

Guide to Values-Based Review



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Contributors

Lisa Lieberman Barzilai, RJE, Union for Reform Judaism
Helayne Friedland, Union for Reform Judaism
Tricia Ginis, Early Childhood Educators of Reform Judaism
Shelley Gordon, Program and Engagement Professionals of Reform Judaism
Rhonda Jellenik, Temple Chayai Shalom, Easton, MA
Michael Liepman, National Association for Temple Administration
Rabbi Janet Offel, Union for Reform Judaism
Robin Riegelhaupt, Union for Reform Judaism
Rachel Roth, American Conference of Cantors
David Rudnick, Congregation Rodef Sholom, San Rafael, CA
Rachel Schachter, Advancing Temple Institutional Development
Rabbi Stan Schickler, Association of Reform Jewish Educators
Lauren Schlezinger, Peninsula Temple Sholom, Burlingame, CA

About this Guide

The URJ is committed to supporting synagogue leaders in their sacred work. In partnership with our contributors, we offer this pilot *Guide to Values-Based Review* as a resource to congregational leaders—clergy, professional staff, and lay—who are navigating the often-challenging review process.

We developed the guide to be useful to leaders in congregations of all sizes. It provides both foundational theory and concrete examples of how to perform values-based review.



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Introduction to Values-Based Review

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

A review is an opportunity to help the entire congregation, including the professionals and the board, achieve the synagogue's mission, vision, values, and goals, and we believe a values-based review places the core values of sacred partnership as the foundation for success. Values-based review includes thoughtful and intentional discussion of balancing the immediate needs of the congregation while discerning plans for the future. It sets the direction for leadership development, identifying strengths, challenges, and areas for essential growth. Values-based review encourages exploration, discovery, and experimentation. This requires the commitment of everyone in the process.

We regard values-based review of cantors and professional staff, and the role of lay leaders, as essential for the congregational community. After all, if synagogues are, among other things, learning communities, what better place to start than to learn about the synagogue? We believe that, done well, reviews have the potential to reveal new insights, goals, and directions and foster a deeper awareness of the relationship between the synagogue, professional staff, and lay leaders. (For best principles in values-based review see Appendix A. For tips for success and stumbling blocks to avoid see Appendix B.)

In the following pages, we share with you our operating principles and definitions and explicate our belief that reviews are at the heart of everything a synagogue community does.

May God bless all the deeds of our hands.

¹ Review the full *Sacred Partnership Resource and Discussion Guide* for more.

The Values-Based Review Process

Setting Up the Review Process

It's a common misperception that an annual written reflection or appraisal comprises the entirety of the review process. Rather, this important milestone for reflection and planning is but part of a deeper, intentional, robust review process, which we recommend beginning in the follow manner:

- In consultation with the cantor or congregational professional, invite members to be part of the values-based review committee.
- Set meeting dates for the year that everyone agrees to keep; make changes only if a significant conflict arises (we recommend 3–4 meetings over the course of the year).
- 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 cantor or congregational professional write a review of the previous year's goals, noting accomplishments and challenges with achieving these goals.
- Go over the cantor's or congregational professional's review of the previous year (if applicable) during the first meeting. At the same meeting, begin to develop the goals for the upcoming year.
- Each subsequent meeting should have a set agenda based on the established review process.

Roles

The size and structure of your synagogue will influence who is involved in the values-based review process. Lay leaders always play an important role in the review of senior-level clergy and professionals; they will likely participate in reviews of other staff in smaller congregations. In larger congregations, there may be professional staff members who are responsible for assessing the performance of those they supervise.

In this guide, we refer to:

- Reviewee: The professional whose performance is being reviewed
- Reviewers: The person or people responsible for the review process; this might include clergy, professional staff, and/or lay leaders depending on the size and reporting structure of the congregation

(For tips for a successful values-based review process see Appendix B.)

A Note about Lay Leader Involvement

It is best to consider past, current, and future lay leaders when selecting the reviewers. Long-term, year-after-year continuity helps in the review process by providing perspective, fairness, and stability. Lay reviewers must be able to separate their personal role as a congregant from their role as a lay leader. The reviewers must work closely with the reviewee, be involved in the life of the congregation, and respected by both the leadership team and members for this sacred and sensitive work.

