclosed herewith. They have been edited by the Chairman of the April Conference, Richard England, and a covering memo from him is enclosed herewith.

In addition to participants, these minutes are being shared with presidents of congregations which were unable to send representatives to the meeting. Conference participants agreed that because of the delicate nature of some aspects of the discussions, it would be best to keep these minutes confidential.

For the perusal of non-participants, a copy of a memo from Rabbi David A. Mersky is enclosed. It details the materials included in kits given to Conference participants and notes the person or office to contact for copies of the materials.

Best wishes for a restful and rewarding summer.



MINUTES OF MEETING

OF



Thirty-two representatives of **twenty-eight** of the forty-seven UAHC member congregations with 1,000 or more members met in Chicago, April 2-3, 1978, to discuss common problems and concerns. A list of those attending the meeting is attached herewith as Exhibit "A." The chairperson for the Agenda Committee for the Conference, Richard England of Washington, D.C., welcomed the participants and made some introductory remarks. A memorandum from England is attached herewith as Exhibit "B."

Members of the Agenda Committee chaired the five discussion sessions on areas of particular concern to the large congregation. It is to be noted that where polls were taken on various questions the number of responses may vary according to the number of people in the room at the time of the vote. The final session of the conference will show a lesser number of votes as representatives had begun to leave the conference in order to get to their home-bound flights.

ORGANIZATION AND FUNCTIONS OF OFFICERS AND BOARDS

"E.B." Hirsch (Mrs. Allan), President of Baltimore Hebrew Congregation, spoke to the mutual problems such as staff relationships to Board, multiplicity of relationships, advantages and disadvantages of a large congregation, the seeking to create a community and sense of belonging in a heterogeneous group with differing backgrounds and commitment to Judaism. There was also discussion of ways and means of Board orientation, how organizational responsibilities are divided and how Board meetings are conducted.

Of the congregations represented there was almost equal division on the size of the Board, one-half have thirty or more on the Board and one-half have less than thirty persons on the Board. In the majority of the congregations the rabbi sits on the Board; and in two, the rabbi is entitled to vote. Rabbis are expected to report to the Board and/or Executive Committee, and Executive Directors are also expected to provide regular reports. For the purpose of these minutes, the term "Board" refers to the full Board of Trustees; "Executive Committee" means the Officers, and, in some instances, the Officers, plus additional members chosen from the Board.

The role of the Past President varies from congregation to congregation with a majority including the Past President as a voting member of the Board. A lesser number of congregations invite the Past President to sit on the Board with voice, but no vote. Nine congregations have Past Presidents on their Executive Committee. Some congregations have UAHC National or Regional Board members serve on the Board; in one instance in a non-voting, ex-officio capacity. The Constitution and By-Laws of each congregation differ on the role of the Past President, as well as term of service for presidents and officers.

Executive Directors of almost all the congregations present sit on the Board; none is entitled to vote. Similarly, seventeen Cantors are invited to Board meetings, and one has the right to a vote.

Congregational members are permitted to attend Board meetings of nine temples; sixteen do not permit such attendance. In most instances, Board sessions are not announced, but very often they follow a regular schedule and congregants are aware of meeting times. Some congregations open the meetings to non-Board members only when a very critical issue, such as a zoning problem, is to be discussed. One congregation has opened Board meetings to spouses of members with voice, but no vote, and average attendance at their meetings has increased. This system works well for them. One congregation finds that few congregants attend open Board meetings unless a specific and critical issue is on the agenda.

Three congregations represented do not have an Executive Committee, one does have an unofficial small group, which meets on a fairly regular basis. The majority have a Board plus Executive Committee. Membership on Executive Committee varies from eighteen congregations which include officers plus others, fourteen include the immediate past president, seventeen invite the senior rabbi, and of these sixteen also invite the executive director, six invite all past presidents and all committee chairpersons, seven provide for appointments to Executive by presidential discretion and eleven allow presidential discretion for some appointment to the Board.

One congregation has Associate Trustees for a one-year term, with voice, but no vote. One has Honorary Vice Presidents named to sit on the Board in recognition of previous efforts. The majority of congregations with an Executive Committee finds it serves as a processing arm, which reports to the Board.

Time allowance for meetings of the Executive and Board varied from one hour to three and a half hours. Size of the group often determines meeting time: the larger the group, the longer the session. The majority meet for less than two and a half hours per session.

Most congregations give the Associate Rabbi the right to attend Board meetings, but with no vote. Religious School Directors are invited as required.

Board terms vary as follows:

18 - one year term for presidents & officers

4 - terms of two years or longer

3 - no provision for limitation

18 - allow a second term

13 - allow a third term

5 - allow one reelection

4 - unlimited terms

Presidential terms also vary:

6 - three years

1 - a six year limit

2 - 4 years

4 - no limit

By-laws of each congregation provide specific rules for election of Boards and Officers. Eight congregations elect the Board which, in turn, elects its officers. One elects the President and Vice President with the Board electing other officers. Twenty-one congregations have a Nominating Committee appointed to select nominees for office.

By custom or law, six congregations allow for a built-in progression for presidential service. The majority have Vice Presidents sans numbers and the number of Vice Presidents varies: one congregation has none, two have seven, three have ten, and four have seven.

Additional data on Boards and Officers is available in Synagogue Research Survey #11, part of a series of surveys conducted by the National Association of Temple Administrators, in conjunction with the Commission on Synagogue Administration, available from the Commission, at 838 Fifth Avenue, New York, NY 10021. The survey was distributed at the Conference.

On the questions of establishing qualifications and criteria for Board members, one congregation indicated it tries to seek representation from people of all ages and backgrounds, and elects twenty-four members, in addition to the ex-officios. Some elect Board members on the basis of length of service and expertise, with a few individuals added because of financial support. One congregation follows the practice of asking a Board member to resign if three meetings have been missed without a valid excuse; others do not renominate non-attenders. Thirteen have orientation for new Board members in some form or fashion; eleven have a special orientation session and six temples have a Board retreat (this has been tried by many others, but has not been maintained). One congregation has an annual Board Shabbaton with workshops and discussion and one congregation has created a special manual for the Board and takes all new members of the Board on a tour of the entire temple facility. Five congregations have Board portfolios containing various informational materials for Board members.

Many of the representatives spoke of problems in securing qualified leadership for the congregation. There is often competition among congregations and charitable and communal institutions; in many instances the same people are involved, this creates a problem in areas where Federation's political-economic clout is weighted against the congregation. There is also a problem to be overcome in people's timidity and/or inability to recognize the fact that the synagogues are the life-line of Judaism and that there must be criteria for Jewish knowledge and commitment. Twenty people present indicated they wear two hats in their home communities, congregational, as well as Federation or UJA or some other communal agency. An assessment of communal priorities must be made and rather than struggle for loyalty and funds, congregations and organizations must make a conscious effort to work together.

In Houston the presidents of all congregations in the community meet on a regular basis, they have become a strong, united voice in the community and have helped the communal scene by this unity. Baltimore has created a similar instrumentality by the organization of a Conference of Presidents of Major Congregations, and presidents and directors of the communal organizations have taken note of this development.

On query as to whether congregational Board service depends on a compulsory gift to the UJA, no one responded in the affirmative. It was noted, however, that this question represents a two-sided coin -- does Federation require members to belong to a congregation?

Without lengthy discussion it was noted that the involvement of youth in congregations is important for the training of leaders and the development of congregational workers and leaders.

Minutes of Board meetings are made available in the temple office by twenty-one congregations. No concerted effort is made to share minutes with the congregation unless a specific action is to be announced. None of the congregations mails minutes to congregants; fifteen provide a summary of action; thirteen have no communication at all to other than Board members. Many place items of concern in temple bulletins.

The majority of the Boards meets monthly or eight times a year. A dozen have a charge for committee scope and activity, and three have developed a notebook for policy committees. If no action is required on a specific committee they provide written reports for the minutes, rather than an oral report. This is the policy in most congregations represented. One congregation has a Board enrichment program, which provides for discussion of one topic at each meeting to help enrich members in their knowledge of a special item of concern to either the congregation or community. Eleven congregations include a Dvar Torah by the rabbi at each meeting.

In the majority of represented congregations the process for decision-making goes from officers and/or Executive Committee to the Board. It is evident that there is a move toward more openness in our congregations. Thirteen congregations approve the budgets on recommendation of the Boards and the budgets go before the annual congregational meetings, but are not discussed line by line unless a request is made. Questions are answered, and in only one congregation is the budget shown line by line with the inclusion of salaries.

One president has a set time at the congregation and is available to staff and congregants. Many meet with staff on an ongoing basis and find that a regular luncheon or meeting session with the rabbi and/or executive director serves this purpose. In response to a question as to whether the congregation is run by the officers and Board or the staff the consensus was that the Board determines policy, and the staff implements policy.

It was agreed that demands must be made on leadership. Officers and Board members must have Jewish knowledge and commitment. They are responsible for the goals, philosophy and policy of the congregation; and must select and evaluate, monitor management and evaluate programs.

UAHC-CONGREGATIONAL RELATIONS

Harold Kuttner, President of Temple Shalom, Chicago, chaired this session. He was joined by David Lebowitz of his congregation and Rudi Scheidt of Memphis, a member of the UAHC Board and Executive Committee and Chairperson of the Union's Long Range Planning Committee.

Scheidt noted his involvement in the Reform Movement in addition to congregational activities started some seventeen years ago when he became a member of a UAHC Regional Board. He went through various offices to the national Board and through his activities has come to know the Union, congregational problems, ways and means of aiding congregations, etc. He hoped he might be able to provide counsel and assistance during the discussion of UAHC-Congregational relations.

There was an expression of interest in rabbinic salary ranges. Because some congregations were unable to obtain data from the Union, Irving Bogatin, President of Temple Israel of Memphis, conducted his own small, confidential survey among large congregations. Fifteen temples responded, ten of them represented at this Conference. Ted Broido noted that congregations themselves may be reluctant to share salary information with the UAHC, and thus the Union is unable to provide data. However, the information is at hand with the Rabbinic Pension Board, but they do not release figures, as all their information is kept confidential. It could be made available for a confidential survey. It was determined that Marvin Novick, President of Temple Beth El, Birmingham, would undertake a confidential survey, with information from the Pension Board and assistance from Ted Broido, on salary ranges, fringes, etc. by congregational size. The data available from the Bogatin survey, which might not be up-to-date as of this writing, is attached herewith as Exhibit "C."

Rudi Scheidt spoke of the Union's responsiveness to congregations and its realization of the fact that the needs of large congregations differ from smaller ones. There has been an evolution in the past ten years and the Union has noted the growing need to have groups of presidents of all sizes meet for give-and-take sessions. He emphasized the need to speak in terms of "us" rather than "you" and "we," for the Union is all of us together. He noted that in communities with a UAHC Regional Office there was a better on-going relationship created because of proximity, etc. He noted the difference between Chicago and Memphis, but he also suggested Union-congregational relations are a two-way street, and we must aid each other. Meetings such as this conference are to be encouraged.

The Union provides relocation information on new members for congregations three times a year. Each congregational president receives names of affiliated Reform Jews who have moved to his or her area. These are gathered from "nixies" to REFORM JUDAISM, the newspaper of the Reform Movement, returns with forwarding addresses are encoded and tabled by zip codes and shared with congregations. If more than one congregation exists in the area, all congregations receive the information. Names are to be used for recruitment, welcome letters, invitations to the temple, etc. Unfortunately, the cost factor is high and thus names cannot be sent more often. Should this Conference of Presidents wish to increase the frequency of this service, the Budget Committee of the UAHC would have to allocate additional funds.

