The URJ Rabbinic Transition Roadmap

Module 4: Saying Hello

Contents

Saying Hello: An Introduction

Highlights of Saying Hello

Characteristics of the Saying Hello Stage

Best Principles for Managing Transition in the Saying Hello Stage

Exercises and Resources for the Saying Hello Stage

Engagement Exercise: Saying Hello through History Day

Exercise: Entering the Promised Land Isn't Easy

Text Study: Torah Texts

Discussion Guide: Case Studies on Saying Hello

Three Case Studies on Saying Hello
Contributors

Union for Reform Judaism Staff Contributors

Amy Asin, Vice President, Strengthening Congregations
Rabbi Paula Feldstein, Manager, Transition Support
Rabbi David Fine, Director, Consulting and Transition Management
Rabbi Janet Offel, Director, Consulting and Transition Management

Other Contributors

Michelle Lynn-Sachs, Consultant
Rabbi Laura Novak Winer, RJE, Consultant
Rabbi Deborah Prinz, Former Director of Program and Member Services, Central Conference of American Rabbis

Editorial Team

Helayne Friedland, Production Manager, Union for Reform Judaism
Michael H. Goldberg, Director of Operations, Strengthening Congregations, Union for Reform Judaism
Julia Knobloch, Production Manager, Strengthening Congregations, Union for Reform Judaism
Daphne Macy, Communications Manager, Strengthening Congregations, Union for Reform Judaism
Robin Riegelhaupt, Resources Manager, Strengthening Congregations, Union for Reform Judaism
Welcome to the Journey of Rabbinic Transition

The journey of rabbinic transition begins before the search for a new, settled rabbi. It begins the moment when a congregation learns that their current rabbi will be departing. It is a journey that challenges everyone involved to be mindful and respectful of the broad range of individual emotions and feelings generated by the departure of one settled rabbi and the welcoming of a new settled rabbi.

The URJ has developed this four-module Rabbinic Transition Roadmap to help congregational leadership guide their congregations on this journey. It is highly recommended that you begin with Module 1—“Understanding Transition”—no matter where you are on the path. It sets the stage and builds a foundation for the successful management of the transition process. After that, each module can be used independently and can even overlap based on the congregation’s transition timetable.

Realizing that in today’s world “the only constant is change,” perhaps the most enduring value of this resource is that once you have learned and applied the key principles of transition management to your rabbinic process, you will be able to apply them to many other change processes that you undertake as a community, from that of other staff or leadership to anticipated programmatic changes. As experimentation and change processes become more crucial to the success of congregations in the 21st century, we hope that the value of this resource will expand to meet your needs well beyond this immediate journey of rabbinic transition.

May Adonai bless you and your congregation on this journey, and on your journeys yet to come.
The URJ Rabbinic Transition Roadmap

Module 4: Saying Hello

An Introduction

The URJ Rabbinic Transition Roadmap is a self-guided resource for congregations who are in the process of planning for the departure of their current rabbi and the welcome of their next rabbi.

This resource is divided into four modules. Module 1 focuses on understanding transition and is an important starting point no matter where the congregation is in the transition process. Modules 2–4 cover the three chronological, or task-oriented, stages of transition. It is highly recommended that you begin with Module 1 no matter where you are in your transition. It sets the stage and builds a foundation for successful transition. After that, each module can be used independently and can even overlap based on the congregation’s transition timetable.

Module 4: Saying Hello focuses on the ideas, mind-sets, and tasks transition leaders should focus on once a rabbi and the congregation agree to enter into a new sacred partnership. The first nine months are a critical period and will set the stage for the new settled rabbi’s tenure.

Modules 2, 3, and 4 include the following:

- Highlights of the key concepts for that transition stage
- In-depth presentation of the main content for that stage of transition, including teachings from recognized experts in the field of transition management, case studies from the field, and best principles for successfully managing that stage of the rabbinic transition
- Exercises for use with different groups in your congregation, such as board, committees, and professional staff
- Resources for further learning and networking

Highlights of Saying Hello

- The overarching goal of the saying hello stage is to start building a healthy, sacred partnership between the new settled rabbi and the congregation. To achieve this goal, it is important for the transition leadership to pay attention to relationships as well as events.
- The relationship between rabbi and president is a sacred partnership, built around Jewish values including mutual respect, trust, honesty; communication, transparency, confidentiality, and reflection. This is true of all rabbi-president dyads, when a rabbi is new, even more deliberate planning and thought need to be given to how to nurture the partnership.
- During the period of saying hello, the congregation not only welcomes their next rabbi (and in some cases the rabbi’s family), but in the process also has the opportunity to engage with its members.
- Before fully embracing the new beginning signaled by the incoming rabbi settling into his or her tenure, the congregation will have encountered the “neutral zone,” often characterized by anticipation, impatience, and some disorientation, followed eventually by curiosity and receptivity. When managed thoughtfully and intentionally, most individuals come through the neutral zone within the first year to eighteen months of the new settled rabbi’s tenure. No longer being referred to as “the new settled rabbi” signifies the “new beginning” as understood by William Bridges.
Characteristics of the Saying Hello Stage

New beginnings, as William Bridges teaches, are not the same thing as new starts. A new start is situational, whereas new beginnings involve new understandings. In the case of rabbinic transition, the start of a new rabbi’s tenure happens on a set date. On June 30, the congregation had one rabbi, and on July 1, they have a new one. The new beginning is the thoughtful—and lengthier—process of shifting mind-sets and emotions that leads to the wholehearted embrace of this new reality.

Many of us think of rabbinic transition as a process that ends with the arrival of the new settled rabbi. Members of the search team and transition teams have worked hard for months, even years, to select the congregation’s next rabbi, and it can be tempting to think that the transition is complete once the rabbi’s start date has passed. However, the saying hello stage of transition begins once the settled rabbi has been chosen and continues through the first six to twelve months of the rabbi’s tenure.

When a congregation first announces who the next senior or solo rabbi will be, individuals react in a variety of ways. For example, some congregants will experience a surge of excitement, optimism, and commitment, energized by the sense of possibility that accompanies the change in rabbinic leadership. Others may feel uncertainty about the future, wondering where they will fit in after the new settled rabbi arrives. Members who have planned life-cycle events in the coming year may be especially susceptible to feeling unsettled, not knowing what to expect.

While you can’t predict each individual reaction, good transition management means understanding that there will be a variety of reactions, that they will not always appear rational, and that they need to be acknowledged openly and compassionately, without shaming people for their natural and human responses.

