The URJ Rabbinic Transition Roadmap

Module 3: Saying Goodbye
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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 3: Saying Goodbye

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 settled 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 a successful transition. After that, each module can be used independently and can even overlap based on the congregation's transition timetable.

Module 3: Saying Goodbye focuses on the tasks and concepts that successful transition leaders will bring to bear during the months leading up to the current rabbi's departure.

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 Goodbye

- Saying goodbye well allows everyone, including the members of your congregation, your departing and incoming rabbis, and the departing rabbi’s new congregation (if applicable) to begin well when the time comes.
- Endings involve loss, and loss is emotional. Individuals respond to loss in many different ways, and it’s important to anticipate emotional responses, acknowledge them honestly and sympathetically, and give people a chance to express these feelings.
- As people move through saying goodbye, they may encounter the “neutral zone” before they are ready to fully embrace the new beginning. This neutral zone is often characterized by anticipation, impatience, and some disorientation, then eventually curiosity and receptivity leading up to the new beginning.

Characteristics of the Saying Goodbye Stage

While many of us think of transition as the beginning of something new, in reality transition always begins with an ending. Strong endings, as William Bridges teaches, precede and facilitate healthy beginnings. In the case of rabbinic transition, the congregation needs to go through a process of thoughtfully saying goodbye to the era of the departing rabbi’s tenure before beginning the next chapter in the life of the congregation with their next settled rabbi.

When a congregation first learns that the rabbi will be leaving, people react in a variety of ways. The specific circumstances of a rabbi’s departure will impact the kinds of reactions people will have. It’s not unusual in the case of a retiring rabbi for congregational leaders to be aware of the retirement two to three years in advance. The change in
Rabbinic leadership may be years away, but feelings of loss may surface once people start hearing the news. If the rabbi is moving on to another congregation, some congregants may feel anger, resentment, or a sense of abandonment. Others may feel unmoored or simply sad at the thought of losing a spiritual guide and mentor.

The congregation’s remaining clergy and professional staff often experience the stress of uncertainty as they contemplate working with a new colleague and supervisor. Board members and other lay leaders may worry that the rabbi’s departure will result in a decrease in membership. In some situations, there will be individuals who feel a sense of relief, especially if the departure was preceded by personal or institutional disagreements, disappointments, or discord. And some members of the congregation may simply be excited about the future and feel ready to spread out the welcome mat.

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.

Keeping in mind the graphic of the three stages of transition from Module 1 (in this module, you can find it on page 13), it’s important to remember that the saying goodbye stage does not have just one beginning and concluding point. Each person enters this stage when the reality of the upcoming transition penetrates his or her consciousness. For those closest to the rabbi or to the congregation’s leadership, the transition starts sooner, as they naturally begin to think about what the future looks like with a different rabbi. For other congregants, this stage may not begin for them until much later, perhaps even the first High Holy Days after the rabbi’s departure.

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 saying goodbye to one rabbi and anticipating the arrival of a new one.
Best Principles for Managing Transition in the Saying Goodbye Stage

The most important principle for managing transition in this stage is transparent, deliberate, and collaborative communication. Schedule and plan conversations among lay leadership, the departing rabbi, and senior staff to discuss together what saying goodbye well really looks like.

Support the needs of individuals and the institution. Saying goodbye well requires both logistical planning, to ensure smooth transfer of information and responsibilities, and paying attention to the human dimension of transition.

William Bridges frames the endings stage of transition in terms of grief and loss. In so doing, his work offers clear guidance on how to manage this stage of transition well. Most important, he teaches, is to deal directly and openly with the losses that people are experiencing or anticipating. Help people talk about the feelings that the rabbi’s departure raises for them. Both the departing rabbi and the lay leadership have important roles to play in attending to this personal, human dimension of change. Consider a variety of ways to get congregants, the rabbi, and other leaders to talk and listen to one another, including one-on-one conversations and facilitated exercises with stakeholder and constituent groups. Examples of these types of exercises can be found at the end of this module. In addition, a rabbi may wish to hold office hours in the months or weeks prior to his or her departure, creating the opportunity for personal goodbyes or meaningful conversations with individual congregants.

During this stage (and throughout the entire transition), communicate regularly with the congregation. Sharing information, again and again, even when you feel people should already know, not only disseminates important decisions and timelines, but also engenders trust and a sense of transparency that the congregation needs during a time when uncertainty can turn into anxiety. Dr. Jeffrey Lant, a marketing expert, argues that one must communicate information a minimum of seven times in an eighteen-month period before it is internalized by the intended audience.

Treat people and the past with respect and look for ways for those with past disagreements to find resolution before the rabbi’s departure. A well-designed, face-to-face exit interview with the departing rabbi can be a meaningful way to deepen the learning and reflection opportunities in the closing weeks of the rabbi’s tenure. For ideas about exit interviews, please visit the Senior/Solo Rabbinic Transition Group in The Tent.

Plan a variety of ways, public and private, large and small, for the congregation to bid the rabbi (and the rabbi’s family, if applicable) farewell. Here are some ideas from other URJ congregations about ways they have honored their rabbis as they said goodbye:

- Presenting a keepsake to the rabbi: “My congregation made a scrapbook where every family was invited to make a page—it is bursting with photos from life-cycle rituals; kids’ happy drawings; personal thank-you notes; funny anecdotes and pictures I didn’t even remember. I love it!” said one rabbi. This type of scrapbook can be an inclusive addition to a traditional “tribute book.”

- Finding a way to leave the rabbi’s Torah with the congregation: One congregation produced and distributed an edited volume of the rabbi’s sermons and writings from over the years, ensuring her teachings endured after she departed.