In discussing the UAHC Biennial, a request was made for less programming in esoteric areas, and more nuts and bolts. It was felt there is a tendency to move into social action areas rather than the nitty-gritty of congregational life. It was recommended that the Biennial make better use of program time, have more meetings of the congregational presidents and officers. There was a consensus expressed that the 1979 program set aside time for a meeting of this Conference. It was also suggested that the presidents meet in alternate years as a group rather than at Regional Biennials. The Biennial should seek a better balance between theory and nuts and bolts, and deal with items of direct concern to our people.

The problem of lack of post-Biennial follow-up was noted. As an example, no minutes of the meeting of presidents were mailed, although a recorder was present. The group, recognizing the difficulty in followup with 740 congregations, urged that suggestions not be dropped or stopped because of lack of follow-up. One representative noted it becomes harder and harder to sell the Union to congregants because

of this lack. A Canadian representative spoke of the particular problems in so large a country and the feeling that the UAHC is not as responsive to the needs of its Canadian congregations who, therefore, feel they are not getting a fair shake.

It was suggested that the representatives tell the Union in which areas they feel it is not responsive. It is easy to say the negative. Large congregations do not ask the Union for information as often as small congregations. Some representatives noted they do get the aid they seek very often. In order to help the Union help respond to needs, more specifics should be shared.

The question of Rabbinic Placement was discussed. In response to a complaint that the UAHC hadn't been of help in a placement situation, it was noted that placement is handled by a tri-partite group of representatives of the Union, College-Institute, and CCAR. Often the Union is said not to be helpful when in fact the particular problem is not necessarily a Union concern alone. It was reiterated also that the 12% MUM dues do not go to the UAHC alone, but are dues to the Movement, with 50% going to the UAHC and 50% to the HUC-JIR.

Another complaint voiced was that Union public policy positions are not made known to congregations. They have no opportunity to voice opinions on stances in advance and there was a question as to whether UAHC positions reflect congregational feelings. It was noted that all UAHC positions are based on mandates of the Biennial, it is through this instrumentality that we obtain input from congregations, resolutions are shared with congregations via Board, Social Action Commission, Education Commission, etc.

One representative noted his congregation had sought out the Union on a number of problems and had received a good response, especially during the past two years. He felt the discussion was really dealing with minor gripes at this point and that to receive assistance large congregations must seek out the Union and share concerns.

Large congregations can also be of help by being active within the Regions. People could be involved in the work of the Union via the regional structure. Congregations could give of their membership to the Union and create new leadership. The value of affiliation increases with increased involvement.

Contact from the Union was discussed. Unfortunately, much of it is by way of paper, which is not as real as personal contact. Thus, a true feeling of communication is lacking. The direction of communication must be two-way. The Union has to be told what the congregations are doing and vice versa. The Union has to be told what we as large congregations seek and want. The specific problem of Canada was discussed again.

The activities of Rabbi Schindler in behalf of the Presidents' Conference were questioned. Do they not distract from his UAHC presidential duties? In response, a representative spoke of the great pride the Movement should have in the fact that a Reform rabbi, indeed the President of the UAHC, was selected for this top post. He felt Rabbi Schindler has done more for Reform Judaism by his activities in the wider Jewish community and that all should take pride in his efforts. Any temple or organization can have a similar situation. Others on staff pick up the gap and cover, staff works that much harder to carry out the mandates of the UAHC. He also spoke of the fine staff of the Union, which, while limited in number, and limited by budgetary stringencies, carries out the work of the Union in the face of many difficulties. Rather than express complaint, appreciation should be directed to Rabbi Schindler and the Union staff.

Rudi Scheidt suggested large congregations could be more responsive by inviting Union staff and Board members, taking time to come to know them and to learn more about the UAHC. He suggested each congregation might have a UAHC Liaison Committee to bring to the temple items of concern from the Union agenda, all resolutions and agenda items, not just social action concerns. Such a Standing Committee could give the UAHC visibility and create a better understanding and relationship. One congregation with a Liaison Committee sent forty people to the San Francisco Biennial.

It was urged that the 1979 Biennial Program Committee have representation from this Conference. Two names were suggested and have been submitted: Ed Wulfe of Houston and Dick Kaufmann of Washington.

Clarification was made that the Union or its personnel never speak for the Union except within the context of a resolution of the Board or Biennial. The Union also does not seek to represent the thinking of all Reform Jews. Its positions represent the consensus mandated by delegates to a Biennial.

In response to a query as to why personnel for UAHC Board Membership was not discussed with congregations, it was noted that a new procedure was adopted at the 1977 Biennial. Six months prior to Biennial, congregations will be circulated for names to be considered by the Nominating Committee for UAHC Board membership. This will provide an opportunity for input from congregations.

MUM was discussed at length, including the work of the Rothschild Committee, which oversees expenditures of the UAHC and the HUC-JIR, as well as the implementation of the MUM program. In response to learning there is no ceiling on dollars to MUM, a representative suggested per capita dues in order to lessen difference in dues payments of large and small congregations and short of total per capita, perhaps such a system for large congregations. Various methods of collecting 12% UAHC dues from congregants were discussed: tack-on, budgetary item, etc. One congregation with a fair share plan subvenes lower dues categories and feels some of these dues categories ought not be applied to MUM. The Union needs additional programs and costs continue to rise because of inflation and thus they would oppose a maximum. It would be preferable to have a lower percentage for 100 than for 2000, as the UAHC does not need regressive taxation.

The point was made that the congregation that does nothing new in programming doesn't find new ways to serve its members, pays less than those who do more to build program and activities. Those congregation are penalized, as it were. In a letter to one region's congregations about the dues plan most of the congregations which responded favored a per capita system. The speaker noted that in percentage figures an apparent majority of congregations are not in MUM compliance and questioned a \$60,000. surplus in the previous year's Union budget. The explanation was given that special income provided for the surplus went toward reduction of bank debts, as mandated by the 1975 Biennial. \$77,000. of indebtedness was repaid in the fiscal year ending June 30, 1977, alone.

On the question of compliance, it was noted that more and more of our congregations are in compliance, or developing programs leading them to compliance.

In response to a question on the process for congregations not in compliance, Rabbi Mersky noted terms had to be defined. Compliance at 12% does not necessarily cover the situation. The Board of the UAHC makes arrangements for sums less than 12% when the situation warrants such action for a stipulated time, and hopefully leads to compliance. Meetings and evaluations are held, and new arrangements are eventually recommended. The National MUM Committee meets quarterly. MUM assesses all funds regardless of source "applied to the annual operating expenditures of the congregation." There are guidelines for up to eighteen exclusions and some items on the expense side of the ledger are not assessable; a net base to which the percentage is applied is determined. As of July 1976, following the Dallas Biennial, the UAHC Board affirmed that any extraordinary expense not covered in the basic eighteen exclusions, such as a day school subvented by the congregation, a summer camp, etc., can be removed from the assessable base. It is the intent of MUM not to place penalties on congregations which strive for excellence but to aid them.

Failure to comply is represented by: failure to file fiscal information with MUM, failure to pay 12% or to reach an agreement on a fair share plan leading to 12%. The 1977 Biennial amended the Constitution and By-Laws so that congregations are notified if they are not in compliance. They have a right to appeal, via regional and national MUM. The Board of the UAHC can suspend services of the Reform Movement to the congregation only after appropriate hearings have been held. Even after suspension, efforts to resolve the situation continue. Where agreement is not reached, the Board of the Union can expel member congregations only after a hearing mandated by the Constitution.

Of congregations expelled all but two have reached an agreement. Two congregations have resigned, Emanu-El of Dallas and Wilshire Boulevard Temple of Los Angeles. They claim ideological differences rather than a complaint regarding the dues plan. Meetings are now in process with Emanu-El and it is hoped the situation will be resolved and that they will re-affiliate with the UAHC.

FINANCING THE CONGREGATION

Kay Lavitt (Mrs. Sol), President of Beth Israel, West Hartford, Ct., chaired this session. Her presentation covered four areas of concern: 1/ Annual Income from Members; 2/ Capital Funds; 3/ Project Development and 4/ Deferred Giving.

Many congregations face financial problems because past Boards did not secure funds for the future. Dues cannot provide for reserve funds and so most congregations require a building fund, capital giving, appeals for special projects. Endowments or Funds can be tailored to the special needs of a temple. Special honors and memorial funds involving plaques, tree of life, etc. are also set up.

Temple De Hirsch of Seattle has a "Membership in Perpetuity" program and a similar plan is being instituted at The Temple in Atlanta. The basic operations is as follows:

A member pays \$15,000 in cash or cash equivalent to a restricted endowment fund for the balance of the life of the donor and/or spouse. No further dues are paid, the \$15,000 is invested by the congregation and with, for example, an interest rate of 8%, there is income of \$1200. a year for dues, this sum often representing a higher dues payment than is common in the congregation. The donor receives a tax deduction in the year in which the gift is made. After the demise of the donor and spouse, the restricted endowment ends and the funds are placed into a general endow-

ment fund. A further advantage to this plan is the fact that donors often become prime candidates for future capital gifts.

Temple Oheb Sholom of Baltimore has a "Presidents Club" with twenty members at present, and the expectation of increased participation. All dues, membership in affiliates, admission to temple functions, and congregational greeting and memorial cards sent in behalf of the donor on request, are covered by an annual contribution of \$1,200. to this "Club."

Another congregation has created a group known as "Pillars of the Synagogue," with 166 members signed up to contribute \$1,000 or more per annum.

Of the congregations represented, thirteen are on a fair share dues plan, fifteen have a minimum dues figure, and one has dues based on seats. One congregation still has permanent family pews purchased some fifty to sixty years ago, held in perpetuity, and the families are now taxed 10% of the value each year over and above their dues. Most of the congregations with minimum dues have open seating and no pewholders.

The majority of the congregations, almost all, has a means by which hardship cases may have a hearing on a confidential basis to seek a lower dues payment. A number of congregations make special arrangements for the recently widowed, such as non-dues payment for six months, etc. If necessary, at a later date, they seek to have the widowed enter a new dues category. One congregation has a single dues plan plus a special dues category for teen-agers and a division by age (32-36, 36 and over) as well as dues for singles under age 32.

New members in most congregations are asked to pay a building fund pledge and this undoubtedly causes problems, especially when a new facility is not being contemplated. One congregation moved to charge new members a higher dues charge three years ago, geared to include building fund, and within twenty years they expect all dues schedules to merge and eventually become one dues schedule. A problem exists, however, in trying to divide the new dues funds and while they would wish to create a special fund for some portion of the monies at the moment it isn't possible, funds go to operating expenses.

Because it is difficult to justify a building fund for an older facility, congregations seek to explain past commitment and the need to have monies for replacement and repair, and seek funds to endow a special fund for this purpose. New members have to be sold on the need. If needs are not disclosed to members, they do not readily increase their giving. They must have knowledge of need and facts must be shared with the members in order to raise the level of giving.

Eight congregations refuse membership to those who do not meet dues requirements or offer enough on a fair share plan. There is an exception for hardship cases.

Temple Sholom of Chicago shared brochures on a charitable annuity gift program they have undertaken. Harold Kuttner, President, explained the plan. The donor makes a gift of \$10,000 to the Temple and receives a tax deduction in the year of the gift, based on age and life expectancy of the income beneficiary. In each year the Temple pays interest income of \$650, of which \$410 will be taxable and \$240 tax-exempt. On death of the income beneficiary, the gift may become unrestricted and be placed in a general endowment fund. It was noted this plan provides tax advantages for people in the higher brackets and should be explored for us by major donors. Copies of the brochure describing the program are available from Temple Sholom.

Many congregations have Kol Nidre and Hannukah appeals for funds to offset operating expenses. Five have a Kol Nidre appeal for Israel Bonds, eight for their own needs, and twelve have no appeals on the High Holidays.