It’s important to remember that the beginnings stage does not have just one beginning and concluding point. People enter this stage only after they have moved through the feelings of loss that accompany endings and the in-between stage of the neutral zone. For those closest to the rabbi or to the congregation’s leadership, each stage of the transition often starts sooner, as they have had more time to imagine what the future looks like with a different rabbi. For other congregants, the whole psychological process may start much later, perhaps even the first High Holy Days after the new settled rabbi’s arrival.

The Stages of Transition 2

Part of the role of the transition team and other leadership is to expect—and communicate—that at any given time, congregants and staff will be in different places along the path of moving through the neutral zone and fully embracing the arrival of the new settled rabbi.

1 Note: The term “settled rabbi” refers to the rabbi who joins the congregation after a search for a new senior or solo rabbi. The new settled rabbi’s tenure might begin immediately after the departing rabbi’s exit, or an interim rabbi may serve the congregation before the search for a settled rabbi is undertaken. The question of whether or when to engage an interim rabbi is often one of the first discussions congregational leadership undertakes in the period of rabbinic transition. To learn more about the role and function of interim rabbis, visit these resources in The Tent. The Central Conference of American Rabbis (CCAR) Placement Office is the primary resource for both interim and settled rabbi searches.

Best Principles for Managing Transition in the Saying Hello Stage

The most important principle for managing the transition at this stage is deliberate and collaborative communication. Schedule and plan conversations among lay leadership, the settled rabbi, and senior staff to discuss together what a good beginning really looks like. To lay the groundwork for a healthy and sacred partnership, there is no substitute for spending time in meaningful conversation. It is extremely helpful to schedule these reflective conversations throughout the entire first year.

Be open about dilemmas around the meaning of sacred partnership. As the rabbi and president build a new relationship, working for the common good of the congregation, a topic that frequently comes up is “Who decides?” And then, “Who decides who decides?” Materials from the URJ about sacred partnership, mutual review, and different models of responsibility and accountability will help the rabbi-president dyad frame these early conversations.

Plan ahead to allot resources for one-time expenses related to transition. Some expenses are logistical or event-focused, such as moving expenses and installation weekend. Others are an investment in team building, planning, and time for reflection, such as a senior staff planning retreat, rabbinic/leadership coaching, and the URJ’s Shallat Rabbinic Transition Program and Retreat for presidents and new settled rabbis.

Support the needs of individuals and the institution. A good hello requires both logistical planning, to ensure smooth transfer of information and responsibilities, and paying attention to the human dimension of transition. Keep in mind that the rabbi is not only starting a new job, but in many cases is also adjusting to a new city or town, and that adjustment is multiplied when a spouse, partner, and/or children are involved.

Plan a variety of ways, public and private, large and small, for the congregation to welcome the rabbi (and the rabbi’s family, if applicable). In addition to being an expression of hachnasat orchim, the Jewish value of hospitality, these events are powerful opportunities for engaging members throughout the congregation. Here are some ideas from other URJ congregations about ways they have welcomed their new settled rabbis:

- Discuss plans for a rabbinic installation with the rabbi well in advance, perhaps even before the tenure begins. Collaborate and determine together how to make the most of this moment of welcoming.

- Create a video message from the rabbi to share with the congregation in the months before the rabbi’s arrival.

- Once the rabbi arrives, organize small gatherings of ten to twenty people, with congregants hosting for their own friends but also inviting the rabbi and family. These gatherings provide a more intimate and social way for the rabbi to learn names and know people in smaller groups.

- In small events like the house parties above, invite the rabbi to teach for a few minutes and have congregants share what they love about the synagogue and what they want the rabbi to know.

- At “get to know you” gatherings, invite congregants to fill out a card with their name, contact information, and something the rabbi could call upon them for in the coming years.

- Create a list of recommended merchants, local businesses, doctors, and restaurants. Personalized recommendations like “best bagels in town” or “best matzah ball soup” are a light way to share information and build goodwill.

- Offer assistance with the details of getting settled, such as having high school students help the rabbi unpack boxes of books in the new office.
Exercises and Resources for the Saying Hello Stage

The following exercises and resources were specifically designed and compiled for the saying hello stage of transition.

**Exercises**

One of the core principles of effective transition management is engaging directly with various stakeholders in your congregation. Exercises like the ones in this module provide you with structured, deliberate ways to help your congregation thoughtfully move through each phase of your congregation's rabbinic transition.

- Engagement Exercise: Saying Hello through History Day
- Engagement Exercise: Entering the Promised Land Isn't Easy
- Engagement Exercise: Case Studies on Saying Hello

There are exercises in Module 1 that provide important background material about transition in general, which may be useful if this is your first encounter with this resource or if you are in the early stages of transition:

- Exercise: In-Between Times and the Parable of the Trapeze
- Exercise: Transition Means Stages

**Resources**

To delve more deeply into the theory, best principles and practices of saying hello, we have put together a variety of resources, including readings by experts in the field of transition management and clergy transition, ways to connect with other congregational leaders who have been through it before, and other materials produced by the URJ and CCAR.

Books and articles on transition management and clergy transition:


Materials generated by congregational leaders, URJ staff, and CCAR, found in The Tent:

- *Sacred Partnership: A Resource and Discussion Guide*
- The URJ and CCAR are currently piloting a draft resource entitled “Introduction to Mutual Review.”
- The final resource will be published in late 2019. A copy of the draft resource can be obtained by filling out this form and gaining entry to the private tent group housing the document.

**Have more questions? Connect with these resources:**

- URJ Consulting and Transition Management Team
- URJ Knowledge Network Team
- The Senior/Solo Rabbinic Transition group in The Tent, where you can ask your own questions and get advice from other congregational leaders
Engagement Exercise: Saying Hello through History Day

Overview: In this session participants will share significant stories that are part of the congregation’s history. The purposes of this session are to celebrate the congregation’s history, familiarize the new settled rabbi with key moments or “myths” that are part of the congregation’s story, and begin to look forward—with excitement—to the new stage of congregational life about to begin.

Suggested Audience: This program is especially designed to engage congregants from a wide variety of backgrounds and demographics. Depending on the size of your congregation, you will want to decide whether it is more appropriate to open it to the entire congregation or whether to invite a selected subgroup, such as all board members, past and present, or a combination of subgroups and auxiliaries such as sisterhood, brotherhood, youth group, and religious school parents.

Goals: During this session, participants will

- Recollect and share memorable moments and events in the congregation's life
- Celebrate the congregation's accomplishments, transitions, and moments of transformation
- Produce and present fun ways of telling stories that reflect core values of the congregation
- Laugh and have fun

Materials Needed

- Microphone
- Large piece of butcher paper that displays a preliminary timeline of the congregation's history
- Markers and crayons, poster boards, tape and glue, assorted magazines, craft paper of assorted colors, and other art supplies
- Judaic objects, costume supplies, and a variety of props
- Stanchions to place on each of the tables indicating specific decades in the congregation's history
- Video recording devices and cameras
- Snacks or perhaps even a meal, if desired
- Name tags

Timeline: 2.5 hours

Depending on when this session takes place, it could be built around a meal, such as a Sunday brunch or a late afternoon/early evening Sunday dinner.