For review of professionals, both the professional and president should agree on the review team members. Lay teams may look different in different congregations. We recommend that the review team be small, approximately three members, to allow for diverse representation but not too large as to be cumbersome. One example may include the immediate past president, the current president, and the president-elect or first vice president. Another example may include a committee chair with whom the professional works on significant projects or programs, an executive

committee member (possibly the president), and a lay volunteer who *does not* sit on the board of trustees. One other model to consider is the congregational president/chair of the personnel committee/or other designate, one congregational leader designated by the professional being reviewed, and one congregational leader mutually agreeable to the professional and the president. Depending on the supervisory structure within the congregation it is possible, and even likely, that a professional may also serve on the review committee. It is imperative that a supervisor—as the one who actively works with the direct report being reviewed—has a role in the review process.

Timeline and Process

We believe that values-based review should be done on an annual cycle. We recommend establishing a common time period for all roles in the synagogue that are being reviewed. You might choose for the time period to coincide with the fiscal year, the programmatic year, or the calendar year.

- One to two months prior to the start or renewal of the review period, the person leading the review process should set a meeting for the reviewers and the reviewee. This meeting will set the framework, so all parties are prepared for upcoming review; the meeting will include confirming the purpose of the review; outlining agendas for the yearly review; scheduling meeting dates; sharing a copy of the review documents; and agreeing on the details of the review process.
 - The reviewee should complete a self-reflection (also known as self-appraisal; see Appendix C).
 - At this time, the reviewer(s) should complete a written reflection.
- Once these pieces are complete, the reviewee and reviewer(s) convene to discuss the reflection.
- The group collaborates on goals (see Collaborative Goal Setting on page 9), discussing strategies for successful achievement of these goals based upon the congregation's goals or strategic priorities. This can take place in the initial annual review meeting if time allows, or you can schedule a follow-up conversation. (See Appendix D for an example of how one congregation collaborates on developing goals.)
- The reviewee and reviewer(s) should meet regularly to assess how things are going and to adjust as necessary. Depending on your congregation's size and structure, these meetings might happen quarterly or twice a year, but are always outside of regularly scheduled weekly or monthly meetings between sacred partners. However, to ensure that there is both trust and transparency in the review process, we do recommend meeting no less than twice a year.

The Annual Reflection Exercise— Narrative and Rubric Reflections

The annual reflection exercise is a milestone in the values-based review process, marking the point at which formal feedback is exchanged between the reviewee and reviewer(s). We recommend an approach that leads to an annual summation, including written self-reflection, the reviewer(s)' appraisal, and a statement of goals for the coming year. This reflection can take different forms, including narrative and rubric.

With a **narrative review**, reviewees and reviewers simply answer questions about performance and cite specific examples to support their responses.

Consider these examples of narrative questions for self-reflection (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 manifested?
- 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 congregation's leaders?
- 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?

A **rubric review** evaluates competencies, skills, and knowledge according to a descriptive scale. Each scale rating should be clearly defined, and each rated area should leave room for a brief explanation.

For example:

- 1. Demonstrates expertise, knowledge, and skill in carrying out their role. (Interacts with lay leaders, congregants, and other professionals with an appropriate level of professionalism and competency.)

Seldom Sometimes Usually Almost Always Not applicable

Comment: _____

- 2. Strives for and delivers high quality results. (Maintains high standards. Work is accurate.)

Seldom Sometimes Usually Almost Always Not applicable

Comment: _____

- 3. Communicates effectively. (Expresses ideas clearly, thoroughly, and concisely when speaking and writing. Readily shares appropriate information with others.)

Seldom Sometimes Usually Almost Always Not applicable

Comment: _____

(For information on improving both giving and receiving feedback see Appendix F.)

Collaborative Goal Setting

Introduction

Setting goals for both the organization and individuals is an important task that should be a collaborative effort between the professional staff and the board of trustees. Boards and senior professional staff who focus together on what matters most and who move together toward addressing the mission and issues of the congregation will find more satisfaction in their work together and will be better equipped to reach—or re-evaluate—the goals they set.² This work also builds, sustains, and deepens sacred partnerships.

Shared Goals and Accountability

To collaborate effectively, professional staff and their supervisor or board members should discuss what they see as important over the short term and long term. (This process is often part of the annual review discussion.) What is discussed in these meetings will be the basis of shared goals. Some goals may be congregational in nature, such as increasing Shabbat service attendance, and some may be personal, such as a professional staff member completing a master's degree or certificate program in a specific area; both types of goals are important to the future and the health of the congregation, and all goals should be driven by the congregation's mission, vision, and values statements. (For information on how one congregation approaches this see Appendix D.)

