Mutual Review
Building and Nurturing a Sacred Partnership between Rabbi and Congregation

CREATED BY THE UNION FOR REFORM JUDAISM
AND THE CENTRAL CONFERENCE OF AMERICAN RABBIS
Shirley B. Gordon, URJ North American Board, former co-chair NCRCR
Rabbi Alan Henkin, Placement Director Emeritus, CCAR
Lisa Lieberman Barzilai, RJE, Director, Leadership Institute, URJ
Rabbi Janet Offel, Director, Consulting and Transition Management, URJ

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INTRODUCTION

When two people sit together and there are words of Torah between them, the Shechinah [Divine Presence] dwells among them.

—Pirkei Avot 3:2

A sacred partnership is a commitment to building and nurturing relationships that elevate the work of leadership to a level of holiness. Sacred partnerships recognize each of us as individuals and our desire to inspire sacred action in our communities.

Sacred partnerships are built and nurtured through the Jewish values of mutual respect, trust, honesty, listening and communication, transparency, confidentiality, flexibility, reflection, empathy, and vulnerability.¹

All healthy and vibrant congregations are reflective by nature and are built upon sacred partnerships. Lay leadership understands and values the complexities of the role of the rabbi and the rabbi’s personal needs. The rabbi understands and values that lay leaders give of their discretionary time to serve the congregational community and that they need to attend to their primary work and personal needs.

Judaism is no stranger to communal and individual self-analysis. Our tradition sets aside ten days every year for introspection and self-scrutiny toward ongoing personal improvement. Culminating on Yom Kippur, these Ten Days of Awe call upon us annually to identify the ways in which we can make our lives, our relationships, and our communities better. Mutual review of clergy and volunteer leadership is consistent with Judaism’s insistence on self-examination and provides the means by which Jews hold one another accountable. Professional and lay leaders are partners in carrying out the synagogue’s work. A mutual review is an opportunity for helping the entire congregation, including the professional staff and the board, to better accomplish the synagogue’s mission, vision, values, and goals. Review includes thoughtful and intentional discussion of balancing the immediate needs of the congregation while discerning plans for the future. Mutual review sets the direction for leadership development, for both lay leadership and professionals, identifying areas of strengths, challenges, and areas for essential growth. Review encourages exploration, discovery, and experimentation. This requires the commitment of everyone in the process, as an effective review process in the congregation is mutual, done with the rabbi, not to the rabbi.

The goal of a review process is to strengthen relationships and lines of communication and maintain a focus on the congregation’s mission, vision, and values. Too often a review process is seen as unidirectional and, at times, adversarial, leading to statements such as the following: “My synagogue president wants to conduct an evaluation of my rabbinate by sending a SurveyMonkey questionnaire to all the congregants.” “We are not sure how to give our clergy team good feedback on their work. Any ideas?” “We used the employee evaluation form from my office on the rabbi, and it didn’t work.” Because of comments like these and the

changing nature of congregational communities, the Union for Reform Judaism and the Central
Conference of American Rabbis created a task force to consider how synagogue communities
could best undertake a review process with their professional partners. The last time such an
effort was undertaken was in January 1992 under the auspices of the National Commission on
Rabbinic Congregational Relations (NCRCR), which resulted in “The NCRCR Guidelines for
Ongoing Mutual Review in the Synagogue.” In the intervening twenty-seven years, numerous
books and articles have appeared, advancing our understanding of clergy reviews.

One of the things that we do know from countless conversations with rabbis and
congregational lay leaders is that a badly managed review process is not in anyone’s best
interest. The rabbinate is both a profession and a vocation. Rabbis are focused day in and day
out on the needs of their congregation and its members. Lay leaders are volunteers who give
of their own time and expertise to their synagogue community, amidst many other competing
priorities— their families, professional lives, and other volunteer activities, to name just a few.
It is important to remember that a badly managed review process, due to lack of time and/
or an inability to undertake a thoughtful and meaningful process, might be more detrimental
than helpful, not only to the rabbi’s own professional and vocational growth but to the
congregation’s future growth and vitality. There is no simple formula for doing a review: a well
thought-out and healthy process takes time and a high level of mutual respect, consistency, and
engagement. Implementing a successful review process requires a high level of reflection and
thoughtfulness on everyone’s part. The reward for undertaking this work of a well-designed
mutual review process is a valuable experience in the successful attainment of congregational
aspirations and can result in new insights, new goals and directions, and the exploration of the
sacred partnership between synagogue professional and lay leaders that is integral to a healthy
congregational system. (See Appendix A for best principles, and Appendix B for best practices
and stumbling blocks to avoid that can be applied to any review process.)

Review is an ongoing process with periodic conversation, not only conducted at the time of
contract renewal, to identify areas of strength and improvement of the professional staff, board,
and congregation. (For the relationship between review and renewal, see Appendix G.) Review
can be a vehicle for community building and ought not be a means for division and rancor.
It should be approached with the notion that this is a positive step for both the rabbi and the
community and a means for continued community and relationship building. After all, if
synagogues are, among other things, learning communities, what better place to start than to
learn about the synagogue and each other?

In the following pages, we lay out our three-year initiative to produce twenty-first-century
review guidelines for twenty-first-century rabbinites in twenty-first-century synagogues. We
share with you our operating principles and definitions and offer several examples of reviews,
each reflecting a different approach. Finally, we explicate our belief that meaningful review is at
the heart of everything that a healthy, vibrant synagogue community does.2

May God bless all the deeds of our hands.

2Appendix C provides an understanding of terms used in this resource.
Touchpoints for Review Process

• In consultation with the rabbi, invite members to be part of the mutual review committee. (For ideas of qualities to look for when choosing members, see appendix D.)

• Together the review committee and rabbi determine which of the three recommended processes will be used for the coming year.

• Set meeting dates for the year that everyone agrees to keep as permanent unless there is a real conflict that arises (we recommend three to four meetings for the year).

• Healthy congregations have a regularly scheduled review process in place that is framed by Jewish values and sacred partnerships. Opening the review sessions with a blessing and text study is recommended, reminding us all that we are engaged in sacred work.

• If applicable, have the rabbi write a review of the previous year’s goals established and the accomplishments and challenges with achieving these goals.

• First meeting: If applicable, go over the rabbi’s review of the previous year. Begin to develop the goals for the upcoming year, or establish the conversation for formative review.