Be sure to allocate the following amount of time for each segment of the session:

- 0:00–0:05 Welcome
- 0:05–0:20 Connection
- 0:20–0:40 Review History of Congregation Timeline
- 0:40–1:15 Preparing to Tell Our Congregation’s Stories
- 1:15–1:30 Break and Viewing the Timeline
- 1:30–2:15 Telling Our Congregation’s Stories
- 2:15–2:25 Reflection
- 2:25–2:30 Next Steps
Preparation for the Facilitator(s)

1. Prepare a preliminary timeline of the congregation's history on a large sheet of butcher paper. The timeline should include the date of founding, dates of significant construction projects or moves, dates of previous clergy transitions, and other significant decisions, changes, or transitions that may be part of the shared knowledge of the congregation. Hang this timeline somewhere in the room where participants will be able to see it.

2. If the congregation has done previous work archiving the history of the congregation, bring examples of those materials to put on display either on tables or hanging on the walls in the room. They could also be spread around the various tables at which the participants will be sitting and doing their work.

3. Consider inviting a social worker or psychologist to have on hand during the session in case a surprise of emotional import arises, to be of assistance for that individual or group.

4. Extend special invitations to longtime members of the congregation to attend this special gathering. Reach out to past presidents and leaders, as they will have specific memories that will be helpful to share.

5. Table hosts: Identify ahead of time people who are able to serve as table hosts for a particular decade or set of decades. The role of the table host is to
   - Welcome participants as they arrive
   - Direct participants to sit at a table for a decade for which they have particularly strong memories
   - Help encourage and focus the conversation and work at that table

   The types of individuals you might select to serve as hosts could be members of the transition team or other leaders, congregants who have taken particular interest in the transition work and are able to assume a small leadership role, and past presidents or board members. Ask the table hosts to arrive 15–20 minutes early so that the facilitator can orient them to their roles and so that they are prepared to welcome participants as they arrive.

6. Room setup: Set up tables at which participants will be able to work in small groups. Place a stanchion indicating a decade (the ’60s, ’70s, ’80s, etc.) on each table. Groups will focus their work on their table’s decade. The number of tables will be determined by the age of the congregation, the age and length of membership of the expected participants, and the size of the space. Older congregations can choose to make groupings of decades, such as 1920s–1960s. Place all the art supplies on a central table so that participants can pick and choose what they would like to use in their small groups. Do the same with the props, ritual objects, and costume supplies.

7. Set up a table near the entrance with pens and name tags so that the participants can create a name tag as they arrive. Ask participants to also write on their name tag the year or decade in which they joined the congregation.

Facilitation

1. Welcome
   - As participants enter the room, invite them to sit at one of the tables designated for a decade in which they may have particularly strong memories or interest. (For example: the decade of their or their own child’s bar/bat mitzvah or confirmation, term serving on a team or board, teaching in the religious school, etc.)
   - Welcome the participants to the gathering, and thank them for coming.
   - Explain that this session brings the congregation into the last of the four stages of its transition work. If necessary, review the four stages: (1) planning for transition; (2) discovery; (3) saying goodbye; and (4) saying hello. This phase began with hiring the new settled rabbi and can continue for one to two years into the new settled rabbi’s tenure. There are many conversations the congregation will be having with the rabbi during this phase, yet the purpose of this conversation is to celebrate the congregation’s history, familiarize the new settled rabbi with key
moments or “myths” that are part of the congregation’s story, and begin to look forward with excitement to the new stage of congregational life about to begin.

- Explain the timeline for the gathering.

2. Connection: Invite the participants to get to know the other people sitting at their table. Ask the participants to introduce themselves and briefly share a memory from the decade designated at that table. Why did they choose to sit at that table?

3. Activities

   Review Congregational History Timeline
   - Explain that there are possibly hundreds of years of wisdom in the room, and together they are going to create and tell the story of the congregation.
   - Direct the participants’ attention to the prepared timeline. Walk everyone through what’s written on it, taking time to ask for additions or corrections to the timeline. Ask participants if anything significant is missing.

Preparing to Tell the Congregation’s Stories

- Explain that in between all the significant events, there are many other memorable events or recollections that everyone carries in their hearts and minds. Without negating the importance of any one story, the task of each table is to work together to identify and tell an interesting story from the designated decade that you think reflects a core value or attribute of the congregation. Prompt participants with the following:
  ° Think of something that happened in the congregation that made you proud.
  ° Was there a challenge or lesson learned that helped move the congregation forward or transform it in some way?
  ° One of the purposes of this gathering is to help the new settled rabbi learn about the congregation as a whole. There will be other times in which the rabbi will get to know each of us individually. Therefore, be judicious in selecting a story that will help meet that goal.

- Explain that telling a story in an interesting way requires them to
  ° Use the art supplies provided so that the story can be depicted and added to the timeline mural.
  ° Devise a fun way to orally present the story: skit, song, rap, poem, or choral reading. Point out the available props and costumes.

- Give participants plenty of time to identify and work on their stories.

- When the groups have finished their work and are getting ready to move on, instruct them to add their visual depiction of the story to the timeline and clean up their art supplies.

Break and Viewing the Timeline

- Give the participants a break. Instruct them that during the break they should look at the museum of visual depictions that have been added to the timeline.

- During this break you may also choose to reorganize the tables and chairs so that a central stage-like space can be made for the oral presentations. You may also choose to move into another room for this next section of the program.
Telling Our Congregation’s Stories

- Beginning with the earliest decade, invite each group to give their oral presentations to the rest of the audience. If possible, video these presentations so that you can capture them for posterity and for future reference.
- Give every group a chance to present their story.

4. Reflection

Discuss together with the whole group:

- What was your favorite story or recollection?
- What about our congregation makes you most proud?
- Invite people to reflect in general on the gathering and the experience. If possible, invite the new settled rabbi to share his/her reflections on the gathering.

5. Next Steps

- Thank everyone for coming. Let them know whom to contact with additional thoughts or questions.
- If appropriate, inform participants of the date and time of the next gathering.
Exercise: Entering the Promised Land Isn’t Easy

Overview: This exercise uses Torah text to explore our resistance to change. The time of welcoming a settled rabbi is very exciting, but many in the congregation (especially those less involved in the search and transition process) may still be struggling with the feelings of anxiety and disorientation that a transition causes. While many in the congregation, particularly those who were involved in the search or are in a position of leadership, are ready for the saying hello stage of the transition, it is important to help those who are still in the saying goodbye stage or the early stages of the neutral zone. Please see Module 1 for more detailed information about the stages of transition. This Torah text study explores the resistance to change that our ancestors exhibited and provides participants with an opportunity to discuss reasons for resistance and ways to overcome it.