- Facilitating staying in touch: Another congregation bought postcards and labeled them with the rabbi’s new address, setting them out throughout the farewell weekend. The rabbi and his family asked people to drop them a line sometime in the coming year. The rabbi’s children loved getting all the mail, and it helped the whole family to get updates from congregants they enjoyed but weren’t close enough to be in regular contact with.
Exercises and Resources for the Saying Goodbye Stage

The following exercises and resources were specifically designed and compiled for the saying goodbye 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: A Mosaic of Emotions (page 10)
- Text Study: Moses Says Goodbye (page 14)
- Discussion Guide: Case Studies on Saying Goodbye (page 19)

Resources

To delve more deeply into the theory, best principles, and practices of saying a good goodbye, 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:

- Sample exit letters
- Liturgies and rituals for saying goodbye
- Samples of *divrei Torah* about rabbinic change and transition

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: A Mosaic of Emotions

Overview: This engagement experience enables people to understand more deeply the saying goodbye stage of transition and the related mixed feelings, including loss, relief, excitement, and even guilt.

Suggested Audience

- Board of trustees
- Executive board
- Professional staff
- Committees
- Other stakeholders (for example, auxiliaries, religious school parents, or founding members)

Goals: During this session, participants will

- Identify themselves in the stages of transition
- Describe their own emotions related to saying goodbye to the rabbi
- Understand the variety of emotional responses that saying goodbye might entail for different people

Materials Needed

- Flip chart (or whiteboard) and markers
- Prepared posters with goodbye quotes
- LCD projector, screen, and necessary cables for connecting to laptop or tablet
- Prepared slides
- Microphone
- Sets of sticker dots, enough so that each participant can take five dots
- Tape for hanging posters on the wall (painter’s tape)
- Snacks, if desired
- Name tags

Timeline: 75 minutes

00:00–00:05 Welcome
00:05–00:20 Connection
00:20–00:35 Activity: Naming Our Emotions
00:35–00:55 Activity: Small-Group Conversations
00:55–01:10 Reflection
01:10–01:15 Next Steps

1 Note: If necessary audiovisual equipment is not readily available, the information to be shared can be written up ahead of time on flip charts and pulled out at the appropriate time in the session.
Preparation for the Facilitator(s)

1. Prepare the following slides:
   - Slide 1: The stages of transition, as taught by William Bridges (see final page of this exercise for the graphic and citation)
   - Slide 2: Small-group discussion questions:
     1. What emotions or states of mind are embodied in this sentiment?
     2. How, if at all, are you experiencing this sentiment in relation to our rabbinic transition?
     3. Who else in the congregation might be experiencing this? Which constituencies or stakeholder groups?
     4. What do you imagine we need to do for those people in order to respond to this sentiment?

2. Prepare posters with goodbye quotes. Using the quotes listed below, write one quote in the center of each poster, leaving room for participants to place dots and write around the margins. Hang the posters on the walls around the room so they are visible for everyone to see.
   - “That awkward moment when you think you’re important to someone, and you’re not.” (Unknown)
   - “Saying goodbye doesn’t mean anything. It’s the time we spent together that matters, not how we left it.” (Trey Parker, Robert Lopez, and Matt Stone, The Book of Mormon)
   - “Moving on is simple. It’s what we leave behind that’s hard.” (Unknown)
   - “We are really going to miss trying to avoid you around here.” (Unknown)
   - “Saying goodbye is the most painful way of solving a problem.” (Unknown)
   - “It’s painful to say goodbye to someone you don’t want to let go… but more painful to ask someone to stay when you know they want to leave.” (Unknown)
   - “Goodbyes are hard. It may be hard for the person leaving, but it’s always harder for the one being left behind.” (Unknown)
   - “How lucky I am to have known somebody and something that saying goodbye to is so damned awful.” (Evan G. Valens, The Other Side of the Mountain: The Story of Jill Kinmont)
   - “Be well, do good work, and keep in touch.” (Garrison Keillor)
   - “If you are brave enough to say goodbye, life will reward you with a new hello.” (Paulo Coelho)
   - Other

3. Set up a table near the entrance with pens and name tags so that participants can create a name tag as they arrive. After creating a name tag, participants should also be sure to take a set of five sticker dots.

4. Set up the audiovisual equipment and speakers so that they are ready to go at the beginning of the session.

5. Room setup: Arrange chairs so that people can see and hear one another as well as easily see the posters and projected images.

Facilitation

1. Welcome
   - Welcome participants to the gathering and thank them for coming.
   - Explain that this session is one of several that the congregation is having as the community addresses the upcoming rabbinic transition.
2. Connection

- Invite the participants to introduce themselves.
- Display the slide showing the stages of transition, as taught by William Bridges.
- If you have a group of people who’ve participated in the past, invite them to recall the stages of transition. If necessary, the facilitator can briefly summarize the stages for the group.
- Referring to the slide, invite the participants to identify where they think they may locate themselves in the transition process. Invite a few participants to share their thoughts with the group. The facilitator may choose to probe more deeply with those who share:
  - How, if at all, have your feelings changed recently?
  - What has helped you move from one stage to another?
  - If you find yourself in the same stage as you’ve been, why do you think you haven’t yet made the shift from one to another?
- Explain the timeline for the program and that in this session they will be exploring the second stage of the transition process, goodbyes and endings.

Activities

Naming our Emotions

- Explain that everyone experiences saying goodbye in different ways, and it might bring up a variety of emotions. These feelings may include a sense of grief or loss, disorientation, relief, or even guilt. Participants may experience some or all of these during the rabbinic transition.
- Turn the participants’ attention to the posters around the room.
  - Explain that the quotes displayed on the posters express different sentiments that can accompany the process of saying goodbye to a rabbi.
  - Explain that there is an eleventh poster, which says “Other.” If there is a feeling or sentiment that isn’t expressed in one of the preselected quotes, participants can choose to write a sentiment of their own on this “Other” poster.
  - Explain to the participants that they will have a few minutes to wander around the room, read the quotes, and determine with which sentiment(s) of goodbye they currently identify. Participants are to place their dot(s) on those posters. Participants can use their dots in whatever manner they see fit, including placing multiple dots on a single poster to indicate they feel strongly about the quote or placing one dot on each poster that is applicable to their state of mind.
- Give the participants time to review the posters, add additional sentiments to the “Other” poster, and place their dots.
- Once everyone has had a chance to post their dots on the posters, give the participants a few moments to step back and look at the eleven posters. Invite those who may have written a new sentiment on the “Other” poster to share that aloud with the group.