• Each subsequent meeting should have a set agenda based on the review process established for the year.
Introduction to Sample Review Tools

Broadly speaking, clergy reviews are divided into two categories: summative and formative. The terms “summative” and “formative” were created by Michael Scriven in 1967 to emphasize the different kinds of information that might be gathered in a review. A summative review seeks to assess performance and skills and to measure progress toward the achievement of agreed-upon goals. A formative review assesses the quality of the relationships at work in a synagogue system in order to build healthy congregations. The best volume on the application of formative reviews to the clergy is Jill Hudson’s *When Better Isn’t Enough: Evaluation Tools for the 21st-Century Church*. (For further reading about review, see appendix H.)

**SUMMATIVE REVIEW**

In the life of a synagogue or a rabbinate, there are times when a summative review is indicated and times when a formative review is indicated.

A summative review is most useful when:

- A rabbi has a specific portfolio (e.g., the youth program or outreach to young adults).
- The synagogue has a specific outcome that it is trying to achieve (e.g., an endowment campaign).
- It is helpful to clarify the respective responsibilities of the clergy and the volunteers in working toward a particular outcome.
- The synagogue is experiencing rapid change in membership and leadership, and the transition has to be carefully directed.

In these situations, a summative approach to review can result in valuable management of the synagogue’s progress.

**FORMATIVE REVIEW**

A formative review is most useful when:

- The growth of the rabbi and the lay leaders is the intended outcome.
- The alignment of the rabbi and the lay leaders on the synagogue’s mission, vision, and goals is explored.
- No major decisions (e.g., contractual relations, promotions, salary increase) have to be made.
- Formal goal-setting is foreign to a synagogue’s culture.
• A professional’s role in the synagogue is relational, which is typical in many small congregations.
• A synagogue has achieved many goals in a short period of time and wants to assess itself.
• A successful and beloved synagogue professional has served the congregation for decades.

While not every review should be formative, there are many times in a synagogue’s history and in a professional’s career when a formative review will yield transformative information.

**BLENDED REVIEW**

There is also a third process, the blended review. Many experts on clergy review argue that a combination of summative and formative factors works best. For example, in 1995 C. Jeff Woods wrote in his book *User Friendly Evaluation*, “A group conducting pastoral evaluation should spend 90 percent of its effort on formative evaluation.” This proportion of 90 percent formative and 10 percent summative derives from the assumption that in church and synagogue life, it is more important to attend to the sacred partnership between clergy and lay leaders than to the achievement of elusive, unquantifiable goals.

Below we share three models of review: formative, summative, and blended. We share these as examples, not as hard-and-fast, immutable documents. We believe that when it comes to reviews, one size does not fit all or, as one writer put it, one size only fits one. Struggling with the creation of your own review process is an important part of the process itself.
Formative Review

A formative review is unlike a summative review in that it focuses more on qualitative feedback than on outcomes and goals. This type of review is dramatically different from summative reviews. Yet whenever we ask questions such as “Can we talk about what just happened?” or “How are we doing together?” we are engaging in informal formative review.

Every good review begins with a question: What do we want to learn from this review? If the answers include the following, then we are in the realm of formative reviews:

- How we can be better leaders for our community
- How well we volunteer leaders and professional leaders are working together
- What assumptions we share and don’t share about our community
- How we can improve the volunteer and professional leadership that we are providing our community

Notice that these are questions and answers that do not depend on progress toward goals, quantitative measurements, or statistical analysis. Rather, they are intended to explore understandings, to discuss relationships, and to arrive at insights into the web of relationships that drive synagogue life. Through dialogue and reflection, a formative review can facilitate the realization of new aspirations, the identification of areas of growth, and the articulation of discrepancies between the professional’s and the lay leaders’ understanding of the community. As with everything that happens between and among leaders of a congregation, a formative review should be undertaken with the utmost care for the sacred partnership. A positive formative review process strengthens individuals, relationships, and the congregation.

Below you will find a formative review that is structured by questions pertaining to the rabbi or synagogue professional and questions pertaining to both the rabbi and lay leaders. Some of these proposed questions might fit your synagogue. Others might be irrelevant and useless. This list is by no means exhaustive; it is meant to be suggestive. In your congregation you can formulate areas of conversation that are unique to your situation. (See Appendix E for more examples of formative review questions.)

**REFLECTIONS ON THE RABBI**

1. **For the Rabbi:** In what ways do I attend to my religious life? Regular study? Worship or meditation?

   **For Lay Leaders:** In what ways does our rabbi attend to his/her religious life? Regular study? Worship or meditation?
2. **For the Rabbi:** In what areas of rabbinic activity do I feel especially competent? In what areas do I want to deepen my competence?

   **For Lay Leaders:** In what areas of rabbinic activity is our rabbi especially competent? In what areas do we want our rabbi to deepen his/her competence?

3. **For the Rabbi:** In what ways do I give voice to social justice in the synagogue, the Reform Movement, and the community?

   **For Lay Leaders:** In what ways does our rabbi give voice to social justice, and in what ways do we support that?

4. **For the Rabbi:** How attentive am I to my health needs (nutrition, work, and play), and how well do I observe my day off and take my vacation time?

   **For Lay Leaders:** How do we support our rabbi in his/her efforts to take care of health needs, to observe a day off, and to take vacation?

5. **For the Rabbi:** In what ways have I worked to make our Shabbat and holiday worship meaningful for those who attend?

   **For Lay Leaders:** In what ways have we encouraged and supported our rabbi in making our worship meaningful for those who attend?

**REFLECTIONS ON RABBI AND LAY LEADERS TOGETHER**

1. **For the Rabbi:** What are the working assumptions about our synagogue that I hold, especially regarding worship, learning, and social justice?

   **For Lay Leaders:** What are our working assumptions, and do they align with the rabbi’s?

2. **For the Rabbi:** In what ways do I honor the sacred partnership that I am in with my lay leaders?

   **For Lay Leaders:** How have we accorded our rabbi k’vod harav (respect/honor for the rabbi) as our partner in the sacred work of the synagogue?

3. **For the Rabbi:** What are three interesting things that I have learned about our synagogue recently?

   **For Lay Leaders:** What are three interesting things that we have learned about our synagogue recently?
4. **For the Rabbi:** What three insights have I had about our synagogue recently?

**For Lay Leaders:** What three insights have we had about our synagogue recently?

5. **For the Rabbi:** Am I self-aware in times of conflict? Do I handle feedback constructively?