Suggested Audience: The text study may be instructive for a variety of groups, including but certainly not limited to

- Transition team
- Board or executive committee
- Professional staff

Goals: Through reading and discussing the texts, participants will

- Identify and anticipate common reactions to the upcoming arrival of a congregation’s rabbi, including being aware of one’s own reactions
- Identify both guiding principles and concrete actions that can help the congregation say “a good hello” to their rabbi

Materials Needed

- Handouts for each participant with the texts and, if desired, discussion questions
- Pens and paper for personal note-taking
- Flip chart or whiteboard for group note-taking

Timeline: 1 hour

00:00–00:05 Welcome
00:05–00:20 Connection
00:20–00:40 Discussion of Torah texts
00:40–00:50 Reflection
00:50–01:00 Next steps

Preparation for the Facilitator(s)

1. Read through the Torah texts and accompanying discussion questions.
2. Prepare handouts, and ensure participants have pen and paper for note-taking.
3. Room setup: If possible, place chairs in a circle so that all participants can see and hear one another.
4. Identify one person to keep track of time.
Facilitation

1. Welcome
   - Welcome the group and thank them for participating.
   - If the participant group is part of the transition leadership, explain that this exercise is designed to support them in their planning.
   - If the participant group is not part of the transition leadership, explain that their responses will be communicated to the transition team, to support them in their planning.
   - Explain the timeline for the next hour.

2. Connection
   - Ask participants to silently read and to make note of at least one aspect in each text that rings true for them.
   - As a whole group, have participants each share one thing they read in the texts that feels particularly important or true to them.
   - To conclude this part of the exercise, share anything you notice about themes that were shared by participants (such as patterns, themes, or tensions).

3. Discussion of Torah Texts and Time for Reflection
   - Facilitate a group discussion of the texts, using the questions as a guide.
   - Ask a notetaker to keep records and a timekeeper to help you keep track of time.

   Challenges
   - What actions will help the members of your congregation who are resistant to the transition and stuck in endings or early in the neutral zone move forward?
   - What principles or values do those actions represent or bring to life?
   - What are some other or additional ways that those principles could be enacted, in this congregation or in yourself?

   Reactions
   - What feelings or sentiments are expressed or implied by different individuals in the text?
   - What are some healthy ways to allow people to communicate these feelings?
   - What resources do you have or do you need to help this happen?

   Leadership for Transition
   - What do the Israelites in these stories need most from their leadership?
   - What does our congregation need from us?

4. Next Steps
   - Collect the notes and recorded reflections. Save this feedback for future reference.
   - Thank everyone for coming. Let them know whom to contact if they have additional thoughts or questions.
   - If appropriate, inform participants about the date and time of the next gathering.
Text Study: Torah Texts

Instructions:

- Distribute the handout on pages 18–19.
- Read through the texts and answer the questions together or in small groups.

For your convenience, we are listing the questions here as well, together with sample answers in brackets to some of the questions that can help you guide the conversation:

1. Two months after the Exodus from Egypt and witnessing the parting of the Red Sea:

   In the wilderness, the whole Israelite community grumbled against Moses and Aaron. The Israelites said to them, “If only we had died by the hand of the Eternal in the land of Egypt, when we sat by the fleshpots, when we ate our fill of bread! For you have brought us out into this wilderness to starve this whole congregation to death.” (Exodus 16:2–3)

   The people took to complaining bitterly before the Eternal… The riffraff in their midst felt a gluttonous craving; and then the Israelites wept and said, “If only we had meat to eat! We remember the fish that we used to eat free in Egypt, the cucumbers, the melons, the leeks, the onions, and the garlic. Now our gullets are shriveled. There is nothing at all! Nothing but this manna to look to!” (Numbers 11:1, 11:4–6)

   - These are among the many episodes where the Israelites complain to Moses. What are they reacting to with their complaining? What are their fears? [Change, having to take care of themselves, etc.]
   - How do they remember life in Egypt? Do you think it was as good as they remember it? [Not unless you like being a slave!]
   - What do you think that members of our congregation are afraid of during this transition?
   - How might they see the past through “rose-colored glasses”? Why would they do that?
   - Rabbi Harvey Fields, in his book *A Torah Commentary for Our Times*, says, “The Israelites did what many people in similar circumstances do. They idealized the past because they were so frightened about the uncertainties of the future.” Do you agree with this statement? Can you think of examples outside of the Torah (personal, synagogue, etc.) where people have reacted this way?
   - Whether or not we think our congregants’ complaints are justified, what can we do to help them with their fears and anxieties during the transition? [Listen to them, communicate openly about the transition and what is happening, provide many opportunities for them to get to know the new settled rabbi and become comfortable with the new reality, provide opportunities to celebrate the past but look to the future, etc.]

---


2. In *Parashat Shlach L'cha* (Numbers 13:1–15:41) we read the story of the spies whom Moses sent to “check out” the Promised Land. Rabbi Fields summarizes the story:

The scouts spend forty days exploring the land. Before they return they stop in the valley of Eshkol near Hebron, where they cut a cluster of grapes and gather some pomegranates and figs. Upon their return, they show the fruits to the Israelites, proving that the land they scouted is indeed flowing “with milk and honey.” However, ten of the spies frighten the Israelites. After displaying the fruit of the land, these ten tell stories of the powerful people, the large fortified cities, and the dangerous inhabitants.

The report terrifies the community. Caleb, however, seeking to assure the people, says, “Let us by all means go up [to the land] and we shall gain possession of it, for we shall surely overcome it.”

Spreading even more fear, the ten spies claim that the country “is one that eats up its inhabitants. All the people we saw are giants,” they say. “We looked like grasshoppers to ourselves, and so we must have looked to them.”

The entire community of Israelites turns on Moses and Aaron.6

At the end of this story the Israelites are punished with forty years in the wilderness. Aside from Caleb and Joshua, no one from the current generation will live to enter the Promised Land.

- Why is the situation in this text even worse than in text 1? [They lose their opportunity to be part of the future; they have to dwell in the past for forty years, etc.]
- What stage of the transition are the Israelites stuck in? [The neutral zone.]
- While most transitions do not need forty years and the death of an entire generation, why do transitions take time? How much time do you think the new settled rabbi and the congregation will need for the saying hello stage of the transition? [At least a year.]
- How can you help congregants who don't want to leave the wilderness move forward into the Promised Land?
- Rabbi Jonathan Sacks, in his book *Lessons in Leadership*, says the following: “One of the fundamental tasks of any leader from president to parent is to give people a sense of confidence—in themselves, in the group of which they are a part, and in the mission itself.”7 Do you agree with this statement? How can our synagogue leadership achieve this?