Small-Group Conversations

- Select the four to six posters that have the most dots on them for small-group conversations.
- Divide the participants into groups, with each group discussing one of the selected quotes. If you selected four quotes, you need four groups; five quotes, five groups, etc.
• Display the slide with the small-group discussion questions.
• Invite each of the groups to gather around their poster for the small-group discussion. Invite the groups to discuss the quote by using the discussion questions posted on the slide. Instruct the groups to appoint a notetaker, who can take notes directly on the poster.
• Give the groups time to discuss their assigned quote, using the following discussion questions:
  - What emotions or states of mind are embodied in this sentiment?
  - How, if at all, are you experiencing this sentiment in relation to our rabbinic transition?
  - Who else in the congregation might be experiencing this? Which constituencies or stakeholder groups?
  - What do you imagine we need to do for those people in order to respond to this sentiment?

4. Reflection
• Gather again as a whole group and debrief this exercise. Discuss:
  - What did we learn about ourselves?
  - What did we learn about the congregation?
• Conclude the session by reminding the participants that transition takes time and that people go through it in different stages and at different paces. It is important for each of us—individually and as a community—to attend to the emotions that come with the various stages during the 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.

The Stages of Transition²
William Bridges

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Text Study: Moses Says Goodbye

Deuteronomy 32:48–33:1

Overview: This text study deepens the understanding of the challenges of saying goodbye. It explores the emotions of this stage through the perspective of Moses.

Suggested Audience
- Board of trustees
- Executive committee
- Professional staff
- Transition team

Goals: During this session, participants will
- Study part of the Deuteronomy story and a midrashic commentary in order to develop a deeper understanding of the saying goodbye stage of transition
- Apply insights gained from Jewish texts in preparation for the congregation’s rabbinic transition

Materials Needed
- Flip chart (or whiteboard) and markers
- Microphone
- Handout: Moses Says Goodbye (pages 17–18)

Timeline: 75 minutes
00:00–00:05 Welcome
00:05–00:20 Connection
00:20–00:40 Activity: Text Discussion
00:40–00:55 Activity: Small-Group Conversations
00:55–01:10 Reflection
01:10–01:15 Next Steps

Preparation for the Facilitator(s)
1. Read Deuteronomy 32–33. Review the passages from The Book of Legends: Sefer Ha-Aggadah that accompany this text study.
2. Read “Transition as ‘The Way Through,’” by William Bridges; the article can be found on the author’s website.
3. Room setup: Arrange the chairs so that people can see and hear one another.
4. Set up a table near the entrance with pens and nametags so that participants can create a name tag as they arrive.

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Facilitation

1. Welcome
   - Welcome the participants to the gathering, and thank them for coming.
   - Explain that this session is one of several discussions that the congregation is having as the community addresses the upcoming rabbinic transition.
   - Remind the participants about the several phases of transition and that while the emotions related to this phase are varied, they are often related to a sense of loss.

2. Connection
   - Invite the participants to introduce themselves.
   - Invite participants to recall a memorable goodbye they had to have with someone. It could be from the occasion of a dear friend or family member moving away, the death of a loved one, or even simply changing jobs. Invite the participants to turn to the two to three people sitting around them to share these memories together, thinking about the following:
     - How did you say goodbye to someone?
     - How did that person say goodbye to you?

3. Text
   - Explain that during this session they will be looking closely at texts related to a great loss in the story of the Israelites, the death of Moses.
   - Distribute copies of the handout “Moses Says Goodbye” to each participant.
   - Invite the participants to help set the stage for the story by reminding one another about how the Israelites got to where they are in the text and why Moses cannot enter the Land of Israel with them: Earlier on in their wanderings the people complained that they had no water. God commanded Moses to speak to a rock, and the water would come out. Moses, who was angry and frustrated with the people, struck the rock instead. God punished him by not allowing him to enter the Land of Israel with his people. The first text in this handout comes from the end of Deuteronomy as Moses is about to die. He will not be entering Israel and will be handing off the leadership to the next generation.
   - Invite one of the participants to read the passage from Deuteronomy 32–33 aloud for the group.
   - Discuss together:
     - What is the main point of the text? What is it about?
     - What do you imagine Moses is feeling in 32:48–52?
     - What happens in 33:1?
     - How do you imagine Moses is feeling now?
     - What questions do we have about the text?
   - Invite one of the participants to read the compilation of midrashim about Moses’s death aloud to the group.
• Discuss together:
  ◦ What does Moses request of God?
  ◦ How do you imagine Moses is feeling? How does this compare with how we thought he was feeling in the passages from Deuteronomy?
  ◦ How does God respond to and validate Moses’s feelings? What does God do? How does God ease Moses’s mind?

4. Reflection

• Invite the participants to turn back to the two or three people they connected with at the beginning of the session to discuss the following: How do the Torah passages and midrashim of Moses’s goodbye to the Israelites help us understand the challenges of saying goodbye to our rabbi?
• Invite the participants to share with the large group an insight they had about the connection between the texts and the congregation’s transition. Take notes on this discussion on a flip chart or whiteboard.
• Explain that despite Moses’s reluctance, he eventually got to a place in which he was ready to say goodbye. That was a time for blessing and forgiveness for Moses and for the Israelites.
• Discuss: What do we need to do as a congregation to reach that same place of acceptance?