The professionals must be accountable for defining their individual goals, which means writing and monitoring them (see Appendix E—Template for Documenting and Monitoring Goals). It's the role of leaders/reviewers to review and approve the goals annually, and to discuss progress at least twice throughout the year in addition to the annual review meeting.

Proven Strategies

Setting and evaluating goals can be a simple process for congregations of all sizes. Here are guidelines for crafting annual goals in partnership with congregational professionals:

- Focus on growth and change
- Write SMART goals
- Align individual and congregational goals
- Quantify the subjective

Focus on Growth and Change

Meaningful goals focus on an individual's professional growth and/or changing circumstances in the synagogue. For example, an educator would not set a goal to be in attendance while school is running. An executive director would not set a goal to supervise the bookkeeper. A president would not set a goal to chair board meetings. These responsibilities are assumed to be a fundamental part of their respective roles and, therefore, left out of these goals.

² Chait, Richard P., William P. Ryan, Barbara E. Taylor, "Governance as Leadership: Reframing the Work of Nonprofit Board," Boardsource. John Wiley & Sons, Inc. 2005. Page 89.

Now consider a congregation that is focused for the next year on building stronger, more meaningful connections. Individuals need to grow and change in their roles in order for the congregation to be successful. The following examples are offered for illustrative purposes.

- Clergy: Develop opportunities for our congregants to interact at every worship service and Torah study.
- Executive director: Organize 25 Shabbat dinners over the course of the year, connecting new members with veteran members.
- President: Create opportunity in every board meeting for trustees to learn about one another and/or share stories about their connection to the congregational community.
- Membership committee: Evaluate our new member welcome process and identify improvements that will result in 60% retention after three years.

We recommend drafting 3-5 goals that articulate growth and change. Other members of the professional staff and lay leaders may also have a role in achieving a congregational goal, so be sure to account for this in the goal-setting template.

Write SMART Goals

The SMART model is commonly used as a guide for goal setting. SMART stands for Specific, Measurable, Attainable, Relevant, and Time-bound. Here are some examples of common pitfalls and how to transform statements into a SMART Goal.

<p>Goal isn't specific: Executive director: Be warmer and more welcoming.</p>	<p>SMART: Be a role model for the community in creating a warm environment. For example, I will welcome congregants at the sanctuary doors before services start. As a next step, I will research Audacious Hospitality.</p>
<p>Goal isn't measurable: Education director: Improve parent engagement.</p>	<p>SMART: 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/school.</p>
<p>Goal isn't attainable: Early education director: Triple the number of families enrolled in our school from 50 to 150 within two years.</p>	<p>SMART: Grow early childhood program enrollment by at least 10% in each of the next three years.</p>
<p>Goal isn't relevant: Program director: Find opportunities to grow in the position.</p>	<p>SMART: Join national organization for program directors (PEP-RJ) and participate in at least two professional development opportunities directly related to my work.</p>
<p>Goal isn't time-bound: Cantor: Introduce new music into Friday night services.</p>	<p>SMART: Over the next six months, I will introduce and teach five new melodies in Friday night services.</p>

Note: Stretch! Although goals should be achievable, it's totally OK to set one or two goals that are a figurative stretch in order to push the outer limits of achievement. The trust of sacred partnership is critical in feeling safe to stretch.

Align Individual and Congregational Goals

Goals can be both personal and congregational. Congregational goals are generally mission-driven and are measurable against criteria set by the board of directors, and they can be translated to individuals' goals. (While an individual's goal may be tweaked for their specific job, the overarching/guiding goal may be the same.) Congregational goals can be better achieved by finding where the values of the individual charged with achieving the goal will intersect with the values or mission of the organization. Appealing to the individual's values will help them to see the value in working to achieve the institution's goals.³

Looking at the goal of increasing the number of congregants who engage in meaningful Shabbat worship, each member of the professional staff and lay leaders can play a role in achieving this congregational goal, incorporating it into their individual goals. Here is an example of how a goal may be articulated for different members of the professional staff.

Organizational Goal: Increase the number of congregants who engage in meaningful Shabbat worship by 20%.