---


**Torah Texts**

**Text 1**

Two months after the Exodus from Egypt and witnessing the parting of the Red Sea:

In the wilderness, the whole Israelite community grumbled against Moses and Aaron. The Israelites said to them, “If only we had died by the hand of the Eternal in the land of Egypt, when we sat by the fleshpots, when we ate our fill of bread! For you have brought us out into this wilderness to starve this whole congregation to death.” *(Exodus 16:2–3)*

The people took to complaining bitterly before the Eternal…. The riffraff in their midst felt a gluttonous craving; and then the Israelites wept and said, “If only we had meat to eat! We remember the fish that we used to eat free in Egypt, the cucumbers, the melons, the leeks, the onions, and the garlic. Now our gullets are shriveled. There is nothing at all! Nothing but this manna to look to!” *(Numbers 11:1, 11:4–6)*

**Questions for Discussion:**

- These are among the many episodes where the Israelites complain to Moses. What are they reacting to with their complaining? What are their fears?
- How do they remember life in Egypt? Do you think it was as good as they remember it?
- What do you think that members of our congregation are afraid of during this transition?
- How might they see the past through “rose-colored glasses”? Why would they do that?
- Rabbi Harvey Fields, in his book *A Torah Commentary for Our Times*, says, “The Israelites did what many people in similar circumstances do. They idealized the past because they were so frightened about the uncertainties of the future.” *(Numbers and Deuteronomy)* Do you agree with this statement? Can you think of examples outside of the Torah (personal, synagogue, etc.) where people have reacted this way?
- Whether or not we think our congregants’ complaints are justified, what can we do to help them with their fears and anxieties during the transition?

---

In Parashat Sh’lach L’cha (Numbers 13:1–15:41) we read the story of the spies whom Moses sent to “check out” the Promised Land. Rabbi Fields summarizes the story:

The scouts spend forty days exploring the land. Before they return they stop in the valley of Eshkol near Hebron, where they cut a cluster of grapes and gather some pomegranates and figs. Upon their return, they show the fruits to the Israelites, proving that the land they scouted is indeed flowing “with milk and honey.” However, ten of the spies frighten the Israelites. After displaying the fruit of the land, these ten tell stories of the powerful people, the large fortified cities, and the dangerous inhabitants.

The report terrifies the community. Caleb, however, seeking to assure the people, says, “Let us by all means go up [to the land] and we shall gain possession of it, for we shall surely overcome it.”

Spreading even more fear, the ten spies claim that the country “is one that eats up its inhabitants. All the people we saw are giants,” they say. “We looked like grasshoppers to ourselves, and so we must have looked to them.”

The entire community of Israelites turns on Moses and Aaron. 4 At the end of this story the Israelites are punished with forty years in the wilderness. Aside from Caleb and Joshua no one from the current generation will live to enter the Promised Land.

Questions for Discussion:

• Why is the situation in this text even worse than in text 1?

• What stage of the transition are the Israelites stuck in?

• While most transitions do not need forty years and the death of an entire generation, why do transitions take time? How much time do you think the new settled rabbi and the congregation will need for the saying hello stage of the transition?

• How can you help congregants who don’t want to leave the wilderness move forward into the Promised Land?

• Rabbi Jonathan Sacks, in his book Lessons in Leadership, says the following: “One of the fundamental tasks of any leader from president to parent is to give people a sense of confidence—in themselves, in the group of which they are a part, and in the mission itself.” 5 Do you agree with this statement? How can our synagogue leadership achieve this?


Discussion Guide: Case Studies on Saying Hello

Overview: This exercise uses three fictionalized case studies to highlight and explore some of the common themes and experiences of congregations as they prepare to say hello to and welcome their new settled rabbi.

Suggested Audience: While the case studies may be instructive for a variety of groups, they are designed to be used by those closest to the transition leadership, including the following:

- Transition team
- Board or executive committee
- Professional staff

Goals: Through reading and discussing the case studies, participants will

- Identify and anticipate common reactions to the upcoming arrival of a congregation's rabbi, including their own reactions
- Identify both guiding principles and concrete actions that can help their congregation say “a good hello” to their rabbi

Materials Needed

- Handouts for each participant with the case study narratives and, if desired, discussion questions
- Pens and paper for personal note-taking
- Flip chart or whiteboard for group note-taking

Timeline: 1 hour

00:00–00:05 Welcome
00:05–00:20 Connection
00:20–00:40 Discussion of Case Studies
00:40–00:50 Reflection
00:50–01:00 Next Steps

Preparation for the Facilitator(s)

1. Read through the case studies and accompanying discussion questions.
2. Prepare handouts and ensure participants have pen and paper for note-taking.
3. Room setup: If possible, place chairs in a circle so that all participants can see and hear one another.
4. Identify one person to keep track of time.

Facilitation

1. Welcome
   - Welcome the group and thank them for participating.
   - If the participant group is part of the transition leadership, explain that this exercise is designed to support them in their planning.
   - If the participant group is not part of the transition leadership, explain that their responses will be communicated to the transition team, to support them in their planning.
   - Explain the timeline for the next hour.
2. Connection
   • Ask participants to silently read all three case studies and to make note of at least one aspect in each case that rings true for them.
   • Have participants each share one thing they read in the case studies that feels particularly important or true to them.
   • To conclude this part of the exercise, share any common ideas or responses that participants gave.

3. Discussion of Case Studies
   • Facilitate a group discussion of the cases, using the following questions as a guide.
   • Ask a notetaker to keep records and a timekeeper to help you keep track of time.

   Actions
   • What concrete actions do you see in the case studies that will help these congregations create a “good beginning,” one that is healthy for both the rabbis and the congregations?
   • What principles or values do those actions represent or bring to life?
   • What are some alternative or additional ways that those principles could be enacted, in these congregations or in ours?

   Reactions
   • What feelings or sentiments are expressed or implied by different individuals in the case studies?
   • What are some ways to allow people to communicate these feelings?
   • What resources do you have or do you need to help this happen?

   Leadership for Transition
   • What do the congregations in the case studies most need from their leadership?
   • What does our congregation need from us?

4. Reflections
   • Ask and share answers to the following questions:
     • What is useful about reflecting on the experience of other congregations?
     • Having gone through this exercise, what is on your mind now about our congregation?
     • What actions do we need to take? What are our next steps?
   • Share with the group that learning from the experience of other congregations will help your transition leadership anticipate and plan for your own congregation’s transition.