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 with additional thoughts and questions.
• If appropriate, inform participants about the date and time of the next gathering.
Moses Says Goodbye

Deuteronomy 32:48–33:1

32:48 That very day the Eternal One spoke to Moses: 49 Ascend these heights of Abarim to Mount Nebo, which is in the land of Moab facing Jericho, and view the land of Canaan, which I am giving the Israelites as their holding. 50 You shall die on the mountain that you are about to ascend, and shall be gathered to your kin, as your brother Aaron died on Mount Hor and was gathered to his kin; 51 for you both broke faith with Me among the Israelite people, at the waters of Meribath-kadesh in the wilderness of Zin, by failing to uphold My sanctity among the Israelite people.

52 You may view the land from a distance, but you shall not enter it—the land that I am giving to the Israelite people.

33:1 This is the blessing with which Moses, God’s envoy, bade the Israelites farewell before he died.1

Questions for Discussion:

1. What is the main point of the text? What is it about?
2. What do you imagine Moses is feeling in 32:48–52?
3. What happens in 33:1?
4. How do you imagine Moses is feeling now?
5. What do you imagine changes Moses’s attitude?
6. What questions do we have about the text?

A Compilation of Midrashim on Moses’s Death

A divine voice came forth and said, “The time has come for you to depart from the world.” Moses pleaded with the Holy One, “Master of the universe, for my sake, remember the day when You revealed Yourself to me at the bush; for my sake, remember the time when I stood on Mount Sinai forty days and forty nights. I beg You, do not hand me over to the angel of death.”

[God finally has mercy on Moses. He may have to die like every other creature of flesh and blood, but he doesn’t have to die in the same way.]

“Fear not, I Myself will attend you and your burial,” God responds.

Moses pleaded, “Then wait until I bless Israel. On account of the warnings and reprimands I heaped upon them, they never found any ease with me.” Then he began to bless each tribe separately, but when he saw that time was running short, he included all the tribes in a single blessing.

Then he said to Israel, “Because of the Torah and its precepts, I troubled you greatly. Now, please forgive me.”

They replied, “Our master, our lord, you are forgiven.” In their turn they said to him, “Moses our teacher, we troubled you even more, we made your burden so heavy. Please forgive us.” Moses replied, “You are forgiven.”

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1 The Torah: A Women’s Commentary, ed. Dr. Tamara Cohn Eskenazi and Rabbi Andrea L. Weiss, PhD (New York: Women of Reform Judaism, URJ Press, 2008), pp. 1263–64, 1273.
Again, a divine voice came forth: “The moment has come for you to depart from this world.” Moses replied, “Blessed be His Name! May He live and endure forever and ever!” Then he said to Israel, “I implore you, when you enter the Land, remember me and my bones, and say, ‘Alas for the son of Amram, who had run before us like a horse, yet his bones fell in the wilderness.’”

Again, a divine voice came forth and said, “Within half a moment you are to depart from the world.”

Moses lifted both his arms, placed them over his heart, and called out to Israel, “Behold the end of flesh and blood.” Moses arose and washed his hands and feet, and thus became as pure as a seraphim.

Then, from the highest heaven of heavens, the Holy One came down to take the soul of Moses, and with Him the three ministering angels, Michael, Gabriel, and Zagzagel. Michael laid out his bier, Gabriel spread a fine linen cloth at his head, while Zagzagel spread it at his feet. Michael stood at one side and Gabriel at the other. Then the Holy One said to Moses, “Moses, close your eyes,” and he closed his eyes. “Put your arms over your breast,” and he put his arms over his breast. “Bring your legs together,” and he brought his legs together….

In that instant, the Holy One kissed Moses, and took his soul with that kiss.

At that, God wept along with the heavens, the earth, the ministering angels and all of Israel.

Questions for Discussion:

1. What does Moses request of God?

2. How do you imagine Moses is feeling? How does this compare with how we thought he was feeling in the passages from Deuteronomy?

3. How does God respond to and validate Moses’s feelings? What does God do? How does God ease Moses’s mind?

4. How do the Torah passages and midrashim of Moses’s goodbye to the Israelites help us understand the challenges of saying goodbye to our rabbi?

5. What do we need to do to as a congregation to get to that same place of acceptance?
**Discussion Guide: Case Studies on Saying Goodbye**

Overview: This exercise uses three case studies to highlight and explore some of the common themes and experiences of congregations as they prepare to say goodbye to a departing 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 departure of a congregation’s rabbi, including their own reactions
- Identify both guiding principles and concrete actions that can help their congregation say “a good goodbye” 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 anything you notice about themes that were shared by participants (such as patterns, themes, or tensions).

3. Discussion of Case Studies

- Facilitate a group discussion of the cases, using the questions below 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 say “a good goodbye,” 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 other 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?
- Which of these feelings, if any, might be hard or uncomfortable for you?
- What are some ways to allow people to communicate these feelings?
- What resources do we have or do you need to help this happen?
- Do you have leadership in place to help with transition?
- What do the congregations in the case studies most need from its leadership?
- What does our congregation need from us?

4. Reflection

- 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 Goodbye

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

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

Anshe Tikvah: A Founding Rabbi Retires

Rabbi Noa Zinder began her rabbinic career as an assistant and then associate rabbi at a large, prestigious east coast congregation. In 1989, the pull of returning to family in the Midwest led her to accept a position at a small, young congregation in a growing suburb of Chicago, Anshe Tikvah. Prior to Rabbi Zinder’s arrival, the congregation was so small that they were using student rabbis from Hebrew Union College–Jewish Institute of Religion on a very part-time basis for the congregation’s spiritual leadership. Rabbi Zinder was the congregation’s first ordained, full-time resident rabbi. During Rabbi Zinder’s tenure, Anshe Tikvah grew substantially. There was a true sense of partnership and trust between the congregation and rabbi.