**For Lay Leaders:** Are we as lay leaders self-aware in times of conflict? Do we handle feedback constructively?

6. **For the Rabbi:** In what ways do I enable and empower others through coaching, teaching, delegating, and collaborating to offer their skills to our synagogue community?

**For Lay Leaders:** In what ways do we enable and empower our members to offer their skills to our synagogue community?

7. **For the Rabbi:** In what ways have I contributed to building a healthy workplace, and in what ways have I encouraged my staff to use their strengths to benefit our community?

**For Lay Leaders:** In what ways have we nurtured new leadership in our synagogue, and in what ways have we cultivated a culture of collaboration on our board?
**Summative Review**

Any review process should be based within the framework of sacred partnerships. The Jewish values articulated in the definition should serve as the foundation in every step of the review.

This summative process is meant to serve as a framework for your congregation, with the understanding that every congregation is unique. Staffing structure, supervision, governance, and congregational size and culture all will impact how you organize this review process. When you choose to make adaptations, we hope that you take into account the principles laid out so that the fundamentals of the process remain.

Based upon the best principles articulated, we recommend this annual summative review (see Appendix A) that includes personal reflection, goal setting, and establishing strategies for which the rabbi will be responsible. Setting goals and strategies for the rabbi should reflect the agreed-upon rabbinic responsibilities. Each congregation has differing expectations of rabbinic roles and responsibilities. This process might also be a good time to review those responsibilities so that they reflect the true and realistic work of the position. Ultimately, a review process is about looking forward toward achieving priority goals and leading toward growth. While history is important, what is critical to the review process is looking ahead to the future rather than considering the past.

**PERSONAL REFLECTION**

Personal reflection provides the rabbi with the time and opportunity to look back at the past year to celebrate successes and address challenges. The reflection serves as both an ending and a starting point for a conversation with those on the review committee. The personal reflection allows the rabbi to close the prior review process and begin looking toward the future, setting new aspirations and goals for the upcoming year. The reflection can be done in a narrative format or can be bullet points.

At the end of this chapter there is a table template provided to assist with this work. If the personal reflection is done as a narrative, this should be done separately from the table. However, if the personal reflection is done as bullet points, a section can be added in the table template to aggregate the information into one place. We have also provided a guide for reflection, which offers questions for both the rabbi and the review committee.

**Questions for Personal Reflection for the Rabbi**

Reflection is not always simple to begin. Below are some questions that can serve as prompts for the review reflection process. This list is neither definitive nor exhaustive, but rather a potential starting point.
• What have been your major accomplishments this year? What are you most proud of? Most disappointed in?
• What goals did you set for yourself this past year? How successful were you in achieving those goals?
• What are the key aspects of your job that you find most motivating? Most frustrating?
• What actions (if any) have you undertaken to address the frustrations?
• How satisfied are you with the roles and responsibilities assigned to you in your position? Are they clearly identified?
• In what areas would you like more responsibility? Less responsibility?
• How well were you able to operate as part of a team this year? What enabled you to be successful? Were there hindrances, and if so, how were they manifest?
• What activities would you have liked to have focused on more but lacked the time to do so? Would these be aided by a reprioritization of your time and congregational resources?
• How clear are the congregation’s goals for you? Are they adequately addressed in discussions with the leadership?
• What do you see as the most important goals for the congregation next year?
• What goals and accomplishments would you like to achieve during the upcoming year?

GOAL SETTING

We recommend that there be both congregational professional goals and personal professional goals that the rabbi establishes in consultation with the review committee. This creates reasonable and jointly agreed-upon benchmarks for achievement, which allows for there to be specific areas in which the rabbi will be reviewed. No one person can or should be expected to be all things to all people and to be evaluated on minor details for all aspects of the position. It is our recommendation that these congregational goals have joint responsibility for success—sacred partners—the rabbi and lay leaders. There should also be the opportunity for the rabbi to set one or two personal professional goals that connect to an area of interest or passion that would benefit both the rabbi and congregation but are not necessarily specifically connected to a congregational goal. If the congregation has not yet set priority goals, we recommend two potential options. For the coming year, there can be mutually agreed-upon goals between the rabbi and the review committee that are connected to the support and advancement of the congregation. This is a first step toward creating congregational goals. The second approach is to use the formative review process found within this resource.
Follow these simple guidelines for crafting annual goals in partnership with the rabbi:

› Align individual goals with synagogue priorities.
› Make them SMART (see below).
› Focus on growth and change.
› Quantify the subjective.

If you are to set goals with benchmarks, we recommend that you use the SMART goal format. As you write goals, make them SMART—Specific, Measurable, Attainable, Relevant, and Time-bound.

Consider these examples of common pitfalls and how to transform statements into a SMART goal.

<table>
<thead>
<tr>
<th>Goal isn’t specific:</th>
<th>SMART:</th>
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| Be more warm and welcoming as a congregation. | **Rabbi:** Create a warmer and more inviting atmosphere by speaking with at least five people at the Oneg whom I have never met or have not spoken with in over two months.  
**Executive Director/Director of Education:** Create a warmer and more inviting atmosphere by developing a new onboarding protocol to welcome and get to know new members and their families and introduce them to the community.  
**Board Member:** Create a warmer and more inviting atmosphere by inviting one veteran and one new member (and family) to Shabbat dinner and attending services together once a month. |

<table>
<thead>
<tr>
<th>Goal isn’t measurable:</th>
<th>SMART:</th>
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| Improve member engagement. | **Rabbi:** For the next six months, invite at least five congregants monthly to lunch so I can learn about their Jewish journey and personal connection to our synagogue.  
**Program Director:** During the next six months, develop two new programs based on member interests to support their Jewish journey and to build personal connections to other members and to our synagogue.  
**Board Member:** For the next six months, invite at least two congregants monthly to coffee so I can learn about their Jewish journey and personal connection to our synagogue. |
**Goal isn’t attainable:**

<table>
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<tr>
<th>Role</th>
<th>Goal Description</th>
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<tbody>
<tr>
<td><strong>Rabbi</strong></td>
<td>Increase one-on-one conversations from ten a month to thirty a month.</td>
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<tr>
<td><strong>Cantor</strong></td>
<td>Increase <em>b’nei mitzvah</em> family meetings from once during the process to six times during the process.</td>
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<tr>
<td><strong>Board Member</strong></td>
<td>Attend Shabbat worship four times a month and at least three congregational functions each month.</td>
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**SMART:**

<table>
<thead>
<tr>
<th>Role</th>
<th>Goal Description</th>
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<tr>
<td><strong>Rabbi</strong></td>
<td>Increase one-on-one conversations from ten a month to seventeen a month.</td>
</tr>
<tr>
<td><strong>Cantor</strong></td>
<td>Increase <em>b’nei mitzvah</em> family meetings from once during the process to three times during the process.</td>
</tr>
<tr>
<td><strong>Board Member</strong></td>
<td>Attend Shabbat worship twice a month and at least one congregational function each month.</td>
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**NOTE:** **STRETCH!** Although goals should be achievable, it’s totally okay to set one or two goals that are a figurative stretch in order to push the outer limits of achievement. This will, however, require trust on the part of the rabbi and the review committee that if a stretch goal is not met, there is the understanding that the effort and movement toward the goal is still considered significant and worthwhile.