5. Next Steps
   • Collect the notes and recorded reflections. Save this feedback for future reference.
   • Thank everyone for coming. Let them know whom to contact if they have additional thoughts or questions.
   • If appropriate, inform participants about the date and time of the next gathering.
Three Case Studies on Saying Hello

This exercise uses three case studies to highlight and explore some of the common themes and experiences of congregations as they prepare to say hello to a new settled rabbi.

On the following pages you find handouts for your discussions about the three case studies.
Case 1

Anshe Tikvah

Interim Rabbinic Year

The decision was made at Anshe Tikvah to hire an interim rabbi for one year, between the retirement of their first full-time, long-term rabbi and the hiring of a new permanent (often referred to as “settled”) rabbi. There were concerns about the decision. (“Will we lose members during the interim year, and if so, how many?” “Will an interim rabbi just prolong the search process and keep things unsettled and unable to move forward for an additional year?”) However, after thoughtful consideration and deliberation, the decision was made to hire an interim rabbi. The reasons for this were primarily twofold:

1. It was important for the congregation to have a model of rabbinic leadership different from what they were accustomed to. They had known only one rabbi. The concern was that an immediate search for a new settled rabbi would lead them to look for either a rabbi just like Rabbi Zinder, who was retiring, or quite the opposite, a rabbi not like her at all. The “break” of an interim year would provide the opportunity to understand that rabbis come in many different “shapes and sizes” and would give the congregation additional time to figure out who they were as a community and who they wanted to be moving forward, before finding a rabbi whose innate skills, characteristics, and rabbinic gifts would be well-matched to their needs.

2. It was suggested that as a congregation facing the retirement of a long-term rabbi, rabbis in search might feel more comfortable applying to a congregation that had been through the interim program, rather than facing the dreaded possibility of becoming an “unintended interim.” “Unintended interim” is the phrase used to describe a new, settled rabbi who follows a successful, long-term rabbi but does not last beyond one contract cycle. This often happens when a congregation still has an image of “their” rabbi in mind—positive or negative. Obviously, no two rabbis are alike, and unfair expectations can be placed on the new settled rabbi to step immediately into an unattainable position, either matching the former rabbi completely or being quite the opposite, or a combination of the two.

During the interim rabbinic year, members of the transition team and board of trustees expanded their outreach to keep members of the congregation engaged. With the guidance and support of their interim rabbi, they continued to run focus groups and reached out to members to “check the pulse” of the congregation. They found that even many of the people who were unsure about the idea of an interim rabbi were staying involved and engaged. Engagement appeared to even be up, with many people saying that they were enjoying the varied opportunities that were being offered to get to know their fellow congregants.

Focus groups asked congregants, in multigenerational groups, to discuss what they believed Anshe Tikvah represented as a congregation. Where did they want to go as a community? What were their passions and concerns with respect to the congregation, the local community, and the larger world? As members of the congregation, what issues and concerns kept them awake at night? What was the “why” of Anshe Tikvah? What made the congregation unique, and what gifts did the synagogue bring to the community as well as its own congregants, and vice versa?

The staff, too, felt that the interim rabbinic year was a positive experience. Although it placed a bit more responsibility on the permanent staff with respect to outreach and maintaining relationships with congregants, the staff realized that it was good for them, too, to work with and observe a very different rabbinic presence from the one they had known (and loved!) for so many years. They realized that it was beneficial to have a year of reflection in which to grieve for the loss of their rabbi and prepare for the arrival of a new, settled rabbi. They realized, as much of the congregation did, that the interim year provided a wonderful preparation to fully welcome and embrace a new settled rabbi.

Allocating Financial Resources for the First Year with the Next Settled Rabbi

Drawing up the budget well ahead of time for the first year with their new, settled rabbi, the budget and finance committee sought to provide extra resources for settling rabbi and family into the community. They also budgeted for a full-day summer staff retreat with an outside facilitator, welcome activities including the rabbi’s installation, and the URJ’s transition management seminar, the Shallat Rabbinic Transition Program and Seminar, for the rabbi and president or president-elect. Additionally, they provided money under the rabbinic line for rabbinic coaching, in case their next rabbi needed some skill-building in certain areas. For instance, they realized that if their next rabbi did not have any previous experience supervising or leading staff, it would be important to provide coaching resources in this area.

Once the budget and finance committee completed its work and the budget was accepted by the board and then the congregation at the annual congregational meeting, the development committee was able to begin fundraising for the extra dollars that would be needed in the first year with their new settled rabbi. It was helpful to be able to provide a clear budget for these costs to select members of the congregation who had the financial means to provide additional support for one year, to help ensure the success of their next rabbi’s tenure.

Introducing the New Settled Rabbi

In late January of the interim rabbinic year, a letter went out to the congregation inviting them to a congregational meeting. The search team made their recommendation, approved by the board of trustees, to hire Rabbi Josh Goldberg as Anshe Tikvah’s next rabbi. Included in the letter was a short biography of Rabbi Goldberg and information on his background and interests (both rabbinic and personal). There were photos of him with his family and a short paragraph written by him about his excitement at the prospect of becoming Anshe Tikvah’s next rabbi. At the congregational meeting, a video was played of Rabbi Goldberg offering a short introduction of himself and his background. The congregation voted overwhelmingly to hire Rabbi Josh Goldberg as only the second settled rabbi in Anshe Tikvah’s history.

Preparing to Welcome the New Settled Rabbi

Once Rabbi Goldberg was chosen, the transition team’s work kicked into high gear again. Sub-teams were formed to welcome the new settled rabbi: one to help the rabbi and his family settle into the community, another to plan the late-summer welcome weekend as well as “kaffeeklatches” and living room salons for more intimate gatherings with lay leaders, former presidents, large donors, and other targeted member cohorts. Rabbi Goldberg provided some spring dates and times when he could meet with the summer and early-fall b’nei mitzvah families individually by video conference.

July Begins with a Next Rabbi

Rabbi Goldberg joined the congregation on July 1. The staff and congregational leadership welcomed him warmly. As he began learning the names of active members in the congregation, he was also busy settling into the new community and helping his family to settle in as well. The interim rabbi had left folders in the computer with information on the major holiday events throughout the year and other important things for Rabbi Goldberg to know, and the staff was happy to fill him in with additional information. Fortunately, Rabbi Goldberg had already been involved from afar in some of the calendar meetings that were held in the spring. Almost immediately, he and the cantor began meeting to talk about the upcoming High Holy Days.