Saying Goodbye

Eighteen months before it was to occur, Rabbi Zinder announced her upcoming retirement. The congregation was informed in a mailing to the congregation that included letters from both Rabbi Zinder and the president of Anshe Tikvah, Mel Cohen, announcing her decision. No one was particularly surprised by the announcement, considering the rabbi’s age. But knowing that she was still quite energetic and vibrant, many members had hoped she would stay for at least another five years or so.

Indeed, congregants were very sad to hear the news. The families with multiple children spanning the religious school and post-b’nei mitzvah program were concerned to hear that the rabbi who officiated at an older child’s bar/bat mitzvah was retiring before their younger child came of age. Longtime members were very anxious knowing that the only rabbi many of them had known their entire adult lives would no longer be there for their moments of happiness and sadness. Some newer members, knowing how integral the rabbi was to everything that went on at Anshe Tikvah, wondered who could fill the void created by her upcoming departure.

Now, as the retirement was growing closer, Rabbi Zinder began to share her plans. She was very excited to have found a contact in the cruise ship industry. Although she planned to continue to live in the community, she was looking forward to the opportunity to “see the world” in retirement. She was able to secure a High Holy Day pulpit near the home of one of her adult children. She also looked forward to continuing to play an active role in the Jewish Genealogical Society, attending conferences and speaking both locally and across the Midwest.

Throughout her tenure as a rabbi, annual contributions to the Reform Pension Board had been made at the recommended levels by both the congregation and the rabbi. After her children were grown and no longer required support, the rabbi was able to increase the percentage of her own pension contributions to the fund as well.

Emeritus Rabbi Policy

Anshe Tikvah’s leadership has always been very thoughtful in the creation of policies. The rabbi was integrally involved in the exploration of policies such as the role of the non-Jew in the synagogue, food-related guidelines having to do with both Jewish and eco-friendly issues, and requirements for becoming bar/bat mitzvah at Anshe Tikvah. After the rabbi announced her retirement, a team was formed to create an emeritus rabbi policy. After all, they had never had an emeritus rabbi before! The rabbi was asked her thoughts on what she would like to see included in the policy. She suggested that emeritus rabbis and their immediate family members be granted a life membership at Anshe Tikvah and that when an emeritus rabbi died, a plaque in his or her name be placed on the yahrzeit board (or whatever form of remembrance instrument was then in use in the congregation) and that their name be included on the Kaddish list read on the anniversary of their death, so long as the reading of the Kaddish list was still a custom at Anshe Tikvah. She also
asked that, while it remained the custom at Anshe Tikvah to include the rabbi and board member names on temple stationery, the emeritus rabbi’s name be included at the bottom of the list (in her case, with the title “rabbi emerita”). Working with guidelines from the Reform Movement and sample policies from other congregations, the team fashioned a policy that everyone believed provided honor to their beloved, longtime rabbi, while also providing a thoughtful outline for the appropriate role of the emeritus rabbi and a clear path for the passing of the rabbinic leadership mantle from retiring rabbi to successor. The board of trustees voted unanimously to accept the policy, immediately after which they voted unanimously to grant Rabbi Zinder the title of “rabbi emerita” upon her retirement.

**Teams**

Meanwhile, two very important teams were formed to address Rabbi Zinder’s upcoming retirement: a search team to undertake the search for a next settled rabbi and a transition team to help the congregation through the process of transitioning from one rabbi to the next.

Mel reached out to the Central Conference of American Rabbis Placement Office regarding the upcoming rabbinic search, before the search team was formed. It was suggested that Anshe Tikvah consider hiring an interim rabbi for the year after Rabbi Zinder’s retirement. A team was assembled to explore this idea and report back to the board of trustees with a recommendation. Depending on the recommendation of this team, the search team that was to be assembled would be tasked with the search for an interim rabbi or a “settled” (permanent) rabbi.

Mel began the process of assembling names of people for the search team and the transition team. He had very good ideas of who he wanted to name as the chairs of each team. He also realized the importance of making sure that all of the membership cohorts in the congregation (e.g. founding members, young families, empty nesters, sisterhood and brotherhood, Torah study cohort) be represented on each team. While the search team would be looking for the next settled rabbi, the transition team would be a much longer endeavor, requiring people who were interested in overseeing the ways that the congregation said goodbye to Rabbi Zinder and hello to the next settled rabbi. The decision was made to create a small steering team for the transition team and to pull in people from different cohorts for the varied aspects of the transition, particularly saying goodbye to Rabbi Zinder, hello to the next settled rabbi, and the important task of making sure that members, especially long-term members, remain engaged and involved and didn’t decide to use the rabbi’s retirement as an excuse for themselves to “retire” from the synagogue. Mel realized that transition begins well before the next settled rabbi is hired and extends through at least the first year with the new settled rabbi. Whereas the search team members would be focused on finding the next settled rabbi, the transition team members would need to focus on the entire span of saying goodbye to one rabbi and hello to another.

**Reaching Out to the Staff**

Meanwhile, Mel asked Rabbi Zinder if he could attend an upcoming staff meeting to discuss her announcement with them. He knew that the staff, although primarily part-time, had worked very closely with the rabbi for many years. Even with their part-time schedules, Rabbi Zinder worked hard to create a team that met regularly, and she was clearly the team leader. Mel wanted to make sure that these “senior” staff members were aware that although it would not be appropriate for any of them to serve on the search team, their input and wisdom would be critical both for finding the right rabbi and for the ultimate success of that rabbi. He also knew that their commitment to the process was going to be critical to an interim rabbinic presence, if the decision was made to go that route. Mel wanted to both hear their concerns and share the process with them. He asked Rabbi Zinder if he could meet with the staff periodically through the coming months to update them on the process, hear their concerns and comments, and understand their sense of the “pulse” of the congregation. Rabbi Zinder readily agreed.
The Goodbye Gala

Once the transition team chairs were chosen, they went about assembling a sub-team that was tasked with planning a goodbye gala dinner in the spring preceding Rabbi Zinder’s retirement. There was a consensus on the board that this dinner could serve as an opportunity to kick off an endowment program, named after Rabbi Zinder.