**SETTING STRATEGIES**

The rabbi and the review committee should determine not only the goals but the strategies that will be deployed to achieve these goals. SMART goals are a good example of how a strategy might be written. We recommend that these joint goals establish the rabbinic responsibilities and those of the lay leaders. This is to help both the rabbi and lay leaders see how their work coordinates or impacts that of the other.

The recommended template provides a framework to assist in the creation of the goals and strategies.

**TIMELINE**

The following process is recommended after the rabbi’s first year at the congregation:

- A start date should be established. You might choose the beginning of your fiscal year or the beginning of your programmatic year.
- The rabbi should be given a month (this should not take place just prior to or during the fall holiday season) to write the personal reflection on the previous year.
- Once the personal reflection is completed, it is reviewed with the review committee.
- The rabbi and review committee should create goals for the rabbi, including the strategies for successful achievement of these goals based upon the congregation’s goals or strategic priorities.
• Regularly scheduled meetings should be set for the rabbi and review committee to assess how things are going and to make adjustments as potentially necessary. Depending on who sits on the review committee, these meetings might happen monthly, while in other congregations they could happen quarterly or twice a year. However, to ensure that there is both trust and transparency in the review process, we do recommend that the review committee meet with the rabbi no less than twice a year, to allow for reflection and support.

• One month prior to the end of the annual cycle a formal conversation should take place, looking at the goals set and the achievement of those goals.

• At the end of the annual cycle the rabbi should once again begin the process of self-reflection.

### TEMPLATE FOR REVIEW

<table>
<thead>
<tr>
<th>Congregational goal</th>
<th>Action item</th>
<th>Subgoals for the board</th>
<th>Subgoals and strategies for the rabbi</th>
<th>Sacred partners (board members/committees/other professional staff)</th>
<th>Achievements</th>
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TEMPLATE FOR A CONVERSATION ABOUT THE GOALS

Finding the right flow for the scheduled conversations will take practice. Using the following structure can assist you in creating an agenda for your conversation.

• **Text study:**
  - This can be prepared by either the rabbi or someone on the personnel committee.
  - Starting with text study helps to create the important sacred space for the upcoming conversation.
  - The discussion should be brief but meaningful and might be accomplished in five to ten minutes. It may last longer if the conversation leads toward a particular goal.
  - You might consider using the texts found in the sacred partnership resource.

• **Review of the first goal:**
  - Read the first goal so that everyone is clear as to which goal you are discussing.
  - The rabbi should share successes toward this goal and how they were achieved.
  - The rabbi should share challenges toward achieving this goal and why.
  - The review committee members should share successes of the lay leadership toward this goal and how they were achieved.
  - The review committee members should share challenges for the lay leaders toward achieving this goal and why.
  - Jointly discuss support that could assist in the achievement of the goal.

• **Repeat the review for each of the established goals.**

• **Next steps:**
  - Set the next meeting date.
  - Establish reasonable benchmarks for success for both the rabbi and lay leaders for the next meeting.
Blended Review

The blended review asks the partners to reflect not only on progress toward pre-established, agree-upon goals, but also on the meaning of that progress for the relationship between the rabbi and professional staff and the lay leaders. Clarity on the definition of success in the achievement of the goal and in the enhancement of the relationship is essential in a blended review.

Below is one model of a blended review, and by no means does it exhaust the ways in which a blended review might be constructed. It does, however, suggest a way in which a summative review and a formative review might be conceived so that much is learned about the pursuit of a goal and even more is learned about the sacred partnership in which the rabbi and the lay leaders are covenanted.

<table>
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<tr>
<th>I. WHAT WE ACCOMPLISHED</th>
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<tbody>
<tr>
<td>CONGREGATIONAL GOAL #1</td>
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<tr>
<td>LAY LEADERS</td>
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<tr>
<td>a) Subgoals for the lay leaders (board, committee, task force):</td>
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<td>1.</td>
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<td>2.</td>
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<tr>
<td>3.</td>
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<tr>
<td>b) Progress made toward achievement of subgoals:</td>
</tr>
<tr>
<td>1.</td>
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<tr>
<td>2.</td>
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<tr>
<td>3.</td>
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</table>
CLERGY AND SENIOR STAFF

a) Subgoals for the rabbi and senior staff:
   1. 
   2. 
   3. 

b) Progress made toward achievement of subgoals:
   1. 
   2. 
   3. 

CONGREGATIONAL GOAL #2

LAY LEADERS

a) Subgoals for the lay leaders (board, committee, task force):
   1. 
   2. 
   3. 

b) Progress made toward achievement of subgoals:
   1. 
   2. 
   3.
CLERGY AND SENIOR STAFF

a) Subgoals for the rabbi and senior staff:
   1. 
   2. 
   3. 

b) Progress made toward achievement of subgoals:
   1. 
   2. 
   3. 

INTENTIONAL CONVERSATION ON GOALS

1. How has our sacred partnership been realized in working toward these goals? How have we helped each other? What skills have we demonstrated in collaborating on these goals?

2. What areas of strength have been revealed in our working together toward these goals? What areas of challenge?

3. How can we capitalize on our areas of strength? What resources can we bring to bear in order to deal with the challenges that we encountered?

4. How has our experience with these goals impacted our sacred partnership? What have we learned about each other that we did not know before?
II. HOW ARE WE GETTING ALONG?

1. In pursuing our goals, what did we enjoy the most in working together? What did we enjoy the least?

2. Do we share our vision of the synagogue with one another, and do we articulate it well to our congregants? How do we empower one another to live out the vision and mission of our community?

3. How do our rabbi and other senior staff people honor the sacred relationship with the lay leaders, and how do our lay leaders demonstrate kavod (respect, honor) for the rabbi and other k’lei kodesh (sacred vessels; i.e., Jewish clergy) of our congregation?