People were bursting with the ideas that had been generated through the many focus-group discussions during the previous year. But there was an awareness that the rabbinic change itself was a big one for the congregation that needed to continue to be monitored. Depending on how quickly the congregation, lay leadership, staff, and Rabbi Goldberg were
feeling comfortable and “at home” would help to determine when other potential changes could begin to be addressed and new ideas implemented. It was a careful balancing act: wanting to sustain the excitement and vibrant energy unleashed by change, while not wanting to fall into a “transition deficit” caused by too many changes and new initiatives, not appropriately monitored for how well people were adjusting to them. Everyone realized the importance of being in this for the long haul rather than risking the burnout that could come with trying to accomplish too much in a short time frame.

At the beginning of August, an all-day staff retreat was held offsite, at a local conference center. Although the staff was small at Anshe Tikvah, their previous rabbi, Noa Zinder, was a very capable team leader. Leadership and staff alike believed that this was a key ingredient in Anshe Tikvah’s success as a congregation. Realizing that this was an important area in which he had little training or experience, Rabbi Goldberg reached out to the CCAR for a list of rabbinic coaches to help him build his skills. Proposals were solicited from three coaches, and together Rabbi Goldberg and the congregation’s president decided on the most appropriate for their needs. Rabbi Goldberg appreciated that the congregational leadership had designated funds both for a rabbinic coach for him and for a facilitator for this staff retreat. He invited his coach to facilitate the retreat, at which he wanted to focus primarily on team-building exercises and delineating staff responsibilities.

Welcome Weekend

The summer flew by quickly. Rabbi Goldberg’s installation weekend was planned for early November, but in the meantime, the third weekend in August was designated for a welcome to the rabbi. It dovetailed with the annual Sunday morning educational open house, at which the community (both members and non-members) were invited for a “fun-day” of activities and introductions to the formal and informal learning opportunities at Anshe Tikvah.

In addition to the Sunday morning activities, the weekend included a Friday night service featuring both a pre-neg and oneg, a Saturday afternoon “history day” activity (see “Saying Hello through History Day” exercise in this module), and a Saturday night “bring your own picnic” followed by a Havdalah service at the local park. The weekend culminated on Sunday afternoon with a late afternoon cocktail party for the families of the board of trustees, past presidents, and staff at the president’s home. Throughout the weekend, many people approached Rabbi Goldberg and his family to welcome them and tell them how happy they were that the family had chosen to join their community.
Case 2

Temple Beit Ahavah

A Close Look at Systems and Procedures

Temple Beit Ahavah's search team and board focused on bringing in an interim rabbi who was skilled in understanding leading-edge synagogue systems and procedures. During the interim rabbi’s year with the congregation, job descriptions were developed. Staff and board members were asked to provide information on how they viewed their job, how they spent their time, and what they believed were their strongest skill sets and greatest challenges. A small team worked diligently, with input from the interim rabbi, to help codify the descriptions and figure out where and how gaps would be filled. Revenue development was another area of focus, conducted by a different team. The budget was carefully examined, and it was determined that with some increased savings in a few operational areas, shifting some responsibilities around, and a targeted fund development program, a part-time engagement director could be hired. The idea was to take some of the heavy programming responsibilities off the rabbi’s shoulders and allow him or her to devote more time to pastoral concerns, teaching, and fund development opportunities.

Role of the Transition Team

Meanwhile, transition team members were very involved during the interim year reaching out to congregants to make sure that members were continuing to feel connected to the congregation. There were many communications with the membership, using a variety of forms (Temple Beit Ahavah’s website, the Facebook page, weekly e-blast, inserts in the one-page handout at services, the bulletin board in the lobby, and both the electronic and print monthly newsletter) to ensure the likelihood of everyone staying informed. This level of transparency was appreciated and encouraged. Although attendance at services and events did seem to fall off a bit, the transition team, drawn from congregational cohorts, did a good job of outreach to those who seemed to be “taking a break” during the interim year, to personally update them on how things were proceeding and to let them know that others were aware of their decreased involvement. Many of the members had very good reasons for their decreased involvement that were unrelated to the interim rabbi’s tenure. Everyone was very appreciative of the outreach, feeling that they really were members of a community, not just names in a database.

Additionally, the transition team worked diligently to find, from within the ranks of the congregation, facilitators for the many focus groups that took place during the interim year. From among the larger congregation, some new faces became more regular fixtures at meetings. The transition team co-chairs realized that these new faces could help provide new leadership in the coming years. They shared with temple president Heidi Levine and president-elect Jake Sherman the idea of creating a leadership development program for these new, potential leaders after the major responsibilities of the larger transition team were less burdensome. They suggested that Heidi and Jake look at the modules in the URJ Emerging Leaders Resource.

Sacred Partnership

Returning from the URJ Scheidt Seminar for Presidents and Presidents-Elect, incoming president Jake Sherman was excited to share with the board, staff, and congregation the concept of sacred partnership that he learned about at the conference. Everyone believed that there was already an innate sense of this type of partnership at Temple Beit Ahavah (TBA), but Jake liked the idea of making it more explicit and transparent as an important and integral component of the congregation’s culture. He was excited to begin the work of envisioning and modeling it with whomever the congregation chose as its next rabbi. In the meantime, Jake began encouraging board members, teams, and staff to focus on instances that highlighted sacred partnership and those that didn't, in an effort to understand the concept more deeply. Jake decided that he would start each of his board meetings asking for an example of sacred partnership in action to be shared.
Rabbinic Liaison Team

When the former rabbi, Zach Tzion, was leaving TBA, the president, immediate past president, and incoming president held an exit interview with him. Everyone agreed that the exit interview was a valuable experience.

Considering how to make the new settled rabbi’s tenure most successful, the decision was made to institute a rabbinic liaison team. This team of three to five people would meet regularly with the new settled rabbi to discuss concerns—both those brought forward by the rabbi and those voiced by members of the congregation. The team would not be a “review” team, but rather would serve as a bridge between the new settled rabbi and the congregation. For the team to be successful, it was essential that its members be respected, circumspect leaders who would maintain the utmost confidentiality and respect for the responsibility of their role. The time that the rabbinic liaison team would remain in place was left open-ended. Everyone believed that it would be necessary for at least a year but realized that if it was proving successful, there might be the wish to extend it for a longer period of time. They had learned that some congregations maintained a rabbinic liaison team as a standing team of the congregation. In other congregations, after a period of time the rabbi developed his or her own “kitchen cabinet” to serve as a sounding board and offer alternative perspectives to the rabbi’s own. The key would be to make sure that the rabbi had the support of a few key, close confidants—whether they were chosen for this team or developed over time through the rabbi’s own growing relationships.