The congregations are in the main responsive to needs of Federation, UJA, etc. Some cities cooperate in providing names of unaffiliated givers to congregations, since the UJA, Federations, etc. seek names from the congregations for possible givers. Communal make-up determines cooperation. It varies from city to city. An overriding concern was noted by delegates that congregational members give more of their time and talents to the fund-raising organizations. Six congregations undertake programs of indemnity for Israel Bond purchases, guaranteeing bank loans, etc.; seventeen do not.

Thirteen congregations noted deficit budgets for the current year; one makes up deficit from cemetery surplus, unless those funds are needed for replacement purposes.

With regard to problems with non-payers, fifteen congregations eventually suspend congregants who renege on dues payments and provide no high holiday tickets. One congregation undertook a legal action against a non-payer but the hassle of the situation was not worth the time and trouble of the situation. It was noted that eighteen years ago a responsum was requested of Rabbi Solomon B. Freehof on legal action for non-payment. His responsum has been published and for a variety of reasons, including the image of the Jewish community, Dr. Freehof felt civil courts should not be used for collection of dues or pledges. A second congregation present also noted ill-feelings within the temple which still hold from an instance where twenty to twenty-five members were sued for non-payment, all said they would pay when they could afford to do so.

Various Memorial Programs were discussed. Some temples provide for name plaques on pews, chairs, etc. Others have one or two large plaques for names to be honored. Prices vary on yahrzeit plaques -- two charge \$350 with lights, one has a \$250 charge and one \$750 with lights. Some congregations charge \$1,000 per name sans lights and \$3,000 with lights. Bricks have been sold for sanctuary walls, names for Trees of Life. One congregation sold letters in a special anniversary Torah Scroll.

No congregation present has named its total facility for a donor. Sections are named for large gifts. One congregation has been offered a large sum to name the total building, but is not certain it wishes to do so. Another congregation has been offered a large sum to build a senior center on the present parking lot but the sum would be utilized for the building and a problem would ensue in terms of maintenance. Much study has to be devoted to offers of this type, as there is much at stake, not just the name on a building.

Policies varied on charges for the use of temple facilities. Twenty-three congregations charge members for life-cycle events, seven rent to non-members and twenty-three allow non-profit communal institutions to use facilities. Nine congregations allow class room space to be used for school purposes by other groups. In some instances, this is a public service and tax status must be considered; state and county laws must also apply.

On billing procedures, fourteen congregations have computerized billing and mailing procedures; six congregations bill quarterly, nine annually and sixteen send monthly statements on unpaid balances.

RABBINICAL-CONGREGATIONAL RELATIONS

Richard Kaufmann, President of Washington Hebrew Congregation, led this discussion. He spoke of the interrelationship between rabbis when there is more than one on staff. Many questions arose concerning the distinction between junior and senior rabbi, salary levels, honorariums, communal efforts, parsonage, fringe benefits, review of rabbinic performance, contracts, retirement, etc. The majority of the temples represented have two rabbis, one has four and seven have three rabbis. In some instances the third rabbi serves as religious school director. Fifteen congregations have non-rabbinic educational directors.

Age and experience dictate functions of assistant rabbis. Some congregations feel it is their responsibility to engage newly ordained rabbis as assistants to provide learning experience and to show support of our seminary. As they develop, their talents become evident. Twelve congregations utilize assistant rabbis as youth directors. Many younger rabbis hope to be full-service rabbis but can be thrust by congregational needs into specific responsibilities. Assistant or associate rabbis often remain with a congregation for but two or three years and, in serving as educator, cause a problem of lack of educational continuity to arise.

A majority of congregations has a written or verbal agreement with rabbis and other staff personnel. Salaries were discussed and the survey made by the President of Temple Israel of Memphis is attached herewith as Exhibit "C." The survey must be seen from a geographical view as cost of living factors vary in specific areas.

The average vacation period for rabbis is four weeks per annum.

On Parsonage it was noted that the sum be reported in congregational minutes. U.S. Tax Law requires a written record and congregations should make certain to comply.

Tenure was discussed. Ted Broido indicated the Movement suggests consideration be given for rabbinic tenure if the rabbi has attained age fifty and has served the congregation for at least ten years.

Long Term Disability was also discussed. Ted Broido, in reviewing the work of the Committee on Rabbinic-Congregational Relations touched on contracts as well as long-term disability. Every congregation should have a written contract, either letter, part of minutes, or other written form, with the rabbi. This is not so much for matters of termination but because of disability and retirement. Evidence of the relationship is required and there is a danger in regard to disability when specifics are not in writing. While some rabbis may not wish to have a written contract with fiscal items, terms, etc. spelled out, there should be a written record in the congregation which spells out pension, housing allowance, term, fringe benefits.

Broido also noted the importance of bringing problems to the Rabbinic-Congregational Relations Committee at an early stage so the situation is not allowed to fester and grow to proportions which make settlement difficult.

Two of the congregations represented have a fixed policy on Sabbaticals for the rabbi, the others face the question as it arises. In the greater New York area, five smaller congregations have granted rabbinic sabbaticals during the past few years. Generally, when a rabbi has served seven to eight years, a five to six month Sabbatical is granted and usually runs from a period following the High Holidays to early Spring which allows the rabbi to work with the confirmation class.

The question of review of rabbinic performance was discussed. Policy varies in

this connection. One congregation holds an open discussion by Trustees and a small Board Committee meets with the Rabbi to review. Included are items such as relationship with congregants, relationship with staff, quality of sermons, etc. Four temples have regular evaluation and they range from the above noted to meetings three or four times a year between staff and Executive Committee, perhaps a dinner session with free and open flow of discussion. One President felt that evaluation is an ongoing process and since the rabbi and the president have almost daily contact, they can try to work things out together and have an ongoing evaluation. Other congregations discuss problems on an ad hoc basis as they may arise. A potential problem was raised in regard to evaluation with a large number of people -- details of discussion can fan out to congregation and can cause even more difficulties. Another problem must be kept in mind: strong rabbis committed to program conflict with concerns of lay leadership for fiscal responsibility. The consensus was that it is preferable for the rabbi and the president to meet regularly and have serious, open discussions which can often avoid potential problems and/or embarrassment.

Four congregations have a mandatory retirement age. Due to new laws, this may not be legal at this time and temples should be sure to conform with law.

Seven congregations permit their rabbis to perform mixed marriages. From this discussion the question of income from outside sources developed: performance of non-member life cycle functions, for example. Policy varies from the rabbi retaining such funds for his own discretionary fund, to turning over funds to a congregational discretionary fund or the general fund of the congregation. Many of the congregations who allow the rabbi to retain funds have no idea as to the amount of money involved. Twenty-one congregations allow life-cycle service to non-members, eighteen permit it for immediate families of members. It was urged that congregations discuss this and create a policy to spell out the do's and don'ts and just what is meant by "immediate family," "member," etc. Problems can be avoided by means of a written policy.

One person suggested rabbis may not be paid a proper salary if outside income is permitted and allowed to be retained.

The question of performance of life-cycle services led to outside involvement on the part of the rabbi, how much is to be permitted and for what purposes. One president felt that the more respected the rabbi the more likely is outside activity to be a fact of life. He felt that a rabbi who is respected and considered a leader is, in reality, a leader of leaders and the congregation should take pride in activities of the rabbi in the community. Rabbis are not paid by the hour, the quality of rabbinic leadership is important and one really can't tie a rabbi down to a specific number of work hours per week or to 50% congregational time and 50% communal. Other members of the staff handle many responsibilities at the temple and policy should be set down that staff members discuss leave time with the senior rabbi so coverage is always administered properly.

A balance must be created between lay leaders and rabbinic leadership, they must work in mutual respect and understanding, many areas of synagogue life are gray areas and can not be clearly set forth. A give and take, to achieve balance must attain.

One California congregation indicates it has a President's Discretionary Fund. They have done well with it and funds help to subvene Biennials and Regional meetings, this encourages leadership development. President can use funds as he sees fit and the sum in the fund is \$1000 and is replenished as required.

Ted Broido discussed pension problems. Many congregations do not keep proper track of pension program and are suddenly faced with impending retirement of rabbi only to learn they are underfunded - this happens now with rabbis approaching retirement. The new system is much more efficient so as younger rabbis reach retirement age the current problems should not continue. When a senior rabbi attains age 55-56-57, the congregation should study pension benefits and they can always receive assistance from the National Committee on Rabbinic Congregational Relations, as well as the Pension Board. There has been a problem of waiting too long and then the congregation has the burden of adjusting the funding or of having the rabbi remain beyond expected retirement age in order to create a proper pension. Pension payments exclude Social Security by law, congregations do not pay SS; and therefore, it is not figured into Pension.

MEMBERSHIP

Ellis Levine, Temple Beth El of Great Neck, New York, discussed aspects of membership which are a particular problem to the larger congregation. Membership is often restricted and there are waiting lists. The large congregation built on a life concept has to be sustained for a long period of time, families put a sizeable sum of money into the congregation and we must make sure it is worth while. Today's younger generation is very mobile, there is greater turnover in the congregation and the needs differ. Programs must be created to make the Reform congregation better than the competition, we must reach out and enrich the program with new ideas and techniques.

Often members come into a congregation via the affiliates. Northern congregations have a problem in that so many of their older, long-time members are moving south. Dues are a serious consideration and some people will seek to join a congregation which does not have a building fund. Twelve congregations present permit non-members to join affiliates. One has a special membership category for high schoolers to join the temple and very often the families also become members. Our congregations now have many widows, divorcees, single parent families and programming for the single person must be increased. A very high priority is programming for senior citizens, especially in areas with a large influx of elderly people. Some of the congregations have a special dues category for senior citizens and one congregation noted that dues from senior citizens do not cover cost of services and care must be taken to plan special new programs for younger people, or else the congregation may tend to become a congregation for the elderly.

One congregation has started a program "Whatever Happened to the Class of '65," in which they are seeking to contact graduates of their school from the years 1960-65 to determine where they are, are they married or single, etc. All are to be invited to functions at temple and will seek to bring them back into the congregation. Another president noted the appointment of a membership chairperson of thirty years of age helped to bring in new younger members. They also have a special dues plan for under-thirty's especially if they are not particularly affluent. Where higher payments are possible by younger people they seek to gain them.

Some congregations have gained active, knowledgeable committed members who first came to the synagogue as part of a couples club. Many have family services once a month or on some regular basis. One temple has dinner for families of religious school students, grade by grade, before family services. One congregation often has an early service without a sermon followed by the regular late Friday service.

One congregation has a program for young mothers one morning a week, with baby-sitting service, open to non-members, and at no cost. They conduct a lecture or study series and provide intellectual stimulation for these young women. Another has a program immediately following Sunday school session which offers ten to twelve craft, music, art, etc. courses for young women. Many students, about 100, stay for one hour each Sunday after religious school for these programs.

Five of the congregations still represented (by Monday afternoon, the group had decreased) operate more than one facility--a center city and a suburban.

The welcoming process is important to create a sense of belonging. One congregation assigns ten new families to one Board member, who is asked to serve as a liaison to bring the newcomers into the congregational community. One congregation has ten or fifteen new couples meet together with Membership Committee on a social basis to come to know each other and create an aura of friendship.

Techniques for involvement of new people are important -- invite newcomers to serve as ushers; on committees; at Oneg Shabbat, have oldtimers seek out new faces; have special hosts and hostesses on Friday evenings to give warmth and hospitality.

While this portion of the meeting had a small number of representatives still present, six noted the attendance at services by Board members was about 25%. Sixteen noted they regularly attend Friday evening or Saturday morning services, fourteen did so even before they became president.

Only three congregations participate in a Wagon program. Others have a special welcoming committee to greet new members.