Role	Goal
Clergy Team	<p>Create monthly worship experiences that engage multi-generational families.</p> <p>For example: Invite members of different longevity to participate in various aspects of Shabbat services. Encourage family to invite entire local extended family to participate in the honor on the bimah: candle lighting, <i>Kiddush</i>, <i>Motzi</i>, opening the Ark, etc.</p>
Executive Director	<p>Develop and implement a plan for engaging congregants in the Shabbat experience through communication and involvement.</p> <p>For example: Ensure the participating families are listed in the Shabbat service program. Create a Google form or other sign up tool for congregants to fill out to volunteer for Shabbat service honors. Promote the system in the monthly bulletin or weekly email newsletter.</p>
Board of Trustees	<p>Define measures of success for assessing worship experiences. Develop and implement a plan to invite members to attend worship.</p> <p>For example, each member of the board of trustees is asked to invite another member or member family to join them at Shabbat services, sit with them during worship, and engage with them at the <i>oneg</i>, introducing them to other members of the congregation. Each month the trustee should invite one family or individual member. Over the course of one year each trustee will have invited a minimum of six members or member families, as it might be beneficial to engage members more than once.</p>
Director of Education	<p>Develop and implement a plan for engaging at least 12 religious school families in Shabbat worship on a monthly basis.</p> <p>For example, encourage religious school students to sign their families up to be honored at services other than the "grade level" services once a year. Create a flyer as a take-home for students to return.</p>

³ Worth, Michael J., "Nonprofit Management: Principles and Practice," SAGE. Page 98.

Quantify the Subjective

So much of synagogue work is subjective, which can make it difficult to define goals. For example, how do you measure member engagement or the quality of the worship experience? Here are two suggestions to consider:

1. Collect feedback and focus goals on improving results. For example:
In six months, 10 of 12 congregants who regularly attend worship and social functions report they have met new people and feel responsible for making new members feel welcome.
2. Focus goals on developing, executing, and reflecting an approach intended to drive results. For example:
Research membership engagement strategies and pilot three activities/programs that are intended to strengthen connections.

Conclusion

One of the things we know from countless conversations with congregational professionals and lay leaders is that a badly managed review is not in anyone's best interest. Implementing a successful review requires a high level of reflection and thoughtfulness on everyone's part. The reward for doing so is a valuable experience that can result in new insights, new goals and directions, and an exploration or strengthening of sacred partnerships that is integral to a healthy congregational system. *B'abtzlachah*, much success, on this important journey.

Appendix A—Best Principles of Values-Based 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 assume that if you replicate practices directly from another congregation, you, too, will achieve the same success. We recommend you view the following best principles as the tenets that undergird your values-based 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 to strengthen and deepen these critical relationships and to arrive at shared understandings regarding the future of the congregation. We recommend reviewing the sacred partnership definition found on page 4 before you begin envisioning your review process. To create a stronger foundation, we recommend the [URJ Sacred Partnership Resource and Discussion Guide](#).

Open Communication

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

A values-based 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 secrecy 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 values-based review everyone is held accountable to the goals established and the process of self-reflection.

As sacred partners, everyone involved in the process must see themselves accountable to one another and to the congregation. Meetings are scheduled in advance and, other than cases of true emergencies, are kept as important and valued time.

Mission-Driven

Values-based review aligns with and serves the congregational mission, vision, and values.

A lack of alignment may indicate a need to formally re-examine 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 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 others' exploration of ideas and approaches. Growth requires support from our sacred partners, encouraging rebounding from missteps and celebrating successes.

Appendix B—Tips for Successful Values-Based Review... And Stumbling Blocks to Avoid

There are certain fundamentals that are found within any process that lead to healthy outcomes and strengthen sacred partnerships. Too often, stumbling blocks prevent a well-intentioned plan from creating the dynamic sought from the review. The following tips for success and known stumbling blocks are based on learnings from congregations that have undertaken successful values-based reviews.

Tip for Success Values-based review works best when all parties look forward to the review process and find it useful and constructive.

Stumbling Blocks

- The review process is one-way, by lay leaders or senior professional staff only, without mutual agreement on the purpose of the review.
 - Review conversations happen only once a year, less often, or not at all.
 - The professional staff member has no advance notice of the review. Or, the review is done in secret, without the professional staff member's input or knowledge.
-

Tip for Success Values-based review sets the tone for dialogue and values both the professional's and lay leader's input. This requires give and take, support, honesty, and both listening to and hearing each other. Conversation encourages mutual understanding and mutual growth, valuing sacred partnerships.