4. How willing are we to take risks beyond our goals? How tolerant are we of failure? Of feedback? How willing are we to adjust our goals in light of changing circumstances and needs?

5. What three things surprised us most in our community this year? What have we learned from these surprises?
Sharing the Review with the Board

One difference between corporate and congregational life is that the purpose of a synagogue is to create holiness within the community. The review process should be oriented around that proposition. How can our review lead to deeper and richer relationships between our professionals and our lay leaders? How can our review bring us into covenant on our journey? How can our review help us to bring the wisdom, beauty, and value of Judaism into the lives of our congregational family?

It is our recommendation that a short summary be created by the chair of the review committee that describes the process, general content of the ongoing conversations, and an enumeration of next steps following the review that can be used as a catalyst for the next review process. While there should be transparency regarding the process, the details must remain confidential. If the rabbi would like a written report, we recommend that the review committee chair speak with the rabbi to ascertain what, in particular, is being sought. While the documentation is important, it is different than in a corporate setting. This review is not meant to determine salary or promotion, but rather be a way to build sacred partnerships and provide for continuing growth and ongoing reflection on shared mission, vision, and values.
Conclusion

Whichever review process you choose to use and adapt will assist in creating the healthy and vibrant congregation we all want for our communities. It is not always easy to begin creating and achieving a strong mutual review process, based within a sacred partnership. The details of choosing the process and determining the appropriate members for the review committee may seem daunting. However, the benefits and rewards for both the rabbi and the congregation, if done well, will have far-reaching positive feelings and results. B’hatzlachah, much success, as you begin or strengthen this important journey.
APPENDIX A
Best Principles for Mutual Review

Best principles are fundamental elements that one must consider when creating a new initiative or adapting one that exists. They are concepts forged from experience, which must be the framework around which any initiative is designed. This is not to be confused with best practices, which assumes that if you replicate practices directly from another congregation, you too will garner success. We advise that you view these best principles in mutual review and treat them as the tenets that undergird your review process.

Sacred Partnership
A review process must be built upon mutual respect, integrity, and trust. The culture and the work of the synagogue depend on the effective functioning of sacred partnerships between synagogue professionals and lay leaders.

- A review is an opportunity for strengthening and deepening these critical relationships and for reaching shared understandings regarding the future of the congregation.
- We recommend reviewing the sacred partnership definition found on page 32 in this document before you begin envisioning your review process. To help create a stronger foundation, we recommend URJ’s Sacred Partnership: A Resource and Discussion Guide.

Open Communication
A review process requires the ability to hear what the other is saying, actively seeking to explore and understand the other person’s perspective.

- A mutual review process encourages open, honest, and reflective dialogue, encouraging valuable feedback, coaching, and cooperative problem-solving.
- Open communication is developed through ongoing and consistent conversation.

Transparency
Transparency is the opposite of secretive and is a hallmark of unambiguous and clear motives and communication.

- There should be no surprises in a review process, as they indicate failure of ongoing communication and lack of transparency.

Accountability
In a mutual review we hold everyone accountable to the goals established and to the process of self-reflection.

- As sacred partners, everyone involved in the process must see themselves accountable to each other and to the congregation.
- Meetings are scheduled in advance and, other than the case of true emergencies, are kept as important and valued time.
**Mission-Driven**
Mutual review aligns with and serves the congregational mission, vision, and values.

- A lack of alignment may indicate a need to formally reexamine the congregation’s mission, vision, and values statements for the appropriate fit for either the professional or the congregation.

**Honest Self-Examination**
A strong review process identifies and builds upon strengths. It requires an examination of what is going well and the efforts toward improvement in areas of necessary growth.

- Self-appraisal is an important aspect and should be part of the evaluation process, reflecting self-awareness of one’s own strengths and challenges. This self-reflective process should align with both personal improvement goals as well as the needs of the congregation.

**Encouraging Change to Enable Growth**
There is no growth without change, and there is no change without effort. Review helps manage change and growth in such a way that it is healthy and positive for everyone.

- To allow for continued development of professionals and lay leaders, each must be willing to take a step back and allow others to take responsibility. *Tzimtzum* (self-contraction, making the space for others) is never simple. It requires creating space for the other’s exploration of ideas and approaches.
- Growth requires support from our sacred partners, encouraging rebounding from missteps and celebrating successes.
## APPENDIX B