Process differs from congregation to congregation in the signing up of new members. One of two congregations have the rabbi interview prospective members; one congregation has the executive director meet with them first and then the membership committee, the majority utilize a committee structure. Eighteen congregations have applications presented to the Board and they elect people to membership, three do not have Board determination on new members, seven congregations provide information on dues and pledges to the Board when members are presented. One congregation also has any resignation presented to the Board. In all instances hardship cases were kept as confidential as possible. Sixteen congregations seek information on past affiliation and financial responsibility with previous congregation.

Two congregations require prepayment of dues for first year of membership.

In Worcester, all of the congregations seek to cooperate on sharing information when members seek to change affiliate.

One congregation holds old family seats for the High Holy Days and at a specified time prior to services others are permitted to utilize. One congregation has reserved seats for members only and allows for some free tickets to the needy if seats are still open at the start of services. One congregation has its main service piped into another auditorium which is open to the public at no charge. None of the

representatives still present indicated sale of Holiday tickets in addition to dues. Eighteen congregations check tickets at the door. One tried professional ticket takers but determined not to do so again after the first experience.

Fifteen congregations have a first or second Seder. One has a second seder for the elderly unaffiliated and this has served to bring great fulfillment to the temple members who work at the seder arrangements, service, etc.

Thirteen congregations represented use Gates of Prayer, eight people noted they liked it, and seven said they were not happy with the new prayerbook.

Eight congregations have a full-time, paid youth director.

In discussing expectations of new members it was felt two priorities are fairly commonplace -- the rabbi and the religious school. It is also important to have a sense of community and involvement for new members.

Some of the congregations undertake a special theatre program, they hire a special package deal from a New York firm, Cargill, which provides scripts, a director, etc. People from the congregation are involved in staging the production, acting, costumes, etc. This not only is a good fund raising program, but it creates a stimulating atmosphere of friendship and involvement. Other congregations have bazaars, flea markets, auctions, etc. which are not just fund-raising events, but also bring involvement and a sense of participation to volunteers.

Eleven congregations still have active Brotherhoods and nine get good financial assistance for the operating budget from Sisterhood and Brotherhood. Six congregations have joint NFTS/NFTB activities.

In a number of congregations, Confirmation Class trips to Israel have been a positive factor in retaining young people and their involvement in temple. Parents usually pay for the trip but one or two congregations make either a subsidy or a loan available if there is a need. One congregation had its young people raise the funds for the class trip and a special fund was set up for needy youngsters.

One congregation noted it is undertaking an ad hoc study of volunteerism and wondered if and how other congregations used volunteers. A few do for office work, some feel members are good potential volunteers for the nursery school, one has had success with congregational volunteers in havurah programs when the expertise of members can be utilized for programs. Continuing volunteerism can be difficult, it can be excellent when you call upon volunteers for a specific project and/or program.

At the Monday luncheon session, the group discussed the possibility of future meetings of this nature and were unanimous in the expression of a need for a continuation of the process. Those present felt the meeting was helpful, that they learned a great deal and an opportunity to discuss substantive matters with others was most helpful. The size of the congregation is a common denominator and twenty-one people voted for an annual Presidents' session. It was agreed Chicago is a good central location for such meetings.

A committee was named to plan for the next Presidents' conference. John Ball will chair the agenda committee and he will be joined by E.B. Hirsch, Richard Lorie, Jim Reich and Ed Wulfe. It was suggested that Irvin Bogatin also be invited to serve on the planning committee.

###

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HECHINGER

EXHIBIT B

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TO: The Presidents of the 47 UAHC Congregations with Family Memberships of over 1,000 each.

FROM: Richard England, Vice-President of Washington Hebrew Congregation.

DATE: April 12, 1978

You folks represent 30% of all UAHC members and 36% of all UAHC income. You - or really "we" - - represent the big customers, with problems unique to our size. We found this out at the San Francisco Biennial Convention, when lack of time and preparation prevented us from doing anything to cure these problems.

In Chicago this month we did something about it. About 35 of us, representing 28 different large temples, spent two days of hard work - - 20 hours or so - - of discussion of nuts 'n bolts problems. Because I joined the others present in a great feeling of spontaneous enthusiasm for this concept, I now recommend that this become a regular, annual UAHC event. Regional meetings of all sizes of temples are no substitute because large temples' problems are so different from those of small or medium size.

The idea of this meeting came from my business, in which for years I've met with the presidents of enterprises similar in size and type to mine from all over the world. Only in face-to-face, unhurried discussion can a leader get the feel of how he/she is doing. Problems of financing, motivation and compensation of top professionals, growth, philosophy, etc. are such natural and exciting subjects to discuss. It's the best leadership and inspirational educational device I know of. I hope future leaders continue it.

EXHIBIT C

Statistical Data on Salaries

A/ Compensation to the Senior Rabbi:

<u>YEARS SINCE ORDINATION</u>	<u>CASH PAYMENT</u>	<u>INSURANCE</u>
21	\$53,500	\$ 673
25	52,000	1336
32	51,000	1200
15	45,000	584
48	43,500	675
20	43,000	400
24	41,000	1457
26	40,000	840
30	39,500	1000
20	37,500	-
12	35,780	1333
6	35,600	1300
12	34,650	-

B/ From the same report there was a salary schedule for Associate Rabbis with 5 or more years experience since ordination:

<u>YEARS SINCE ORDINATION</u>	<u>CASH PAYMENT</u>	<u>INSURANCE</u>
20	\$31,000	\$1100
5	31,100	1200
7	27,760	1218
5	25,000	584
5	18,000	1100

MINUTES OF MEETING

OF

CONFERENCE OF PRESIDENTS



Presidents and officers of 62 congregations with more than 900 members were invited to participate in the 1979 Conference. Forty-seven representatives of 33 congregations were in attendance.

The opening session of the Conference on Saturday, April 7, 1979 began with a tour of the Hebrew Union College-Jewish Institute of Religion Cincinnati campus. Delegates had an opportunity to visit the library, the American Jewish Archives, the museum and rare book room. A lovely dinner was tendered by President and Mrs. Alfred Gottschalk at their home. After greeting the delegates, Rabbi Gottschalk spoke of the HUC-JIR, its programs, its hopes and aspirations for the future. There was a question and answer period following his presentation.

The formal business sessions began on Sunday morning, April 8. John H. Ball, President of Central Synagogue of New York City, chairman of the Planning Committee for the 1979 Conference, greeted the delegates and gave a brief overview of the history of the Presidents' Conference, the program planned for the 1979 session, format and participants, and he reviewed the materials provided by the UAHC in the special kits provided for delegates.

Mr. Ball Keynoted the first session dealing with the all-important subject of Financing the Congregation. He shared with the Conference the experience of Central Synagogue and stated that the principal source of income at Central is from the sale of memberships. The other principal source of income is from an annual Yom Kippur drive which commences on Kol Nidre with an appeal by the Rabbi which is followed up over the next two weeks with five telethons in which members of the Congregation participate. Mr. Ball stated that at the 1977 meeting of the Presidents' Conference held in Chicago one of the congregations presented an idea of having a President's Club as a means for raising additional monies. He stated that Central Synagogue had adopted this idea during the past year with gratifying results. He stated that in 1977 a total of \$117,000 had been raised from 645 members during the Yom Kippur Appeal. The total membership of Central Synagogue is approximately 1100 families. In 1978 the idea of a President's Club was adopted with a minimum of \$1,000. being required for membership. In this latest campaign 70 members joined the President's Club contributing a total of \$90,000. Overall the total amount raised in 1978 was \$170,000. and the goal for the coming year is \$200,000. In brief, the idea utilized at Central is to have a short, hard-hitting campaign. The funds raised from the Yom Kippur Appeal are used to meet current needs and yet despite this apparent success the Congregation continues to operate at a deficit with the result that monies raised from the annual Kol Nidre Appeal only help to defray the shortfall required to meet current expenses.

In the main Sanctuary at Central Synagogue there are reserved seats and the location depends on the price of membership. There is a simultaneous service conducted by the rabbinic staff at a chapel in the Community House directly across from the Synagogue and here there is "open seating." Mr. Ball stated that the Board has considered open seating for the entire Synagogue but operating at a deficit, it was felt that the adoption of open seating would in all likelihood increase the deficit through a loss of revenue and thus for the time being consideration of the adoption of any such plan has been postponed. At the present time the average membership at Central runs about \$250. which includes the right to attend Sunday School without additional cost. Mr. Ball requested information from any delegate whose congregation may have changed from reserved to open seating. He said that the experience of others in this regard would be welcome.

Central Synagogue has long recognized the need for an endowment fund but its efforts in this regard have not, to date, been very effective. A letter has recently been sent out to the Congregation requesting letters of intent with respect to the Synagogue being remembered in the wills of its members. Mr. Ball pointed out that while this plan does have some benefits the dollar amounts to be realized can never be known until such time that the legacy becomes a reality.

Long Range financial planning is, of course, an urgent need of most congregations and Mr. Ball asked representatives to share their congregational experiences in developing such programs.

Rabbi David A. Mersky spoke of the need for congregations, both large and small, to look to future needs. With smaller families, our religious schools are shrinking; when building fund pledges have been fulfilled and families do not have children in religious school some leave the congregation, and both relatively and absolutely give less annually to the synagogue. He commended to the group a book published by MacMillan in 1976, "Why They Give" by Milton Goldin, a professional public relations person and fund raiser. The book gives the history of fund raising in the post World War II era, the increased giving to the United Jewish Appeal and the lower place synagogue fund raising has been relegated to among our people. The growth and development of UJA/Federation has affected synagogues in many ways, particularly fund raising. Ways and means to provide for the future of the synagogue must be found.

One of the problems is that not enough time is given to the planning and conception of the financial needs of our congregations. Three elements are involved which must be considered:

- 1/ Plans must be carefully drawn - there must be clear objectives, a coherent totality of planning by the congregation.
- 2/ People must be involved - in the planning, the process and the culmination.
- 3/ The effort must be properly managed, hard work is required by many with an assignment of responsibilities to members.

Dr. Boris O'Mansky of Baltimore Hebrew Congregation, noted his temple was undertaking a new President's Club campaign. Many past members have opted to continue membership. Their President's Club minimum gift is \$1,200 & includes dues and membership in the Club. The Central Synagogue plan is \$1,000. minimum over and above dues. Central also gives members a small token replica of the synagogue building which has recently been named a national landmark.

Mrs. Judith Yoffie of Emanu-El of Worcester makes the Kol Nidre appeal at her congregation. She asked for suggestions as to ways and means to move members up from their normal appeal response. John Ball noted the senior rabbi of Central Synagogue makes the appeal and tells of the needs and the aspirations of the congregation.

Elliott Kaplan, Temple Israel, Minneapolis, spoke of their "Pillars of the Temple" program. They had 10 people who gave \$1,000. per year, there is no special p.r. or recognition; as the program moved they reached 260 "Pillars." They have also increased dues by 10% due to the rise in cost-of-living and have eliminated all Yom Kippur appeals. They have home meetings with one or two "Pillars" meeting with about 10 prospects, this seems to work well in gaining new members as "Pillars of the Temple." They feel special recognition is not needed. There is a need to convince members that they have a responsibility to the temple. In Minneapolis the leadership of Federation and the congregation are the same. Long term large giving requires that people become convinced of the need and it takes time, work and leadership to educate people.

Ed Wulfe, Emanu El of Houston, spoke of the personal approach followed by his congregation. You can obtain better results if the effort is personal, one to one, to get the message to the membership. Emanu El rated 120/150 congregational families in terms of dues and spoke to them to up-grade their dues to what the committee felt would be proper. There was a good response. They had one \$2,000. giver and after 30 days of working with the selected families they now have 20 families paying \$2,000. dues. There is personnel in our congregations who can work; the money is there, you have to go after it.

Matthew Ross underscored the need to abandon a low key position and share the plight of the synagogue with the membership. They will respond when they are aware of and understand the fiscal problems.