Stumbling Blocks

- The review is public, soliciting input from the congregation by way of a survey and/or inviting private conversations with other professional staff and members.
- Congregational surveys can reduce involved and complex matters, such as worship, to a few variables, thereby providing incomplete and skewed information.
- The reviewer and/or the professional staff member prejudge and/or assume they know the reason for a challenge and/or difficulty.
- Existing conflict between lay leader(s) and professional staff disrupts healthy conversations and the review process.

Tip for Success The reviewers and the reviewee are aware of and understand inherent biases. Personal life experiences provide the foundation for how we each see the world, our attitudes, and the stereotypes that affect our understandings. Bias is natural and, when identified, allows the reviewer to be open to others' perceptions, approaches, and decisions. Review traits such as leadership, attitude, and motivation, understanding that they are subjective. Review objective actions and tangible results.

Stumbling Blocks

- The reviewer and/or the professional staff member prejudge and/or assume they know the reason for a challenge and/or difficulty.
 - The reviewers and the professional staff member are not aware of and do not understand inherent biases. Personal life experiences provide the only lens for the reviewer, with attitudes and stereotypes underlining the review process. Bias is natural and, when not identified, interferes with understanding the other's perceptions, approaches, and decisions.
-

Tip for Success Establish an agreed-upon circle of confidentiality that respects the specific details of the review. The review *process* is not secretive, while the review *details* are confidential.

Stumbling Block There is no protocol for maintaining the confidentiality of review details.

Tip for Success It is wise not to rely on pure memory or one meeting per year. All shared notes and conversations adhere to the agreed-upon rules of confidentiality. In the case where professionals have a lay partner (for example, an educator's lay partner is often the VP of education), ideally the partners are meeting monthly regarding day-to-day matters, reviewing how things are going and problem-solving when needed. These frequent meetings are a part of the ongoing values-based review process.

Stumbling Blocks

- The lay reviewers have little day-to-day contact with the reviewee or the congregation.
- The professional staff member has no advance notice of the review. Or, the review is done in secret, without the professional staff member's input or knowledge.

Tip for Success Separate the review conversations from all contract renewal and compensation discussions. This keeps the focus on the future and provides the opportunity to enhance relationships and goals

Stumbling Block Remuneration is based only on the annual review.

Tip for Success Change and growth for individuals and the congregation will often require both monetary and time commitments. Examine and ensure that the financial resources budgeted by the board will be sufficient to enable both professionals and lay leaders to fulfill stated goals and mutual expectations. Financial and human resources must be appropriately applied and managed. If these are limited or scarce, adjustments in expectations are made.

Stumbling Blocks

- Adequate financial resources are not budgeted by the board to enable professional staff members and lay leaders to fulfill the goals and mutual expectations developed during the review.
 - Adequate human resources (professional staff and lay volunteer) are not planned for or provided, stymieing the goals of the review.
-

Tip for Success Healthy reviews are about looking ahead and not about looking at the past. The review process focuses on what lay and professional leaders can do in contrast to what wasn't done. This lays the groundwork for jointly developing action plans in alignment with the congregation's vision and mission.

Stumbling Blocks

- The review process is focused on the past rather than future planning.
 - The review process provides vague feedback or numerical or letter grades only. These approaches open the door for disagreement and distrust and are de-motivating.
 - No follow-up action plan or assigned responsibilities are established for the lay leader(s) and the professional staff member for the upcoming year.
-

Tip for Success The reviewers and the reviewees both provide feedback on the values-based review process with the ongoing goal of enhancing and strengthening sacred partnerships.

Stumbling Block The professional staff member and/or lay leader is surprised, having no idea about information received at the time of the review and hearing things for the first time. "Secrets" are kept throughout the year as if the other people "shouldn't know."

Appendix C—Values-Based Review Shared Reflection

There is agreement between lay leaders, clergy, and senior professional staff on the purpose of a review process in our synagogue.

Emerging	Developing	Competent	Achieving	Excelling	Not Applicable
This is an area that we need to significantly improve.	We have made some strides but are not yet adept.	We are capable but not yet good.	We do this fairly naturally and regularly, but there is room for improvement.	We do this well and could serve as a role model for others.	We have not yet explored this area.

An appropriate system for clarification of roles and responsibilities has been instituted in the congregation and is integral to the review process.

Emerging	Developing	Competent	Achieving	Excelling	Not Applicable
This is an area that we need to significantly improve.	We have made some strides but are not yet adept.	We are capable but not yet good.	We do this fairly naturally and regularly, but there is room for improvement.	We do this well and could serve as a role model for others.	We have not yet explored this area.