**Best Practices and Their Stumbling Blocks for Mutual Review**

<table>
<thead>
<tr>
<th>It is a best practice:</th>
<th>It is a stumbling block:</th>
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</thead>
<tbody>
<tr>
<td>To establish as your primary goals:</td>
<td>When the lay leadership creates a one-way review without the agreement of the rabbi on the purpose of the review.</td>
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<tr>
<td>• Enhancement of rabbinic-lay leadership relationships.</td>
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<tr>
<td>• Development of increased understanding and appreciation of each other.</td>
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<td>• Meeting or improving the established goals set by the rabbi and lay leadership.</td>
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<td>• Facilitation of both professional growth and lay leadership growth.</td>
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<tr>
<td>To consider past, current, and future lay leaders when selecting the reviewers:</td>
<td>When the members of the review committee have little day-to-day contact with the rabbi or the congregation.</td>
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<tr>
<td>• Long-term, year after year, continuity helps in the review process by providing perspective, fairness, and stability.</td>
<td>When the committee members have axes to grind or agendas to pursue.</td>
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<tr>
<td>• Reviewers should separate their role as a congregant from their role as a lay leader.</td>
<td>When the committee members feel beholden to a particular faction within the congregation.</td>
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<tr>
<td>• The reviewers should work closely with the rabbi, be involved in the life of the congregation, and be respected by both leadership and the membership.</td>
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<td>• Both the rabbi and the president should agree on the members of the review team.</td>
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<td>• Lay teams may look different in different congregations.</td>
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<td>It is a best practice:</td>
<td>It is a stumbling block:</td>
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<tr>
<td>To initiate the process with positive feelings among all the parties and with the intention to make the review useful and constructive.</td>
<td>When the rabbi has no advance notice of the review or the review is conducted in secret without the rabbi’s input or knowledge.</td>
</tr>
<tr>
<td>When the review is conducted in secret without the rabbi’s input or knowledge.</td>
<td>When the review is conducted publicly by soliciting input from the congregation by way of a survey or private conversations with staff and members.</td>
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<tr>
<td>To establish through the process an atmosphere of mutual understanding and mutual growth, creating a sacred partnership between the rabbi and the leaders.</td>
<td>When lay leaders resort to online surveys that reduce complex matters such as worship, teaching, and preaching to yes-no, binary responses and provide incomplete, simplistic, and skewed information.</td>
</tr>
<tr>
<td>To engage in give and take, support, honesty, and listening to and hearing each other.</td>
<td>When there is no protocol for maintaining the review process confidentiality, and the review is shared broadly within the congregation.</td>
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<td>To orient the review toward the future so the review process focuses on what lay and rabbinic leadership can do, in contrast to what wasn’t done. This lays the groundwork for jointly developing action plans in alignment with the vision and mission of the congregation.</td>
<td>When the review process is focused on the past and on fixing blame and finding fault rather than planning for the future.</td>
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<td>To separate the review from contract renewal and compensation discussions. This keeps the focus on the future and provides the opportunity to enhance relationships and goals.</td>
<td>When the review is conducted explicitly for the purpose of deciding whether to renew the rabbi’s contract. This intensifies the anxiety around the review and yields less-than-honest responses.</td>
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<td>It is a best practice:</td>
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<tr>
<td>To carry out the review on a regular basis throughout the year.</td>
<td>When the review conversation happens only once a year or even less regularly.</td>
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<tr>
<td>• We recommend that the reviewers and rabbi meet a minimum of two times a year in</td>
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<td>order to maintain ongoing conversations.</td>
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<td>• We recommend the keeping of regular shared notes so that we do not rely on</td>
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<td>memory.</td>
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<td>• These shared notes and conversations should conform to the agreed-upon rules of</td>
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<td>confidentiality.</td>
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<td>• We recommend that the rabbi and president meet weekly or bi-weekly on day-to-day</td>
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<td>matters, reviewing the state of the synagogue.</td>
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<td>• These frequent meetings are a part of the overall ongoing mutual review process.</td>
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<td>To establish at the first meeting the purpose of the review and</td>
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<td>• To outline both the rabbi’s and the reviewers’ goals for the review.</td>
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<td>• To schedule review dates.</td>
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<td>• To share notes and results of the last review of the rabbi and the board.</td>
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<td>• To evaluate the progress of the process.</td>
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<td>To be aware of and understand inherent</td>
<td>The reviewers and the rabbi are oblivious to their inherent</td>
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<td>biases. The rabbi’s and the reviewers’</td>
<td>biases, and thus their biases distort their perception of</td>
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<td>personal life experiences provide the</td>
<td>the successes and failures of the other.</td>
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<td>foundation for how they see the world, as</td>
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<td>well as their attitudes and stereotypes.</td>
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<td>Bias is natural, and identifying it allows</td>
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<td>the reviewer to be open to others’ perceptions, approaches, and decisions.</td>
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<td>To review objective actions and tangible</td>
<td>When the review process results in vague and unactionable</td>
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<td>results, on the one hand, as well as</td>
<td>feedback or numerical or letter grades. These approaches open</td>
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<td>subjective traits such as leadership,</td>
<td>the door for disagreement and mistrust and are de-motivating.</td>
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<td>attitude, assumptions, and motivation.</td>
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<td>Every person draws from his or her own</td>
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<td>personal life experiences. Understanding</td>
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<td>this helps the lay leaders and the rabbi</td>
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<td>step back from their personal biases and</td>
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<td>enables them to understand the other person.</td>
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<td>Summative and formative reviews are both</td>
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<td>important, and together they provide a holistic perspective.</td>
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<td>To regard the review conversations as</td>
<td>When lay leadership or the rabbi presumes to know the reason</td>
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<td>opportunities for both lay leadership and</td>
<td>behind a challenge and the solution without exploring them</td>
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<td>the rabbi to explore both challenges and</td>
<td>with one another and without testing possible responses.</td>
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<td>successes:</td>
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<td>• To identify current challenges and solutions that will lead to growth and new successes.</td>
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<td>• To recognize and discuss new challenges and brainstorm ways to overcome these together.</td>
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<tr>
<td>It is a best practice:</td>
<td>It is a stumbling block:</td>
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| To allocate both monetary and time commitments to finance the review itself and its recommendations:  
  • To ensure that the financial resources budgeted by the board will be sufficient to enable both the rabbi and lay leaders to fulfill their goals and mutual expectations.  
  • If funds are limited, adjustments in expectations are necessary. | When the review itself is not adequately funded.  
When the recommendations of the review are not adequately funded. |
| To establish a positive follow-up plan at the end of the yearly review:  
  • To outline the next three or four steps along with the person responsible for implementation.  
  • To commit the financial resources required for professional development and other activities necessary for success. | When no follow-up plan is created or when no implementation responsibilities are agreed upon. |
| To conclude each review session with a written summary that might include insights, actions to be taken, and suggestions for future conversations. | When the review concludes with no direction whatsoever and leaves everyone feeling it was a waste of time. This lack of direction can also lead to conflict and misunderstandings. |
| To seek the assistance of Reform Movement professionals when conflict exists between the lay leaders and the rabbi.  
Both lay leaders and the rabbi should familiarize themselves with the resources available from the URJ and the CCAR and seek them out when indicated. | When conflict exists between the rabbi and lay leaders and they choose to ignore it. Conflict avoidance leads to deeper and more destructive conflict. Conducting a review in the presence of unaddressed conflict is counterproductive. |
APPENDIX C
Guiding Definitions

Assessment
Assessment is formative—an ongoing continuous system, quality improvement. It is long-term, process oriented, and interactive. Assessment provides information that identifies what is going well, what needs improvement, and areas of challenge. It allows for improvement and growth by identifying areas that will benefit from feedback, coaching, and learning. Assessment is a guide for goal setting and decision-making. It helps determine a person’s fit with and capacity for their role.

Evaluation
Evaluation is summative and product oriented. It occurs at one moment in time and determines whether established goals have been achieved. Evaluation is based on externally imposed standards and how well those standards have been met. It is judgmental, focusing on what’s been learned and achieved, and arrives at an overall analysis. Evaluation measures strengths, weaknesses, effectiveness, and value.

Review
Review is a yearly system to look broadly over the ongoing assessments and internal evaluations. A review is part of a comprehensive governance process that should be conducted with no surprises. An annual review provides an opportunity to develop or refine a professional development plan as part of a performance assessment process.

Mutual
What is meant by the term “mutual” in the context of a review process?