Dr. William Silver, Beth Am, Miami, indicated he had received Board permission for a High Holyday appeal. He made a statement designed to inform the congregation of the needs, he spoke of the activities of the synagogue and tried to educate rather than plead. Their \$1,000. contributions are up to \$1,250. this year. They have open seating and members get little else for dues. But their Committee of 100 - large givers - has 126 people this year. The only recognition is the printing of the givers names on a letterhead or bulletin.

Richard Lorie, Holy Blossom Temple, Toronto, noted they have a fair share dues plan but there is a \$35. Religious School fee and a \$125. fee for Hebrew, all else is included in dues. They try to obtain dues based on income category and they watch the development of members in regard to age and career status. Some members are re-categorized each year. They have an active committee, representing a cross-section of the congregation, which seeks to have an ongoing evaluation of dues. Four years ago their top dues were \$840. for people in the \$50,000. annual income range, this has been moved up to \$1,500. dues for a \$75,000. annual income. They may seek to raise that figure. They have a balanced budget and open seating. If a congregant has health problems or a disability, special arrangements are made in regard to seating. The Kol Nidre Appeal is for Israel Bonds. There is no appeal from the pulpit. Their membership is 2,200 and 75/80 are at the top dues level and 200/250 at the \$1,000. level. When asked how they arrive at average income levels of congregants, Mr. Lorie indicated the community knows the history of its people, how they have been doing over the years and people know or have a good idea of the income categories and realize that they increase as the years go by. Professionals know the income levels of peers, they seek to keep the dues level moving up and they review members regularly.

Lorraine Stiffelman, B'nai Jehudah, Kansas City, noted her congregation as being similar to Holy Blossom. They have a fair share dues ranging from \$150. to \$1,000. Many pay less than \$150. and couples under 30 without children have a special dues category. Last year they raised the dues level to a range from \$200. to \$1,200. Members were asked to recertify their category to one of 8 and dues seem to average $1\frac{1}{2}\%$ to 2% of income. A Dues Advisory Committee of 4 Board members and 4 non-Board members, reviews dues on a regular basis. She noted a problem because of lower dues plans of two other local Reform congregations and B'nai Jehudah lost 45 members when they increased their dues. But they still review and seek to raise dues levels. Each family is evaluated at least every 3 years.

Sinai De Hirsch, Seattle, has a plan for a \$10,000. onetime dues commitment, for anyone over age 55. They plan to increase the sum to \$15,000. this year. Forty-seven members have made this commitment. Should a member be widowed the spouse retains the membership. They try to get the payment within one year but if it will aid a member taxwise, arrangements can be made to pay the dues over two years. The funds are placed in an Endowment Fund and the earnings go into the temple's operating budget. They now have \$600,000. and hope to reach \$3,000,000. from this program of "Membership in Perpetuity." The Executive Director makes the initial contact and then members follow-up. They have open seating and a fair share dues program. Average dues are approximately 2% of income. They try to revise the dues schedule every second year.

Sixteen congregations represented have fair share dues. Twelve have fixed dues. The fair share plans vary from congregation to congregation and the question was posed as to how many are really fair share. Holy Blossom Temple has a number of indigent members who pay no dues or a bare minimum. Because of peer review of status not too many members are at their low figure of \$100. B'nai Jehudah of Kansas City raised almost every member by one category during their last attempt to increase dues; some members were moved up by 3 or 4 categories.

Emanu El of Houston also seeks to rate members by peers. A letter is sent to members asking them to increase dues and is followed up by personal solicitation. Not every member receives the letter requesting an increase; they try to determine those who are not paying their fair share. New members are on a schedule which is about $1\frac{1}{2}\%$ of income. They seek to zero in on members they feel can afford a higher dues level. They also feel very strongly that dues should be based on commitment to Judaism rather than a minimum or maximum fee.

Temple Israel of Minneapolis does not use the term dues, rather they urge that temple membership is a choice and people must know they have to support the congregation. Elliott Kaplan feels that no maximum dues should be set; the congregation has to tell the prospective member what it costs to belong to the temple; what it costs to run the congregation; and then concentrate efforts on gaining higher dues from people in the upper income level. He noted that they have failed in regard to the medical community of Minneapolis; they do not contribute as much as they undoubtedly are able to give.

Jerry Litwack of Indianapolis Hebrew Congregation expressed his delight concerning the important issue being discussed. He feels we must also examine ourselves, our Boards must examine themselves, we must all reaffirm our own commitment to the synagogue. His community is over-organized and members of the temple Board are not the leaders of UJA/Federation. He feels a bad selling job has been done in regard to our congregations. UJA sells every year but if one is committed to the synagogue the giving has to be greater. Giving to the synagogue must be the basis for giving for it is our commitment to Judaism and its future. We have to attack the sacred cow; we must no longer accept \$1,000. membership fees from those who make tremendous gifts to UJA; that sets a bad level of giving. We have to strive to get the highest level for the synagogue.

Matthew Ross suggested that perhaps we're not doing our job properly. When Central Synagogue of New York, of which he is a past president, required a 25% increase in dues, they determined to talk to the membership. A letter went to the entire congregation; they shared their problems and 80% of the members came to a meeting called to discuss the problem. The discussion brought suggestions such as "cut the choir," "cut the number of staff," "create larger classes," etc. OR "raise the dues by 25%." There was an overwhelming vote in favor of the increase and the members paid. If you have something good you have to sell it; people have to know the problems as well as the service they receive.

Jerry Litwack spoke of a series of luncheons and dinners held by his congregation to share problems. Participation was not 100% but 67 members came to sessions. They spoke of the things the synagogue could not do because of a lack of funds. He feels strongly that members have to be told what can't be done because of financial problems; it's not enough to tell members what you are doing; problems must be shared.

Harriet Perlmutter suggested that Synagogue and Federation have to help each other.

In Worcester, the congregations cooperate and do not accept members who have left other temples in order to pay a lower dues figure. Judith Yoffie noted the congregation's particular problem of a rabbi emeritus who never took an annual increase and never asked for a raise. The younger rabbis come in making a much larger salary than the older rabbi and this creates a problem for the congregation which must re-budget for the future.

Buffalo, New York, according to Joan Shatkin of Beth Zion, has a major problem with Federation. The JCC is accepting Bar/Bat Mitzvah to be held at their facilities. The dues to the Center are \$220. per year, less than synagogue affiliation. With an attempt to have life cycle events at the Y on a "do your own thing" basis without the services of a rabbi, people are tempted to move functions from the synagogue to the Y. (NOTE: This situation was resolved shortly after the meeting in Cincinnati. No life cycle functions will be undertaken by the JCC of Buffalo.)

Bob Kohn, Emanu-El B'ne Jeshurun, spoke of a similar situation in Milwaukee. The JCC which is part of Federation is strong. The community has 25,000 Jews and raises 8 million per year. But the Milwaukee congregations are still a community force. The JCC wanted to hold High Holyday Services. The project never got off the ground. The community has its own Synagogue Council comprised of presidents of all the congregations. They are a strong group and they put an end to this suggestion. They have also now defined the parameters of Federation and congregations. The "do your own thing" life cycle functions have to be stopped, otherwise the community will lose control and the rabbis will lose the commitment of the community. Those who can pay higher dues must. His congregation just increased dues from \$750. to \$1,000. on a \$75,000. income. They have a Dues Revision Committee with 25/30 members serving, a cross section of the congregation. Members are evaluated every two years. Last year the dues of 400 units were increased for a sum of \$68,000. Evaluations are made; a letter goes to the member noting new dues will be X amount. Personal contact is made for all whose dues are over \$100. An appeal committee of three is available if requested. They have no religious school tuition, very few extra fees in congregation which feels it is a service congregation. They use resources of Federation, people as well as the agency, and seek to cooperate. They joined in sponsoring a seminar on "Loss, Death and Dying." Three hundred people registered. This kind of program helps to sell the synagogue.

Ted Broido suggested that involvement in temple makes for better dues paying members. If they are close to the congregation and understand the needs, they pay their fair share.

Karl Bald noted that Holy Blossom Temple offers special services to members, life cycle events, including funerals in the temple, are part of membership contribution.

In response to a question regarding obsolescence and replacement funds, Myron Pomerantz of Beth El, Great Neck, noted his congregation has a fixed fund in the budget for replacements. The money is set apart from other funds.

Dr. Robert Hess of North Shore Congregation Israel, Glencoe, Illinois, regretted that his congregation had not made such a provision. They had to create a fund for a special need and it was not part of the operating budget.

Oheb Shalom of Baltimore, per Marvin Schnitzer, has a fund set aside for such replacements.

Bob Kohn's congregation had a program to fund capital improvements, 2 times dues paid is to be paid by each member over a 5 year period for an Endowment Fund for replacement and repair. This includes office equipment. They were unable to get the Fund started on their own, they had to seek outside assistance.

Mervin Riseman of Congregation Emanu-El, New York, described their \$5 million fund. Fifty percent has been collected or pledged and a paid professional was engaged for the program. The prospective giver is approached by the senior rabbi and a layperson. Next year marks the Golden Jubilee of their building's dedication; they are tying this event into the Endowment program and hope to gain large contributions. The congregation tries to keep dues low and they sell Holyday seats.

Walter Ohlmann, Temple Israel, Dayton, inquired about expelling of delinquent members. His congregation had to expel three members and he wondered about the experience of others.

About five years ago, per Marvin Novick, Beth El of Birmingham, Michigan had some 30/35 delinquent members. When payment wasn't received after two letters the Board voted suspension with 30 days' notice. Five members had to be suspended.

Emanu El of Houston has a Board resolution to stand behind and support dues equalization in support of the Dues Committee. If the need is real and a member can't increase dues they are retained. When it is felt the member can but will not pay proper dues they are subject to suspension.

In this connection, Warren Heilbronner of B'rith Kodesh of Rochester, New York, spoke of the problems they have with many older members moving south to warmer climes. He asked what is expected in regard to their continued support and retention.

Leroy Fadem of Temple Israel, New Rochelle indicated they have non-resident members at 50% dues. Baltimore Hebrew Congregation has a waiting list and must control membership; they retain non-residents on mailing list if some contribution is made. B'nai Jeshurun, Short Hills, N.J. has \$100. non-resident dues and Emanu El B'ne Jeshurun of Milwaukee charges 50% of dues if members are in a retirement community. Beith Zion, Buffalo, has the same policy and Temple Israel of Dayton terms them "cemetery members," retained because of cemetery rights.

The question was posed as to what constitutes a delinquent member and how they are to be treated. Dr. Leonard Goddy's congregation merged and is now Adath Israel-B'rith Sholom of Louisville. Some members resigned after merger because of dues increase and building fund. Their By-Laws define delinquent members as being in arrears for more than six months. They bill quarterly on annual dues so a family could be six quarters in arrears before the By-Laws are invoked. A letter is sent noting impending suspension. Family can continue to attend Shabbat services but no life cycle functions will be performed. They have held firm on this and raised dues of 940 families; approximately 80 letters came in pleading for adjustments which were made. The congregation has open seating and when available delinquents are given balcony seats for the High Holydays.

Harold Kuttner, Temple Sholom of Chicago, inquired as to any legal action taken against non-paying members. Rabbi Mersky noted that very little can be done except in a community like Worcester which has a history of cooperation and an instrumentality to serve the best interest of the community.

In response to a query as to temple membership as a requirement for membership in affiliates, Bob Kohn noted they require temple membership for affiliation with Sisterhood or Brotherhood. He noted they have a singles program with some 300 people between the ages 20-32 and the assistant rabbi works with them. They are a group which serves the community, dues are not required and non-temple members are affiliated. However, some weddings have taken place among group members and many

of these couples have joined the congregation. The group sponsors a Seder and what began as a social organization is now a mini-adult Jewish education program and as the group grows it benefits the community. They also have a group for senior citizens. He indicated that the Milwaukee Synagogue Council is a great boon in regard to membership when people are delinquent, move to another area of the city, etc. The cooperation aids all of the congregations.