After months of work, the gala team unveiled its plans to the congregation. Immediately, there was grumbling among some congregants. The basic dinner cost was more expensive than any previous event organized by the synagogue. The sponsorship levels, too, represented a level of giving that was far beyond anything that the congregation had previously planned.

Mel called a small meeting with the vice presidents of finance and membership, the transition team chair, and gala team members. Meanwhile, he asked the transition chair to reach out to a couple of the members who were the most negative about the gala to explore their concerns more fully. These concerns were brought to the meeting.

At the meeting, it was agreed to continue to move forward with the gala as planned, but there was also the realization that there needed to be other avenues for saying goodbye publicly to Rabbi Zinder, for those unable to attend the gala.

Rabbi Zinder’s goodbye “gala” was extended into a weekend of activities: a Friday night Shabbat service, to which local officials would be invited and asked to present her with proclamations of thanks and congratulations, and at which she would be bestowed with her “rabbi emerita” designation, a Shabbat morning study session to which local clergy would be invited to provide commentary on the week’s Torah portion in light of their close bonds with Rabbi Zinder, the Saturday night gala, and a Sunday “fun day” in honor of Rabbi Zinder—a low-cost affair in the local park for families.

Office Hours with the Rabbi

Rabbi Zinder came up with the idea to hold special office hours over the final six weeks of her tenure. As Rabbi Zinder was packing up her office and putting her files in order (deciding what needed to stay with the synagogue for her successor to rely upon and what were her personal papers), she also offered fifteen-minute and half-hour slots for congregants to come in to say personal goodbyes to her. Many of these were very poignant, as families came in with handmade gifts, remembrances of their time together. Rabbi Zinder also made a list of homebound congregants. This list had a dual purpose—as Rabbi Zinder went to the homes of congregants to say goodbye, she also was creating an up-to-date list of homebound members for her successor.
Case 2
Temple Beit Ahavah: Rabbi Leaves for a Larger Congregation

Rabbi Zach Tzion had come to Temple Beit Ahavah (TBA) twelve years before, just three years out of rabbinical school. When Rabbi Tzion first came to TBA, it was an aging congregation with very few young families. The longtime rabbi before Rabbi Tzion was beloved, but the congregation had aged along with him. The congregation had felt very positive about having brought in an interim rabbi before the hiring of Rabbi Tzion, as it gave them the opportunity to really think about who they were as a community, who they wanted to be, and what skills and interests they were looking for in their next settled rabbi.

Rabbi Tzion's arrival brought new vibrancy to the temple. During Rabbi Tzion's tenure, TBA was successful in attracting younger families. TBA became a thriving, multigenerational synagogue with many adult learning and social activities, a vibrant religious school, and the beginnings of a meaningful engagement program for the growing post-b'nei mitzvah cohort. Longtime members had watched their barely 250-family congregation grow to nearly 400 families since Rabbi Tzion's arrival.

Longtime congregants felt that Rabbi Tzion had “grown up” with them, and they reveled in the growth of his pastoral skills and sermonic messages. The rabbi took professional development very seriously, and the leadership of TBA had provided financial support through the annual budget for Rabbi Tzion to attend conferences and workshops to further his rabbinic, managerial, and fundraising skills. No matter what age, members of TBA felt close to Rabbi Tzion: children and their parents felt that he had a clear understanding of their needs, the empty nesters liked the fact that he always had a smile on his face and that the adult learning component had grown stronger under his vision, and the elderly were particularly touched by his pastoral abilities and the fact that he seemed “wise beyond his years.”

The rabbi came to TBA as a young married man. Longtime congregants watched as his family grew with the addition of two sons and a daughter. The entire congregation was invited to the children's b'rit milah and b'rit bat ceremonies, and the members felt an affinity with the rabbi's family. Older congregants whose own grandchildren lived out of state “adopted” the rabbi’s children as their own in-town grandchildren. It was a win-win for the rabbi's family, since all of his children's grandparents lived out of state and were unable to visit often. His children attended school and were friends with many of the children in the congregation.

Announcing a Departure

A year before his contract was up for renewal, Rabbi Tzion approached the president of TBA, Heidi Levine, to let her know that he did not plan to renew his contract. As much as he and his family loved TBA, he explained that he and his wife had been discussing their future. He felt the urge to use the knowledge and skills that he had gained at TBA to be the rabbi in a larger, more-complex synagogue structure with the kind of budget and staff resources that TBA couldn't offer as a four-hundred-family congregation. He informed Heidi of his plan to enter into rabbinic placement in the coming year. He explained to Heidi that he already knew of a few large congregations where the rabbi was retiring, and it felt like good timing for him to make this decision at this time: his current contract was ending, and the move would coincide with his oldest child entering into middle school.

What he didn't share with Heidi were his frustrations. As the congregation's membership and budget had grown, the staffing, policies, and procedures had not kept up with the best principles for a congregation of their “new” size. Nevertheless, the rabbi realized that there was much that he, his wife, and certainly his children would miss about TBA. At the following week's board meeting, Heidi announced Rabbi Tzion's decision to the board, and the rabbi followed up with a few words of his own. The rabbi and president had each written a letter for the congregation—Rabbi Tzion on behalf of himself and his family, and Heidi on behalf of the leadership. The letters were shared with the board members,
and they were asked to not mention anything to their families about this announcement when they got home that night. The letters were being sent out the following day by e-mail and snail mail, and it was important that members of the congregation receive the news at the same time.