The term “mutual” means:

- Reciprocal: feeling or action experienced or done by each of two or more parties toward the other or others
- A partnership based on reciprocal respect and understanding
- Held in common by two or more parties

To use this term in the context of a review implies that the process is not unidirectional; rather both parties bring their ideas, thoughts, and philosophies to the table. The lay leadership does not just review or evaluate the rabbi, nor does anyone unidirectionally provide feedback to another person. For the review to be mutual requires reciprocity. Such
reciprocity is grounded in respect and a common, agreed-upon understanding—a sacred partnership. Both parties come to the process with a clear understanding that this is a healthy exchange meant to develop both the organization as a whole and each individual within it.

**Performance versus Impact**

We often speak of reviewing a rabbi’s or any synagogue’s professional’s “performance.” We try to assess whether the rabbi, cantor, or educator is carrying out his or her job well. “Performance” is usually understood as action, as something that the professional *does*. In this sense performance is related to but different from outcomes. Outcomes or results can be a method for determining performance, with the caveat that outcomes are influenced by situational factors outside of the professional’s control. Nonetheless, a performance review tries to measure how well the professional’s actions were executed, with the focus on conduct, activities, and behaviors. For example, a synagogue professional's performance review might try to evaluate the following: How many new members has the rabbi brought in? Has the cantor spent a sufficient amount of time in the religious school? Has the educator held five in-services for the teachers?

On the other hand, the work of synagogue professionals often centers more on advancing the quality of a community’s Jewish life than on meeting specific goals. This requires the nurturing of deep relationships, the fostering of powerful Jewish experiences, and the cultivating of a supportive and warm community. For this to happen, the synagogue professional needs a strong sense of self acquired through learning, self-reflection, and spiritual growth. A review that seeks to ascertain the impact that the professional has on the quality of a Jewish community’s life focuses on providing feedback and challenging the professional’s own Jewish formation, assisting the professional in enhancing his or her self-knowledge, Jewish learning, and creativity. This kind of review ultimately aims at assessing the professional’s impact on the community rather than the professional’s behaviors, activities, and conduct.

**Partnership**

As with any work that is done within the congregation, achieving goals rests on many shoulders. To support these efforts, we advise that you find one or several other leaders to assist you in the achievement of these goals—these other leaders are your partners. Our use of the word “partnership” is based on the ideal that all leaders in the congregation share responsibility for established goals, and these leaders work in partnership to attain success. We advise that these goals be created based upon the mission, vision, and values of your community. At the foundation for achieving these goals is the relationship between and among leaders of a congregation—that of lay leaders and congregational professionals, among lay leaders and among the congregational professionals.

Congregations are not and should not be described in business terms; rather our relationships are built on the understanding of the sacred and holy nature of our work. Having open and clear lines of communication is essential to creating a deep and lasting partnership. This requires that the partnership values openness and respecting all opinions, even those different from our own. To allow healthy and necessary dialogue we must value the diversity of opinion and talents, understanding that this multiplicity of aptitudes, skills, expertise, and opinions is
necessary to create a strong and thriving congregational community. Each of us is created
*b’tzelem Elohim*, in the image of God, making each person unique, thereby reminding us of
the importance of seeking others with whom to be in partnership who have different talents
and skills, those that complement our own, to support the varied needs of the community.
While each partner has shared responsibility for the achievement, at times one person
may have need to take the lead and at other times allow others to spearhead the work.
Partnerships require give and take, thus the need for open lines of communication and
respect for one another.

**Principles**

Principles are rules, values, and norms that are both accepted and understood as being
fundamental to the healthy functioning of the congregation. Principles are basic ethical
beliefs and provide the framework that guides the review process. They provide the
motivational force that helps to determine the actions involved in mutual review.
Principles remain intact regardless of changes in goals, objectives, or strategies and are
seen as essential.
APPENDIX D
Mutual Review Team Selection Criteria

The president, in partnership with the rabbi, selects the members of the mutual review team. The quality of the review depends on the team that is chosen. It is necessary that each team member understands and trusts the selected review process. Good chemistry among the members makes for an effective team. Best practice is to consider the following when selecting review team members.

Experience

- Is involved in the life of the congregation
- Has worked with lay leadership
- Has worked with the rabbi
- When a team member has a background in corporate management, it is natural to apply these “business skills” to the synagogue. As Amy Asin explains in her article “Why Leaders Shouldn’t Aspire to Run Congregations Like Businesses,” these business skills are not always helpful in synagogue life. Similarly, having a background in corporate human resources is not necessary. In fact, such a background may create a biased understanding of the review process and might interfere with the sacred approach to this mutual review process.

Characteristics

- Is willing to learn about self and others
- Is fair, honest, and trustworthy and is perceived as fair, honest, and trustworthy
- Is open to change
- Has a big-picture frame of reference
- Envisions a positive future for the synagogue
- Is Jewishly knowledgeable
- Is diplomatic
- Is respectful
- Has a calm demeanor
- Is nonthreatening
- Has a positive regard for the rabbi and the rabbi’s family

Skills

- Is able to be present, giving full attention
- Is open-minded to the process
• Is able to actively listen, hear, and comprehend others
• Can clarify and reflect to confirm comprehension
• Is able to observe others
• Is mindful that we all possess implicit bias: We have attitudes and reactions toward people without our conscious knowledge. It is natural to perceive life through our individual lens that develops from our past experiences.
• Is able to separate one’s own biases from another’s viewpoint
• Is an effective communicator
• Understands that communication is a two-way process
• Is able to understand others
• Is able to ask good questions
• Is able to explain and relay one’s thoughts and opinions
• Is able to encourage others
• Is aware of one’s body language and maintains eye contact
• Observes and understands nonverbal communications
• Is aware of one’s own emotions and able to observe another’s emotions
• Understands the difference between secrecy, confidentiality, and transparency
• Demonstrates sacred partnership
APPENDIX E
Additional Formative Review Questions

The following are some additional questions that fit into a formative review:

- How would we describe the spiritual orientation of our congregation’s Jewish life?
- Are there indigenous practices that have shaped our congregation’s Jewish life?
- How might those practices be supported and nurtured?
- What parts of our synagogue’s previous journey might need to be grieved or let go?
- How do the Jewish historical and textual traditions shape our Jewish decision-making?
- How does our synagogue’s history inform who we are today, and how does that affect our leadership?
- How does the practice of appropriate confidentiality and vulnerability get nurtured in our congregation?
- How does the practice of developing healthy relationships with boundaries get discussed and explored in our synagogue?
- Can we restate the synagogue’s mission and apply it to the current state of the synagogue?
- What has been learned this week that we need to remember for the future?
- Have we made mistakes that we need to learn from and take responsibility for?
- Have we been open to all people—all ages, all races, all ethnicities, all disabilities, all gender orientations and identifications?
- What steps will we take to deepen our knowledge and practice of Judaism?
APPENDIX F
Giving and Receiving Feedback

A healthy and durable review process serves as an opportunity for continued growth and development of the sacred relationship between rabbi and congregation. What is communicated and how it is communicated, and received, are integral to a good process.