At Great Neck's Beth El one need not be a temple member to join an affiliate but office in the affiliate is only open to dual members. This policy makes for an open door for congregational membership. They also have a Nursery School which has become a membership vehicle.

There was a question as to how the congregation's budgets are presented and adopted. Does the entire congregation receive the budget, how much time is spent in study and discussion of the budget?

Some 60 hours are devoted to the budget at Emanu El of Houston. The officers and a few selected members with expertise in finance meet 6 to 10 times. The budget is prepared on the basis of the previous year with necessary additions and cuts. When complete, it goes to the Board for study and approval and ultimately to the entire congregation.

In past years Baltimore Hebrew Congregation depended on the Executive Director to prepare the budget. Now their Budget Committee takes a more active role; small sub committees meet with temple groups and all of the pieces are put together by the Budget Committee. When there is controversy over a program the committee involved comes before the Budget Committee to discuss. They try to leave unsettled controversial matters for the Board but the Executive Committee reviews the budget first; in recent years they have devoted two full meetings to this discussion.

Moving back to the discussion of membership, Baltimore Hebrew Congregation noted they have non-members in auxiliaries but they cannot rise to the presidency of the affiliate. The community has a Council of Presidents of Synagogues, representatives of 4 Reform, 3 Conservative and 4 Orthodox congregations are involved and at least 3 or 4 come to each meeting. They have an exchange agreement in regard to temple membership and anyone delinquent in dues payments to a congregation will not be accepted as a member of another congregation. The group has been important in the community in regard to Synagogue-Federation relations, especially in regard to life-cycle events and competition between nursery schools and kindergartens. It was also reiterated that the congregation has an on-going dues evaluation program and they seek to involve members in trying to develop proper levels of giving.

Representatives were asked to share ideas about special fund-raising events. Emanu El of Houston had a special Israel Exposition which raised \$40,000. Temple Israel of Lawrence has a Bazaar and an annual Dinner Dance Journal which raises money from ads. Such functions help to make up the difference when budget projections are in error and dues do not bring in sufficient funds. Special events income helps to fill the gap.

Temple Israel, Minneapolis, has found that parlor meetings are good but it is necessary to share information on what is being done with the young people of the congregation. Sometimes slide films of youth activities are shown; they seek to share what the temple means to the youth and how it brings fulfillment to many of them. By such sharing with parents and elders, visually and personally, many questions are eliminated. It is in reality an educational tool and the kids help sell their parents and grandparents. The congregation has a year-round camp which is most beneficial in creative programming for its young people.

Questions were posed about adding the 12% MUM dues directly on the dues bill as a tack-on and what if any special treatment is given widows in regard to dues.

Fairmount Temple noted that 1/3 of its membership is in the widowed category. Adath Israel-B'rith Sholom of Louisville used to give special consideration to widows. They have found they need not be bound to this practice since the women's liberation movement. They do hold back on billing recent widows but do not change the rate. Many widows can and do pay full dues. Others noted the membership committee is available for appeal by all, not just widows, for all exceptional cases. Many congregations have age categories for dues and when a family faces a problem it is dealt with on an individual level.

Beth Zion of Buffalo has three committees seeking to raise funds. They have tried concerts, etc. but people with season tickets don't support the temple program. They even tried to get a date with tv personality Phil Donahue for fund raising purposes but had to gain approval for fee involved and because of time lapse they lost the date.

Indianapolis Hebrew Congregation had its 3rd Annual Jewish Food Festival this year. The project involves the entire congregation, including inactive people who have come back because of this effort and they have become reinvolved. They have food booths, a theatrical production, special events. Monies are raised and the income is put into the budget for the following year. Involvement is a bonus, the program brings people back and creates an arena for involvement. The Festival is open to the entire community, church groups attend, many tour groups come, some 6000 people attended.

Beth Emeth of Albany's president, Ed Bookstein, asked about securing investments. He noted they had moved their Endowment Fund from one Bank to three Funds in trust in three banks. Baltimore Hebrew Congregation has outside consultants on Funds and are doing much better in terms of income results. Temple Sholom, Chicago, has a committee of bankers - 8 brokers and 2 counsellors - which meets once a month with the Executive Board. They manage the Endowment Fund portfolio of two million dollars. They have had a larger Fund but there has been a drop in return in the last 2 years.

In wrapping-up the session, Rabbi Mersky spoke of the many threads which wove through the discussion regarding present or long range needs and the major concern with annual operating needs. There must be activity and involvement on the long range problems. There must be coordination of ongoing efforts, major gifts are important, dues are important, the efforts must be coordinated and integrated, it is crucial for the future well being of our congregations. Deferred giving must be part of our

program. Life memberships which provide tax relief for large givers and which produce high earnings must be instituted. He suggested there is importance in sharing common problems and aspirations; he felt a group might be convened to work on guidelines for these programs and especially to deal with some of the tricky questions. He suggested the possibility of working with Dr. Aryeh Nesher of UJA who is a very effective solicitor, a problem solver who deals with the question of psychological poverty in our community, one who might help our larger congregations in the area of finances and fund raising. It was noted that one congregation undertook a very simple and beautiful program which will give them well over \$350,000 proceeds free and clear. They are creating a Torah for their 100th Anniversary, letters are purchased by members at \$1.00 per letter. The culmination will be a Torah of special meaning and a large financial boon.

Matthew H. Ross, Chairman of the Board of Trustees of the UAHC, spoke on the theme, UAHC-CONGREGATIONAL RELATIONS. He noted that from his observations as he travels to congregations across the country he is encouraged; he is confident the synagogue is in the hands of dedicated, concerned people. He firmly believes that without the synagogue there can be no secular leaders, only the synagogue can create and provide educated Jews for the future. He spoke of the manifold programs of the UAHC and the services it provides to congregations which they would not be able to create on their own. Educational materials, program data, administrative and statistical information, text books, etc. He urged those present to make use of the materials provided by the Union; they not be disregarded, they should be shared with the proper committee heads and leaders of the congregation. Regular packets are sent to rabbis, presidents and administrators. It is beneficial to every congregation to use these materials. He spoke of the new Hebrew Video Tape program which will help teach youngsters Hebrew, the program is a costly one which an individual congregation could not undertake alone. It will be a very useful tool for all congregations.

Mr. Ross spoke of the sense of movement, noting the Union speaks for the movement in government circles and to other Jewish movements and organizations. Social issues are of critical interest to us as Jews and Americans, they are dealt with under the leadership of Rabbi Alexander M. Schindler. We have a system of checks and balances. He gave as an example a resolution passed by the Social Action Commission dealing with Israel which might have been harmful had it been released to the press. Because of the check and balance system it was stopped before being made public.

He noted relations between the Union and its member-congregations have improved over the years and that the congregations and the Union are not "we" and "they," or "us" and "them," but "WE." He spoke of the work of the Committee on Constitutional Revision and Restructuring which is seeking to better organize the Union so it will better serve the congregations and the movement.

Judith Yoffie asked about congregational input in regard to membership on the Union Board. Mr. Ross outlined the make-up of the Board, with 1/2 of its membership selected by the various regions. A new process has been instituted wherein the Union contacts all congregations for suggestions for the 71 At-Large members. Consideration is given to these suggestions and while every congregation cannot have a representative on the Board it is helpful to have their input and all names submitted will be considered.

In response to Arthur Berlin of Main Line Reform Temple, Wynnewood, Pennsylvania; Mr. Ross indicated a special form is being sent to all congregations requesting information on suggested candidates for the Board. These names will also be helpful in considering personnel for committees of the Union. He noted difficulty in the past due to financial factors, for many it was difficult to participate because of monetary considerations in regard to travel and accommodations. The Constitution has been changed to allow for reimbursement when travel costs exceed \$100. and this allows for democratization in membership. The Union also changes the site of Board meetings to different areas of the country; one meeting a year is held out of New York. This also helps the process of democratization.

Leroy Fadem inquired as to fund raising expenses. What are costs for MUM and RJA, how is a split attained?

In response, David Mersky noted the direct expenses are for national staff and the MUM and RJA office. Of the budget of \$400,000., 65% is for MUM, the balance RJA, a more expensive appeal since it's on a one to one basis to more people for lesser sums. John Ball noted congregational presidents are invited to the meetings of the UAHC Budget Committee. Matt Ross noted this, too, is part of the process seeking to attain more democratic procedures. Departments submit budget requests, questions are raised by the Budget Committee, priorities are set, the process is similar to the congregational process, but possibly even with better advance preparation than the average congregation. The Board feels a fresh look is required somewhere along the line and having presidents attend the meetings helps. He reminded those present that budget equals program.

Dick Lorie was happy to learn of the Board decision to provide subventions for Board members. Bob Hess asked about materials for the development of leadership. With new people coming on Boards all the time, training sessions are required and he wondered if the Union assists in this area. Mr. Ross agreed that this is a problem on all levels, congregational, regional, national. We have an orientation program for new Trustees. There is a brochure on the services provided by the UAHC and it might be well to have a brochure to describe to new members just how the Union Board functions. He agreed there is a need for better programming for leadership development.

Ted Broido spoke of the Joint Committee on Leadership and Training of the UAHC-CCAR which held its first meeting; it is developing a program for presentation at the Toronto Biennial. Ed Wulfe noted this was discussed by the Biennial Program Committee and suggested that this group might consider such a session for presidents every year.

Matt Ross noted that many congregations in close proximity to New York hold a Board meeting at 838 Fifth Avenue, this helps to acquaint members with the Union and its staff. He also spoke of his and Rabbi Schindler's travels to congregations as well as other staff member's travel, all to present the Union to the congregations.

Bob Kohn urged that this Conference of Presidents be continued at the Biennial. Mr. Ross affirmed the convening of such a session, albeit not as lengthy or in-depth as these special meetings. He also noted it was hoped to eliminate as many outsiders (people not within the Reform Movement) as possible at the Biennial; it is hoped the sessions will be vehicles for a sharing of information to meet the needs of

the congregations and an opportunity to share with fellow Reform Jews programs, problems, and aspirations.

Dr. Alfred Gottschalk spoke of the need within the Reform movement to have people understand the sense of a Movement. The tripod leadership of the movement, the CCAR, HUC-JIR and UAHC, must their information efforts. As they have matured over the years, they have adopted a consulting process beyond the administrative to create a sense of movement and an ongoing effort has to be made to provide a sense of belonging to the movement.

Mr. Ross spoke of the responsibility of individual UAHC Board members to clusters of congregations in their home areas, they meet with them and report to the Board on concerns and interests of the congregations. This program must be enriched and the Union intends to strengthen the process. Dr. Gottschalk agreed that this would be a fine process and he also urged the creation of a Task Force on Communication to consider ways and means for the UAHC-CCAR-HUC-JIR to make known to congregations and congregants what the Reform movement is doing.

Dr. Silver asked about the Union's terms of office for Board and Officers. Mr. Ross explained that the Chairman may serve four years, two terms of two years each. Ex-Officio members and Regional presidents serve on the Board during their term of office. Regional and At-Large Board members may be elected for no more than two four year terms. The limitation of term does not apply to anyone while serving as an officer or member of the Executive Committee. There are 180 on the Board, 20 Ex-Officio, 71 At-Large members and 90 Regional representatives.

Larry Sachnowitz of Emanu El, Houston, underscored the need in the movement to communicate to the people who pay the dues. A written piece is not always the most effective means of communication; it is important to look into this critical issue.