Mutual Review Process

In addition to taking a close look at policies and procedures and instituting job descriptions, the board committed to a process of mutual review. A protocol was developed, with guidance from documents provided by the Reform Movement. This process dovetailed nicely with the board’s commitment to developing, with staff input, shared goals that could be clearly delineated. A RASCI system was developed: with the new job descriptions for staff (and a mirror process for board members), it became clearer who was to be Responsible, Accountable (or Approver), Consulted, and Informed with respect to the major initiatives. There would now be a “roadmap” for staff and lay leadership, working together toward accomplishing goals. Everyone realized the importance of ongoing communication and cooperation between staff and lay leadership.

Introducing the New Settled Rabbi to the Congregation

In February, it was announced to the congregation that Rabbi Sari Schwartz was the board’s unanimous choice to become Temple Beit Ahavah’s next rabbi. The membership was invited to a congregational meeting to ratify the board’s decision. Rabbi Schwartz’s biography and pictures of her and her family were uploaded to the temple’s members-only website page, as was a short video of Rabbi Schwartz introducing herself to the community. The search team’s recommendation to the board, noting Rabbi Schwartz’s background, abilities, and why they believed she was the best choice to be the congregation’s next rabbi, was also uploaded to the page, as well as excerpts from Rabbi Schwartz’s references. There was a desire to make sure that the congregation felt comfortable with their level of knowledge of Rabbi Schwartz before they voted to hire her as the congregation’s next rabbi.

Introducing the New Settled Rabbi to the Larger Community

On July 1, Beit Ahavah welcomed Rabbi Schwartz. Although it was a quiet time because many people were on vacation or otherwise engaged during the summer months, it was a perfect opportunity for the transition team to introduce her to the larger community. Meetings were arranged with the local newspaper to do a feature article on the congregation’s new rabbi. A member of the transition team reached out to the city council’s office to find out the protocol for inviting Rabbi Schwartz to give the benediction at an upcoming city council board meeting.

There was an active interfaith clergy group in town, too. Before leaving, departing rabbi Zach Tzion reminded his friends in the group that his successor would be arriving in a year and would no doubt be interested in joining them. Within weeks of her arrival, Sari Schwartz had an invitation to join the group when they started up again in the fall.
The Next Senior Rabbi is Named

During the rabbinic search process, Associate Rabbi Sheila Cohen was given a “bye” until the final round of interviews. This still required her to think deeply about her vision for her own rabbinate and what she would bring to the Beth Chayim community as their senior rabbi. At the meeting with the search team, at which she laid out her vision and her passion, it became clear that Rabbi Cohen had the imagination, innate skills, and leadership qualities needed to lead the congregation into the future. The search team voted unanimously to recommend her to the board of trustees as the next senior rabbi at Beth Chayim. The board unanimously accepted the recommendation, and a congregational meeting was called to ratify the board’s decision. Many congregants showed up for the meeting. There was an air of festivity as they voted overwhelmingly to make Rabbi Cohen their new senior rabbi.

Executive director Mark Levy realized that the work was certainly not finished. There was much work to be done rebuilding the team around a new senior rabbi, even if she was someone whom everyone already knew. He realized that they knew her as the associate rabbi, and it would take time and attention to reconfigure the relationships so that everyone, staff and congregant alike, would see her as their senior rabbi.

Reconfiguring Relationships and Responsibilities

Once Rabbi Cohen was ratified as the new senior rabbi at Beth Chayim, she and Mark Levy sat down to discuss a summer senior staff retreat. They reached out to their contacts for names of potential board facilitators to lead the senior staff through a process of coalescing around Rabbi Cohen as the senior rabbi. It would require that staff members begin to view her in a new and different role, as senior instead of associate.

Rabbi Cohen and temple president Rochelle Green met with the transition team to discuss cohorts that Rabbi Cohen should be meeting with in small groups to hear their opinions and present herself in the new role of senior rabbi–elect. Facilitated by the transition team, she began meeting with large donors in partnership with a member of the board, often Rochelle, as well as in small groups with other cohorts. The senior staff was drawn into the process, suggesting cohorts that they felt would be important for her to meet with in preparation for becoming the senior rabbi in a few short months. Retiring rabbi Steven Spiegel realized that he needed to begin to step back, and he spent much of his time “behind the scenes” enthusiastically endorsing Rabbi Cohen’s ascension. He sorted through his files and in May began to box up his books and files. He planned to move out of the office by June 15, allowing time for the office to be painted and Rabbi Cohen’s choice of décor to be readied for when it became her office on July 1. Knowing that it was important for the congregation to see Rabbi Cohen as their senior rabbi and not the associate, he was determined to keep a very low profile, particularly for the coming year. He relished the opportunity to come and go as he pleased from the community and looked forward to spending more time with his wife, children, grandchildren, and garden.

Both the senior staff and board were introduced to the RASCI (Responsible/Accountable/Support/Consulted/Informed) model for identifying roles and responsibilities for a congregation the size of Beth Chayim, with its layers of staffing levels and support. The upcoming change in senior rabbis was a good opportunity to introduce new concepts such as this, as everyone was figuring out the new dynamics surrounding Rabbi Cohen’s changed role in the congregational system.

With Rabbi Cohen moving up to the senior rabbi position, the congregation would need to hire a new assistant rabbi. A small search team was put together for the search for an assistant rabbi, and an application was submitted to the CCAR Placement office. Rabbi Cohen and Rochelle booked their tickets to fly out to the designated Hebrew Union College–Jewish Institute of Religion (HUC-JIR) campus for the first round of interviews for graduating rabbinic students.
Communications

Meanwhile, a small team was convened to create a marketing and publicity plan to introduce Rabbi Cohen in her new role to the larger community. Events were planned and press releases generated. Rabbi Spiegel was considered an “institution” in the community, and it would take time not only for congregants but for the larger community to see Rabbi Cohen in the same way. Ongoing communication was key to helping both members of the synagogue and leaders in the larger community welcome Rabbi Cohen in her new role.

Rabbinic Installation

The first weekend in November was chosen as the date for Rabbi Cohen’s installation. Although Rabbi Spiegel would be staying away from the congregation for the first year, everyone agreed that it was important for him to be present at the installation to symbolically pass the Torah into her hands and participate in her installation. Additionally, Rabbi Cohen reached out to a professor from HUC-JIR to participate in the weekend of festivities as scholar in residence. A sub-team of the transition team rolled up their sleeves and began the work of ordering invitations and putting Rabbi Cohen’s vision for the weekend into reality. It was agreed that there needed to be activities throughout the weekend to attract different cohorts within the congregation and the larger community: a Friday night worship service publicized not only to the congregation but to the larger community that would serve as the installation itself, a Saturday Torah service, lunch, and study session, followed by an evening gala and Havdalah, and a family fun day on Sunday in the early afternoon, with activities for families of all ages.