Sacred Partnership
“When two people sit together and there are words of Torah between them, the Shechinah [Divine Presence] dwells among them” (Pirkei Avot 3:2).

A sacred partnership is a commitment to building and nurturing relationships that elevate the work of leadership to a level of holiness. Sacred partnerships recognize each of us as individuals and our desire to inspire sacred action in our communities.

Sacred partnerships are built and nurtured through the Jewish values of mutual respect, trust, honesty, listening and communication, transparency, confidentiality, flexibility, reflection, empathy, and vulnerability.3

Giving and Receiving Feedback
Meaningful reviews require that the information be shared (both offered and received) in a nonthreatening and nonjudgmental way. Consider the information that is shared as an invitation to further discussion and dialogue, creating a two-way communication that is imperative to growth, development, and renewal.

This resource, “Giving and Receiving Feedback,” from the Lewis Center for Church Leadership at Wesley Theological Seminar, is an excellent reference for understanding what is and is not feedback. It also provides tips on asking for, giving, and receiving feedback. Remember that it is not helpful when providing feedback to bring unevaluated or anonymous complaints or to give all sources equal credibility. It is important to put all issues in perspective.

Giving Feedback: Wisdom Culled from Our Tradition
Our Jewish tradition and values have much to offer in preparation for a healthy discussion. Resources from the Pardes Center for Judaism and Conflict Resolution can be helpful to both the reviewer and reviewee in preparing to engage in a constructive conversation. Both parties must bring self-awareness, humility, respect, curiosity, and a willingness to engage openly and honestly. For the reviewer, the Pardes Center’s “10 Tips for Constructive Feedback from the Rambam” provides tips for giving feedback constructively.

The Importance of Knowing How to Receive Feedback
Perhaps more important than giving feedback is knowing how to receive it. The receiver is in charge of what they are going to let in. In this twenty-minute TEDx talk, entitled “How to Use Others’ Feedback to Learn and Grow,” Sheila Heen, coauthor of the best-selling book

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Difficult Conversations: How to Discuss What Matters Most, reminds us that “the key is learning how to take in the blizzard of feedback that we come in contact with every day.” As Heen notes, the idea of taking feedback well is much less understood. Handling feedback well changes how others see you and experience you.

A Word about Tochachah (Respectful Rebuke)
There may be times when tochachah (a Jewish concept for respectful rebuke or reproach) is required. This, too, is a form of feedback, but it can often feel uncomfortable for each party. If strong, positive sacred partnerships have been established, offering challenging feedback can be more easily given and received. Remember that your sacred partner is created b’zlelem Elohim (in the image of God) and should be treated as such. For more learning and reflection on tochachah we again recommend looking at the important work done by the Pardes Center for Judaism and Conflict Resolution at the Pardes Institute of Jewish Studies. A study guide developed by Pardes entitled Can We Talk about This? Tochachah: A Study Guide for Constructive Communication introduces the concept of tochachah more broadly as “constructive communication.” The resource is a wonderful guide into understanding tochachah as a mitzvah (instructed action), the practice of tochachah, and importantly, when to refrain from tochachah. The study guide reminds us of the importance of doing the inner work necessary, before we rebuke or reproach someone else, to understand where we are coming from in offering the challenging feedback. When offering difficult feedback, it is always imperative to consciously know that the words will not do more harm than good.
APPENDIX G
The Relationship between Review and Renewal

The purpose of a rabbinic review is to determine how we are doing together and how we can make things better. Though conventional wisdom has it that you should do a performance review to determine whether to renew a rabbi’s contract, a congregation should never do a one-time review for the sole purpose of deciding whether to retain a rabbi. Such a one-time review will increase the anxiety of both the rabbi and the lay leaders, leading to heightened tensions and subverting the value of the review.

Still, there is a relationship between the reviews (notice the plural) and the eventual decision to continue a rabbinic-congregational relationship.

When a rabbi and a congregation engage in several reviews over the course of several years—whether those reviews are summative, formative, or blended—certain patterns emerge. Ideally, any shortcomings or misalignments have been identified and explored. Moreover, resources to aid rabbis and lay leaders in addressing these issues are available through the Reform Movement partners.4

Over time and through several reviews, a picture of the rabbi-congregation relationship takes shape around questions such as these:

- Have we accomplished our goals together?
- Are our beliefs and assumptions aligned?
- Has our mutual feedback enhanced our relationship?

Through many reviews, the aggregated information will make clear whether we should continue our relationship.

When the time comes for the renewal conversation, the rabbi and the lay leaders will have assembled a history of their relationship through multiple reviews. No single review should be determinative; many reviews, taken together, will reveal whether mission, vision, and goals are shared. When these fundamentals are held in common along with other assumptions and beliefs about the synagogue, the decision to renew the rabbi should be yes.

Sometimes, though, there is persistent negative feedback through the reviews over time, and this persistence may be indicative of a divergence between the rabbi’s sense of his or her rabbinate and the congregation’s wants and needs in its rabbi. At this point, the mismatch may suggest a parting of the ways.

In sum, synagogues should not engage in a one-off review only for the purpose of evaluating whether a rabbi’s contract should be renewed. Many reviews done over several years, mapping the trajectory of the rabbi-congregation relationship, will make plain for the rabbi and the lay leaders whether the relationship is in sync or has run its course.

4 You might contact the CCAR’s Placement Office, the URJ’s Department of Consulting and Transition Management, and the National Commission on Rabbinic-Congregational Relations (NCRCR).
APPENDIX H
Bibliography and Other Resources on Clergy Review

Books

*Evaluation Essentials for Congregational Leaders: Setting the Table for Healthy Conversations.* Grand Rapids, MI: Sustaining Pastoral Excellence Initiative of the Christian Reformed Church in North America, 2010,


Online Resources