Arthur Berlin urged that mailings be sent to vice presidents of congregations as they are the coming leadership. It was explained that this becomes expensive and we therefore depend on the "pass-along" system within the congregation so the proper people receive items of interest. Dick Lorie felt the size of the Union Board might be reduced. Mr. Ross spoke of the excellent committee work within the Union Board; details are shared with the full Board and the system works with minor exceptions. The Committees hear or see reports prior to sharing with the Board. He noted that while he personally was not adverse to a reduction in Board size, it was but a few years ago, at the behest of congregations, that the Board was enlarged. He also noted we get excellent Board representation at meetings, that there are quorum requirements. The Executive Committee, a smaller body, also gets excellent attendance.

Walter Ohlmann suggested a series of filler materials on the Union be shared with congregation for bulletins. This request will go to the proposed Communications Task Force.

Abraham Braude, Cincinnati, a member of the Board of Governors of the HUC-JIR and a past president of a large congregation, was a guest at the meeting. He expressed his delight at joining with this group. He gave a brief history of the Isaac Mayer Wise Temple of Cincinnati and invited delegates to see its historic and very beautiful building

Mr. Braude shared his great sense of fulfillment gained by his involvement as a lay leader as well as the strength the Union and the College-Institute give to one another. The Union leads the way and speaks for the movement, the HUC-JIR provides the leadership for the future and together they have built a great movement. He noted that the state of the College-Institute is very good and that the rapport between the UAHC and HUC-JIR is excellent; there is cooperation and communication. He urged delegates to impress upon their congregations the importance of the institutions and to tell congregants what the Union is and what it does. He brought to the attention of the group HUC-JIR's house organ - CHRONICLES - and urged them to have their names placed on the mailing list to receive copies. He also suggested they be shared with other congregational leaders.

Discussion ensued regarding a continuation of this Conference next year. It was suggested a meeting be held in the Spring or Fall of 1980. There will be a session in December at the Biennial. The group felt the Spring was a more salutary time to meet. A target date for the Spring of 1980 was agreed to and an agenda committee will be appointed. It was also suggested that two sets of minutes be sent to each congregation, one for the participant and/or president and one for sharing with the congregation.

In the discussion of CONGREGATION-STAFF RELATIONS, Marvin Novick, who has undertaken the Salary Survey of Congregational Professionals, gave a brief, off-the record report. His findings are as yet incomplete and additional information is required. Thus, it was felt it would be in error to include his interim report in the minutes. He did indicate that 48 out of 62 congregations contacted participated in responding to the questionnaire.

Ted Broido then discussed the overall theme of relations between staff and congregation. He noted that the survey is a very volatile subject and urged everyone to hold in complete confidence the data shared. Time is needed to complete the survey and to verify information and interpret responses. There is sometimes a variation between information shared with Marv Novick and information sent to the Pension Board. Ted urged that when the survey is complete it be shared with the professionals involved.

He referred to the work of the UAHC-CCAR National Commission on Rabbinic-Congregation Relations and the number of problems dealt with annually. A surprisingly small number of conciliations represent really difficult situations, perhaps 8 or 9 each year. When the NCRCR is called in early in the game it is often very helpful to all concerned and problems are solved. When a situation is allowed to fester within a congregation and outside help is not sought, it becomes more difficult to conciliate. Misconceptions abound, they have to be straightened out. The Commission has regional representation and usually a representative can meet with the parties quite quickly, this helps the situation. With early warning and the counsel of a regional representative of the NCRCR with no emotional involvement in the difficulty, it has been found that matters can be resolved in many instances before they become overblown and impossible to work out.

Mr. Broido spoke of the improved investment situation of the Rabbinical Pension Board. Improved income has allowed for higher retirement benefits and increased pre-retirement death benefits, now a maximum of 4 times salary as opposed to the past 3 times salary.

In connection with pensions the problem area is with rabbis of age 52/53 or over; many were serving before the plan came into effect, some when it was at 10% of salary, pre World War II, when salaries were very much lower. Pensions can't be increased but arrangements can be made by congregations to provide special funding. If the rabbi is timid and doesn't make this known until just prior to retirement a real problem exists - they might receive only 20% or 30% or 40% of salary as pension rather than 50% and a burden is placed on the congregation. For rabbis over 55 at this time there should be a review of pension benefits with an eye to bringing the benefits up during the next 9 or 10 years. With an increase to 18% participation in the Pension Plan in 1967 the problem is not great for younger rabbis and in terms of the older rabbis the problems lessens each year for most went to an 19% plan in '67.

Dick Lorie questioned the situation of the younger rabbis, say 42-45 years of age now. With inflation at a rate of 7/8% each year and the possibility of it lasting for 20/25 years the problem could remain for the future.

Ted Broido noted the Pension Board studies the problem, worries about it and cares, with a 9½% return on new money, inflation will hopefully be covered. Post-retirements is the problem and it is possible there could be overfunding.

Rian Yaffe of Baltimore Hebrew noted he is an actuary and he questioned whether the plan was equitable to individual congregations. They make contributions for a few years and then the rabbi moves on and the process starts with a new person. Perhaps a supplemental pension should be funded by the congregation to be paid only if the rabbi stays with the congregation. The rabbis should be asked to pay 3% and thus becomes a regular deduction and closes the gap. In response to the first query, it was noted that when a new rabbi comes the previous congregation had made contributions and thus the process is really not inequitable.

It was asked if a congregation should ask for a statement from the RPB when interviewing candidates. They have a right to make such a request but the RPB statement may differ from a congregational response.

Myron Pomerantz spoke on PROGRAMMING FOR THE LARGE CONGREGATION. His congregation has an outline of program activities for new members. They seek to program for the needs of their members and at the same time draw in the community. Beth El has a strong youth program and a rabbi who excels in this area. He shared a Great Neck program outline with those present and asked for their comments.

Jerry Harwood, B'nai Jeshurun, Short Hills, N.J., said his congregation's senior citizens program is so good it impinges on other temple programs; How does one deal with this problem? Mike Pomerantz spoke of Beth El's Bible Breakfasts to which men and women are invited; it is an open program for they realize people want to come to an interesting event and you can't really limit such special things to one group alone. At Fairmount Temple, Cleveland, they have a men's auxiliary for retirees, and women attend Men's Club meetings. Jack Stewart noted that they now have two women on the Men's Club Board at Cleveland's The Temple.

David Mersky suggested that Men's Clubs look into ways and means of serving senior citizens through volunteer activities, possibly providing legal and accounting services for the elderly. Baltimore Hebrew's Men's Fellowship group meets Tuesday afternoons, about 100 retirees are members; they invite women to special programs from time to time. The program is educational and they invite speakers on a wide variety of subjects. Congregations seems to have no difficulty in programing for the elderly, the serious concern is how to service the needs of post-college age people and how to attract them to the synagogue.

In Short Hills, noted Harriet Perlmutter, they had a problem because so many young people of the congregation moved into New York City. Some are now returning to their suburban community because New York as become so expensive. The congregation seeks to attract them. They have held some home meetings designed to get the younger people together; to have them develop programs of interest. However, help is needed in this critical area and a prime concern is attracting them to services.

The Young Woman's Group of Beth Zion, Buffalo, has existed for about six years. They have some single women and newly married who feel they are too young to join Sisterhood. They compete with the Young Women's Division of Federation but have done quite well. About 100 young women are involved, many become members of the temple.

Holy Blossom has a Young Peoples Congregation; many are couples but they fall into separate categories, those with children and those who are childless. Often interests differ; life styles differ.

Mike Pomerantz urged that young couples, especially as they get older, be encouraged to join Brotherhood and Sisterhood. Too often couples remain within a couples group for too long a time and as they age younger couples feel the age differences.

Ted Broido spoke of a congregation which provides an extra High Holyday seat for all single members; this allows them to bring a guest and makes for a less lonely experience.

The Singles group of Temple Sholom, Chicago, has a large mailing list and good turn out at meetings. They are moving away from the more social programs to educational programs and rap sessions with the rabbi.

Many tend to discuss singles as the younger unmarrieds. Congregations must begin to program for those persons alone in the congregations, the older singles, the widowed, divorced, etc. They fall into varying age categories and there are many single parents. These people have to be brought into the synagogue; a healthy congregation has dynamic leadership which can be found on all levels of life. Programs must be coordinated; groups have to be melded so one program can be instituted for the entire congregation when it is of interest; there should not be five groups undertaking similar programs.

Rabbi Paul Menitoff, Director of the UAHC's Mid-West Council, continued the discussion on programming. His council includes 11 States and varying communities. He spoke of the approach to program and the philosophy for programming. There are resources available through regional offices to aid congregational programming, often lay people can be used to provide interesting and good programs. The regional program is a support system to bolster the congregational programs. As Rabbi Menitoff visits regional congregations he

hears of program needs. He also sends out a questionnaire to his region to determine interests and to find out from the congregations what they feel would be effective programming sponsored by the region. He projects a very varied program covering every area of congregational life. When he meets with congregations he often conducts workshops for Boards and helps the congregations initiate program. There must be goals set and objectives for the future. The congregation requires a yardstick and must look at its own structure, size and needs. Is the program of the congregation leading in the direction in which the congregation truly seeks to go?

Rabbi Menitoff presented a Mini-University of Judaism Catalogue which might serve as a model for a congregational program. In the Council Mini-University he offers speakers from the many areas, including UAHC staff and HUC-JIR faculty. Congregations can draw on these resources as well as their own memberships. He outlined a Mid-West Council Board week-end which provided for business to be conducted on Sunday. Friday and Saturday were set aside for programming and study sessions. This particular session focussed on Rabbinic-Congregational Relations. Special panels discussed particular areas of concern --- Lay people spoke of their responsibility to the rabbi and their view of the rabbis' responsibility to the congregation. This discussion helped to sensitize people to various problem areas. A panel of rabbis, their wives and children, spoke of their problems and family issues. The third panel was on Conciliation with Ted Broido and Rabbi Randall Falk exchanging information on rabbinic conciliations. In all sessions the audience participated in the discussions.

The presidents discussed cooperation with Federations and other agencies in terms of program. An Open University might be conducted with the cooperation of a congregation and the local JCC. The temple could provide the facilities, resource people could be suggested by the JCC, and a forum series conducted on subjects of importance to the community such as The Quality of Life, Privacy in the Computer Age. Resources are available in most congregations and communities.

Ted Broido suggested we don't use our own people enough, we often go outside of the Reform movement. He noted the Mid-West Council's Mini-U utilized talent from the movement. We must seek to use our own resources; they are there for the asking.

CONGREGATIONAL MANAGEMENT was discussed by Richard Lorie and Ed Wulfe. Exhibits A and B attached hereto on Leadership Training and Long Range Planning were shared with participants. Discussion ensued based on these papers.

In response to Judith Yoffie's query as to how younger leadership can be brought into a congregation which inherits a Board, Dick Lories noted his own congregation has a 3 year Board limit and a 3 year limit for officers. They rotate and by Constitutional limitation terms cannot exceed 3 years and consecutive terms are not permitted. The Past President usually chairs the nominating committee and selects personnel. They seek to use retiring Board members and presidents of auxiliaries on the nominating committee. There are usually 8 Board seats to be filled. Congregations should review their Constitutions and if necessary ammend to provide for a limitation of terms.

Joan Shatkin asked for information on Board orientation and how it can be best handled. Is there orientation for new members only or an ongoing process for all Board members? At Holy Blossom a professional from the staff gives new Board members an orientation; senior staff and affiliate chairpersons are also included in the session. Dick Lorie noted they hope to make this procedure a more regular one than has been the case in the past. Baltimore Hebrew

Congregation invites the full Board for orientation and they approach is five-pronged. They discuss:

- 1/ The history of the Congregation
- 2/ What Leadership Means
- 3/ Financial Aspects of Congregation
- 4/ Congregational Functions and the UAHC
- 5/ Religious Aspects of Congregation

Dick Lorie cautioned that Board Orientation should not be confused with leadership training; they are not the same. When asked about attendance at his Board meetings, Dick indicated the Board meets the 4th Thursday of every month, excluding July and December; they get a 60/75% attendance.