Taking Stock

A discussion ensued at the board meeting about whether they should hire an interim rabbi again, as they did before the hiring of Rabbi Tzion. Rabbi Tzion used this discussion as an opportunity to suggest that this would be a good idea, especially given the growth in the congregation over the past twelve years, its changing demographics, and the changing Jewish world. This rabbincic change could serve as an opportunity to envision the next stage in the congregation’s life.

What is the “why” of Temple Beit Ahavah? What role does the synagogue play, and what does it provide for the local Jewish community, larger religious community, and even larger “communities” that its members inhabit? What has been both positive and problematic about the growth that they have experienced, and how has it changed who they are and how they understand themselves as a community? And finally, what does all of this say about funding, staffing, and facilities needs going forward? The board agreed to make this a focus of the next month’s board meeting, and Heidi taskled the president-elect, Hal Ervin, to reach out to the Central Conference of American Rabbis and Union for Reform Judaism for resources and advice. Hal agreed to be prepared to report back to the board the following month.

A Multitude of Reactions

The next day, as people opened their e-mails and received word of the upcoming departure of Rabbi Tzion, Heidi began to receive calls from members interested in serving on the rabbinic search team. Heidi patiently responded to everyone who contacted her, noting that there would be many opportunities for members to participate in the upcoming transition and multiple opportunities for voices to be heard. She carefully noted each call, who it was from, and a short summary of it. Rabbi Tzion received many calls as well. Some people wished him well, others asked “the real story” behind his departure, and still others called begging him to stay. Some of the families with children in the religious school were particularly concerned about Rabbi Tzion’s departure. They came to the synagogue because of this dynamic young rabbi. Their children were becoming bar/bat mitzvah in the next few years. Their emotions ranged from anger to disbelief to concern for who would follow Rabbi Tzion. Rabbi Tzion reminded those who reached out to him that TBA is their spiritual home. As such, it is much greater than any one person, even a rabbi, and he reminded congregants of the strong relationships they had built not only with him, but with each other and other staff members. He told members who threatened to leave that the greatest departing gift that they could give to him was to stay involved and continue the work of building this wonderful community.

Rabbi Tzion shared with Heidi the wide range of calls that he received. She asked him to keep careful track of the names of people who were calling. He was resistant to share the names with her, concerned that it would be a breach of rabbincic confidentiality, but as Heidi reminded him, it was going to be important for the transition team to know how the different cohorts in the congregation were reacting to the news so that they could be supported and engaged. She asked him, if he was not willing to write down a particular name, to please make note of the “cohort” to which they belonged (e.g., religious school family, empty nester, Torah study circle participant).

Exit Interview

In February, Rabbi Tzion announced to the congregation that he had been invited to become the senior rabbi of a large and prestigious synagogue in the city in which his parents-in-law resided. He again thanked the TBA community for their love, support, and care and noted that the greatest departing gift that they could give him would be the continued strengthening of this congregation that would always mean so much to him and his family.
In the meantime, Rabbi Tzion continued to push Heidi to put together a small group composed of Heidi, the president-elect, and the immediate past president to do an exit interview with him before he left. He realized that the time was going to go by very quickly. Already, the leadership’s thoughts and energies were beginning to switch to welcoming their interim rabbi. (The decision had, indeed, been made to go into an interim placement, and they were in the process of writing a contract with their interim rabbinic candidate.)

A date was set for the exit interview and a process decided upon based on materials provided by the URJ. Rabbi Tzion thought carefully about what he wanted to share in the interview, hoping that his thoughts would be shared not only with the lay leadership, but with the interim rabbi and, eventually, the congregation’s new settled rabbi. He loved this congregation, but it was a very different congregation from the one that he had entered twelve years ago, and the larger world, too, was very different. He knew that the coming year with the interim rabbi offered an opportunity for charting a course forward that might not lead to the growth in traditional membership numbers that was experienced during his tenure, but could very well lead to a growth in engagement and communal involvement that would bode well for the future of the congregation.
Case 3

Beth Chayim: Rabbi in Large Congregation Retiring

Rabbi Steven Spiegel had been the senior rabbi at Beth Chayim for sixteen years. He entered the large, prestigious urban congregation following some difficult years at Beth Chayim, bringing back a sense of stability while overseeing the ongoing revitalization of the congregation's schools, adult learning, and community outreach programming. Rabbi Spiegel and his wife, Elise, had just become the proud grandparents to their first grandchild. Unfortunately, both of their children married spouses whose careers took them out of the area. With his busy schedule, Rabbi Spiegel was not able to spend the time he wished to with his baby granddaughter. He was planning to continue living in the community, but he and Elise, who was retiring as well, were looking forward to the opportunity to come and go as they pleased.

Letters to the Congregation

Joint letters were sent to the congregation from the rabbi and president, announcing Rabbi Spiegel's upcoming retirement. In his letter, president Josh Klein reminded the congregation that they were putting the finishing touches on a strategic plan. Josh had spearheaded the process when he became the president-elect, anticipating that the rabbi was going to retire, quite possibly during his presidency. The process that they undertook in creating the plan included listening groups and a carefully designed survey that, taken together, boasted nearly 70 percent membership participation. Entitled Kadimah (“forward” in Hebrew), the process focused on getting a clearer sense of membership interests and creating opportunities for further engagement and growth. It also included a careful analysis of current and future staffing needs, based on the findings generated by the process. Staffing recommendations from the report included the hiring of a part-time development director to oversee the growth of BC’s endowment fund, currently at $3.5 million, and a full-time engagement professional. In his letter, Josh reminded the membership that the information gained through this process would be critical as they shaped the application for their next settled rabbi. Rabbi Spiegel's letter noted that although he and his wife would continue living in the area, it was important that the entire congregation realized that someone else would be taking on the mantle of rabbinic leadership when he retired. In the meantime, the rabbi noted, there were exciting initiatives over the coming year and a half that he was excited to see come to fruition, reminding the congregation that he had no interest in being a “lame-duck” rabbi.