Beth El of Great Neck also gets an excellent attendance. They traditionally hold a Board Retreat every 2 or 3 years, over a week-end, and they seek to set goals at this retreat. Getting away together provides a harmonious setting where members can get to know one another on a personal basis. Spouses are invited for it is felt their participation reinforces the program.

Dick Lorie noted Boards vary in composition. His elects past presidents as honorary life trustees on the Board and Executive Committee. They also have Wardens, people who have given long years of service on the Board but who never attained the presidency. They have a maximum of ten wardens. This group is asked to take over special fund raising projects for the congregation.

David Mersky shared the experience of Beth Emet of Evanston. They have two Boards; one involved in traditional Board concerns; management, finances, administrative matters. The second Board functions in regard to policy and program. Substantive issues in the congregation cross over between the two and there is a give and take between the two groups. Heather Morris of Sinai, Toronto, feels most congregations do not utilize past presidents properly. She suggested an Overseers Group be convened 4 times a year, past presidents plus financial experts, to look at the financial situation and suggest projects.

Bo O'Mansky urged leadership training program. There is a need and recognizing that need Baltimore Hebrew is instituting such a program. They expect it will not only develop potential leadership, but also aid congregants in understanding what the congregation is and does, to teach them what Reform Judaism is, etc. They have set a budget of \$1,000, for the program which will involve some outside experts. Bob Hess of Glencoe also urged management training and better informed Board members as regards Reform Judaism. The Glencoe Board has a 15/20 minute Dvar Torah by the rabbi at the start of each meeting.

Beverly Schiffrin of Main Line Reform, Wynnewood, noted they have a policy book for the congregation and all Board members receive a copy. Past presidents are used at Main Line Reform and they are most helpful.

Dick Lorie suggested that "failing to plan is planning to fail." Generally temples think of long range planning as financial planning, this is in error. Long range plans must also include the setting of goals and objectives, and priorities.

Mildred Ross of Central Synagogue proposed that congregations call on the resources of the UAHC. Staff members are available for help to congregations in the areas of leadership training, program planning, management assistance.

Emanu El of Houston convened 7 task forces with 30/40 people each to look into various aspects of the temple program. Following a year's study there were formal reports and recommendation which were implemented immediately when warranted. Close to 300 members learned a great deal about the congregation for involvement was created for persons not previously involved. Personnel was selected from 900 people who responded to a questionnaire sent to 1600 members. It was noted such questionnaires are to be carefully prepared for the manner in which questions are presented makes a difference in responses and the information gained can be relevant and useful for many aspects of temple life. This program brought about some immediate changes and many ideas for the future.

Of the congregations present, 14 have Planning Committees.

It was asked how you report to the congregation the end result of special surveys and questionnaires; how do you share the information gained?

Ed Wulfe noted talk is not enough. You must take action and implement suggestions. Congregants must be told what comes out of long range planning. Emanu El started a suburban Hebrew School as a result of their survey. The idea was suggested, they discussed it with the Religious School Committee and School Board; space was rented and a program initiated for the after school hours; Hebrew program registration doubled instantly. People have to know what is happening.

Ed also stressed the importance of the president and senior rabbi's relationship; they have a partnership and must be in constant communication. This benefits the congregation, the balance between president and rabbi and communication with congregation. The rabbi often knows the people, how they work, what they can be expected to do, etc. and the rabbi and president bounce names off each other - the interplay is essential.

He spoke of the importance of the Executive Committee and committees. Executive is essential in regard to management aspects. A team effort of officers plus past presidents involved, meeting 2-3 times a month, they have valuable input and insights to offer and provide assistance in a cooperative effort. Executive Committee is a sounding board; they also help select chairpersons for committees as they know the members and particular talents and/or interests. When asked if the Executive by-passes the Board, Ed noted that it does not. The Board is the responsible body and runs the temple; the Executive Committee recommends, they have little if any legal authority but are a most important arm of the congregation. His congregation sometimes names a non-Board member as a committee chairperson because of special talents and in such cases a Board member is asked to co-chair. You have to reach out to your membership in this manner. The chemistry of the Board is critical. The Emanu El Board has 30 members plus past presidents.

In response to Lorraine Stiffelman's inquiry as to the presence of the senior rabbi and executive director attending Board meetings, the majority agreed they should be at meetings.

Bo O'Mansky noted similar components on Baltimore Hebrew's Board with exception of past presidents. He finds the Executive Committee to be helpful for an airing of problems prior to presentation to the full Board. Committees report to the Executive Committee and then in writing to Board; the Executive reviews, it makes no decisions, that is the responsibility of the Board.

Ed Wulfe feels the Executive Committee is an important instrument to help sell ideas to the Board.

The importance of congregational committees for the development of potential leaders was stressed. Mike Pomerantz described Beth El's non-voting Associate Trustees. They are recommended to president; attend meetings of Board and are invited on a year-to-year basis. The congregation now has 10 such Associates; many eventually serve as elected, voting Board members.

The Temple in Atlanta holds open Board meetings. Problems to be discussed are held for the end of the meeting when non-members are asked to leave. It was also noted members of the professional staff attend the Board meeting but are excused when professional salaries are to be discussed.

Time of Board meetings vary, but most felt it best to hold them at a set time on a regular basis to provide for advance scheduling. Some congregation honor a member at the Annual Meeting of the Congregation in order to create interest and a good attendance. Gimmicks have to be used to interest members; one temple has a Sunday night dessert buffet; another gives certificates of recognition. Some congregations invite students from junior and senior high to participate on committees, this brings involvement of youngsters in temple life and helps to develop leadership. In many congregation the youth group president sits on the Board.

Ed Wulfe reiterated the need to use members to get things done at temple; create a sense of involvement. One person, the president, can't do everything alone, it is necessary to know your members, see that they serve on committees; find out their interests; screen them and assign them to committees or special tasks. GET THEM INVOLVED. His congregation considers Thursday night as "Temple Committee Night." Leonard Abel of Washington Hebrew Congregation asked if any congregations have a committee to evaluate the functions of professional leadership. Ed Wulfe suggested this is part of the budget process in most congregations. Mr. Abel noted his congregation had evaluated the professional staff this year, all areas other than compensation, office responsibilities, integrity of the individual, etc. Two members of the Executive Committee and one congregational member were involved in the evaluation. A reluctance on the part of rabbis to be evaluated was noted; this, it was felt, is a dis-service to the institution and the person.

Ed Wulfe described his congregation's budget process which in the first instance is discussed by the Executive Committee. They review and recommend, this year it was a provision for a 7% increase. Priorities are set, various components of the budget are studied, some are decreased, some increased, some remain the same. There are 8 or 9 meetings and sometimes non- Executive Committee members are invited to meeting. The leadership meets with every member of the professional staff at least once a year for a rap session. They discuss concerns, problems, objectives, etc in an open and frank manner.

It was felt that issues can be cleared early if professionals are evaluated, pro and con aspects can be discussed. After such discussion the president or chairperson of committee meets with professional to review responsibilities and work patterns. Economic evaluations are not included in this process.

Notice to professionals being terminated varies in congregations; some terminate following a review procedure. In many congregations the president will discuss any criticism with rabbi or other professionals. It was felt that constructive criticism can benefit all but that the process need not be annual; it should be ongoing and constructive. Leaders work with professionals on a very close basis and that provides for an ongoing view of manner in which professional handles people, responsibilities, etc.

WRAP-UP: The Chairman of the meeting was requested by a unanimous vote of the participants to direct that the recorder include in the minutes of the meeting the following statement: The gratitude and appreciation of the Conference is extended to Edie Miller, Rabbi David Mersky and Theodore Broido of the UAHC for their unstinting and tireless efforts in both arranging for the meeting, assisting in the preparation of the agenda, preparing the study materials for distribution and for their invaluable input during the course of the discussions; without their efforts this meeting would never have been possible and to each of them, we the members of the Presidents' Conference express our sincerest thanks!

John Ball advised that there would be a meeting of presidents of large congregations at the Toronto Biennial, December 7-11, 1980. Volunteers were requested for the agenda committee for a Spring, 1980 session and appointments will be made at a later date.

Agenda items for the 1980 meeting included the following suggestions: budget; personnel; synagogue-federation relations; roots of Reform Judaism study session; parameters of Reform Judaism and the philosophical changes in congregations; education; synagogue priorities in Judaism.

It was urged that there be advance sharing by presidents of special and exciting programs, how they were planned, the kick-off, the program, the results. If there are some very special programs, 3 or 4 presidents should be asked to discuss them fully. A session on leadership training for the group was urged, with a panel of experts. Also suggested were a session on dues, how to move from fixed to fair share; guidelines for budget divisions. A request was made for materials from congregations, perhaps even sample budgets with names and designations removed; responsibility of inner-city temples to city and neighborhoods.

The group requested the participation by more UAHC staff members and expressed the hope that Rabbi Schindler and Al Vorspan participate. New York City was suggested as the site of the 1980 meeting, with the desire to meet at the UAHC House of Living Judaism and the new HUC-JIR New York campus.

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LEADERSHIP TRAINING

1. Select competent professional leader. If a member of the congregation, he should be engaged in this type of profession. If such a lay person is not available, then it is worth while to pay for such professional leadership.
 2. Carefully select the lay people who should gain most from the leadership training seminar or course. These people should be drawn from the Temple Board and the boards of auxilliary organizations.
 3. The seminar should be a study in depth on inter-personal relationships, organization, planning, etc., and should also be directed towards the expectations and relationships between lay leadership and senior Temple staff -- this is most important. Those attending the seminar should be made aware of how groups work and the means of maximizing group efforts to reach decisions in committees.
- Another very important area is to help teach chairmen and aspiring committee leaders how best to run meetings to

maximize the efforts of all attending.

An important aspect of leadership training is also to be sure to recruit young people and employ them meaningfully in the workings of the Temple so as to give them a sense of accomplishment and achievement which would stem from their involvement.

These young people should then be encouraged to continue through the leadership process as far as their abilities and capabilities will allow them.

They should be incorporated into the committee structure, given definite tasks to perform and those who perform best would then be elevated to co-chairmen -- chairmen -- Temple Officer and on to the Presidency.

* Material is available from U.A.H.C. upon request.

LONG RANGE PLANNING COMMITTEE

1. Set goals and specify objectives desired.
2. Have a professional (either lay or paid) to draw up a questionnaire to be circulated to the congregation asking them their opinion on present programs and perceived needs.

Professional evaluation should then be applied to the answers.

Involve as many congregants as possible to give a proper spin-off. If people are genuinely concerned and involved in the process and eventually perceive changes along the lines desired, this will have a very positive effect on the support for any changes which are implemented.

3. Select a suitable chairman, preferably one who does long range planning as part of his profession, senior officers of Temple and auxiliaries, department chairmen and senior staff. This would make up the composition of the committee.

4. The task of the committee would be to examine "How did we get here?, Where do we go?, and How do we do it?" and, of course, to use the results from the questionnaire as part of the process.

In going through the long range planning process the emphasis should be off dollars as in the past too much long range planning was really a projected five year budget not concerned with programs, etc.

The Long Range Planning Committee should examine the present structure, concentrate on ideas of future needs and prepare various models showing how best to apply human and financial resources to achieve the desired goals.

Physical plant and equipment must also be looked at in light of the desired goals.

A very important aspect of this committee is to ensure the continuity of those first selected for the life of the committee and that senior professional staff input is sought and used.

3.

It is essential to set dead lines for the completion and adoption of this planning process. Regular reports from the Long Range Planning Committee should be made to the Executive Committee and the Board and, if possible, implementation of suggested changes should take place as and when these are agreed to.



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