The Neutral Zone

Even though Rabbi Spiegel made it very clear in his letter to the congregation that he had no intention of being a “lame-duck” rabbi, it clearly became apparent that congregants had that concern. Almost immediately, Josh received e-mails from congregants demanding that Beth Chayim's associate rabbi, Sheila Cohen, immediately be named the next senior rabbi. Surprisingly to Josh, he also received one letter voicing concern about Rabbi Cohen's ability to, in the words of the writer, "step into the very large shoes of Rabbi Spiegel."

At the following month's board meeting, the rabbi's upcoming retirement was slated as a topic of discussion. Josh shared that he had accessed resources on rabbinic transition and search from the Union for Reform Judaism and the Central Conference of American Rabbis. Both organizations strongly recommended that there be a rabbinic search process, even if the associate rabbi appeared to be a very strong, or even the best, candidate for the position. At the meeting, the board discussed the possibility of an interim rabbi. The decision was made to go into a search for a permanent rabbi immediately. The reasons for this were the strong, stable, and large senior staff leadership in place, the visioning work already accomplished through the Kadimah process, the strong internal candidate in Rabbi Cohen, and the seventeen months still remaining to mount their rabbinic search process. Also discussed but quickly rejected were the voices suggesting the immediate naming of Rabbi Cohen as Rabbi Spiegel's successor-designate, as well as the idea of not

Union for Reform Judaism
participating in an open search process through the Reform Movement’s rabbinical placement process and just naming Rabbi Cohen to the position of senior rabbi. It was agreed that not only would this not be fair to the congregation, but it also would not be fair to Rabbi Cohen, who deserved the opportunity to be named the senior rabbi only after she was deemed to be the best candidate for the position through a thoughtful and thorough search process.

The decision was also made at the board meeting to create a webpage specifically related to the rabbinic transition. The first two documents that would be put up on the page were the letters from Josh and Rabbi Spiegel announcing the upcoming retirement. It was agreed that when the Kadimah report was released, in addition to sending the web link to the report to every congregational family, the link would also be placed on the rabbinic search transition page. A member of the board also noted that this was a good time to take a look at all of the congregation’s “outward facing” communication vehicles (webpage, Facebook page, video channel, etc.) to make sure that they were up-to-date and provided a good “look.” Candidates for the rabbinic position would be looking at all of these media. A few people shook their heads, wondering why it was taking an upcoming rabbinic search as a reminder of something that needed to be done regularly, given the monthly traffic on these sites.

A motion was passed at the board meeting, tasking Josh with the creation of a rabbinic search team and a team to oversee helping the congregation through the rabbinic transition process. The transition team would be given two immediate tasks: preparing the celebrations around Rabbi Spiegel’s retirement and “taking the pulse” of the congregation with respect to concerns around the upcoming transition. The transition team was also co-tasked with the search team to maintain the rabbinic transition webpage and to make sure that the community would be kept apprised at least monthly about the search and transition processes. Rabbi Spiegel urged the board to use his upcoming retirement as a fund development opportunity and offered his full support and participation in raising money for the endowment fund.

**High Holy Days**

The next months flew by very quickly. Suddenly, the clergy team was beginning their preparations for Rabbi Spiegel’s last High Holy Days as senior rabbi at Beth Chayim. They discussed setting the “right” tone between an acknowledgment that this was Rabbi Spiegel’s last High Holy Days as the senior rabbi at Beth Chayim and not wanting this to be a goodbye to Rabbi Spiegel, with nine months left on the calendar until he retired.

Rabbi Spiegel himself was adamant about not wanting this to be at all about his upcoming retirement. As usual, he crafted his sermons over the summer. Although they were not about his retirement per se, he realized that on some level he couldn’t help but send a message about his leave-taking with the themes upon which he settled.

Indeed, after the conclusion of the holidays, many congregants who had known Rabbi Spiegel for many years remarked to him that he clearly wrote these sermons as a means to take stock of his rabbinate. The themes were meaningful, poignant, and gripping as ever, but they were clearly spoken by a man who was taking stock of his own life and imparting life lessons to his congregation.

**Leading the Staff Through Transition**

Mark Levy was the young, dynamic executive director at Beth Chayim. Since he came to the congregation five years before, many policies and procedures had been updated at his urging, and his leadership was integral to everything administrative and operational that occurred in the synagogue.

Mark immediately reached out to the URJ and CCAR to connect the lay leadership with these Reform Movement institutions. Mark realized that it was not appropriate for him or any other staff member to serve on the search team for the next settled rabbi, but he also knew that his leadership was going to be necessary, particularly with respect to the transition itself.
Soon after Rabbi Spiegel's announcement, Mark suggested at a weekly senior staff meeting that the upcoming rabbinic transition be added to the weekly agenda. The other staff members readily agreed. Mark realized that in addition to his ongoing responsibilities and his responsibilities with respect to the transition itself, he was also going to be an important conduit and connector among the staff, board, and transition team.

**Endowment Fund Development Opportunities**

Temple Beth Chayim’s endowment team was quickly brought into the conversations around Rabbi Spiegel’s upcoming retirement. Rabbi Spiegel made it clear that he wanted to use his upcoming retirement as an opportunity for fund development, and obviously his involvement would be central to any endowment campaign surrounding his retirement.

A discussion ensued about whether to rename the endowment fund in Rabbi Spiegel’s name or to create a special fund in his name within the endowment. Rabbi Spiegel suggested that the money be raised toward “naming” the senior rabbi position as an endowed chair, similar to an endowed chair in a university setting. Rabbi Spiegel was committed to one of his main foci in the final months of his active rabbinate being to help strengthen Beth Chayim for the future, as others had strengthened it in the past.