Resources (monetary and/or time) are budgeted appropriately for both the process of review and to fulfill the stated goals and mutual expectations elucidated in the review.

Emerging	Developing	Competent	Achieving	Excelling	Not Applicable
This is an area that we need to significantly improve.	We have made some strides but are not yet adept.	We are capable but not yet good.	We do this fairly naturally and regularly, but there is room for improvement.	We do this well and could serve as a role model for others.	We have not yet explored this area.

Lay reviewers are engaged in congregational life and are respected by the congregation, clergy, and senior professional staff.

Emerging	Developing	Competent	Achieving	Excelling	Not Applicable
This is an area that we need to significantly improve.	We have made some strides but are not yet adept.	We are capable but not yet good.	We do this fairly naturally and regularly, but there is room for improvement.	We do this well and could serve as a role model for others.	We have not yet explored this area.

Clergy and senior professional staff are aware of upcoming reviews and are given the opportunity to contribute input and self-reflection toward the process.

Emerging	Developing	Competent	Achieving	Excelling	Not Applicable
This is an area that we need to significantly improve.	We have made some strides but are not yet adept.	We are capable but not yet good.	We do this fairly naturally and regularly, but there is room for improvement.	We do this well and could serve as a role model for others.	We have not yet explored this area.

The review process is a transparent process, but the details are confidential. Input is gathered from those who are aware of and deeply engaged in the areas under review.

Emerging	Developing	Competent	Achieving	Excelling	Not Applicable
This is an area that we need to significantly improve.	We have made some strides but are not yet adept.	We are capable but not yet good.	We do this fairly naturally and regularly, but there is room for improvement.	We do this well and could serve as a role model for others.	We have not yet explored this area.

Review conversations take place throughout the course of the year and are focused on appraisal, support, and future planning.

Emerging	Developing	Competent	Achieving	Excelling	Not Applicable
This is an area that we need to significantly improve.	We have made some strides but are not yet adept.	We are capable but not yet good.	We do this fairly naturally and regularly, but there is room for improvement.	We do this well and could serve as a role model for others.	We have not yet explored this area.

Review conversations are open and transparent, and are understood as opportunities to build trust, mutual respect, and a culture of sacred partnership.

Emerging	Developing	Competent	Achieving	Excelling	Not Applicable
This is an area that we need to significantly improve.	We have made some strides but are not yet adept.	We are capable but not yet good.	We do this fairly naturally and regularly, but there is room for improvement.	We do this well and could serve as a role model for others.	We have not yet explored this area.

Review conversations are entered into by all parties as an opportunity for change and growth.

Emerging	Developing	Competent	Achieving	Excelling	Not Applicable
This is an area that we need to significantly improve.	We have made some strides but are not yet adept.	We are capable but not yet good.	We do this fairly naturally and regularly, but there is room for improvement.	We do this well and could serve as a role model for others.	We have not yet explored this area.

Inherent biases are understood as natural and are identified as having an impact on each person's own perceptions, approaches, and decisions.

Emerging	Developing	Competent	Achieving	Excelling	Not Applicable
This is an area that we need to significantly improve.	We have made some strides but are not yet adept.	We are capable but not yet good.	We do this fairly naturally and regularly, but there is room for improvement.	We do this well and could serve as a role model for others.	We have not yet explored this area.

Appendix D—Sample Template for Collaborative Review and Goal Setting

We thank Congregation Rodef Sholom from San Rafael, CA, for sharing the process they use to determine goals for the upcoming review period. The leaders at Congregation Rodef Sholom adapted their process from Garold L. Markle’s *Catalytic Coaching: The End of the Performance Review*. We are adapting the congregation’s approach for the purposes of this resource.

The process involves three steps. In the first step, the person being coached (cantor or other professional staff member) fills out a “yellow sheet,” which asks how they have contributed lately to serving the mission and goals of the synagogue—what are their accomplishments (what they set out to do and did) and what are their disappointments (what they set out to do and did not yet accomplish). They are then asked what they have done lately for *themselves* to better support the organization (new skills/competencies, important experiences, new relationships that aid their productive capacity). And finally, they are asked what they would like to be/do in the next year, five years, and in a long-term general aspirational sense. During this part of the process the coach(es) (the members of the review team) simply listens.

The second part of the process is for the reviewer(s) to fill out a “blue sheet,” which is the coach’s assessment of the employee’s strengths, areas for growth (what could be improved), and development recommendations (how to improve). Areas for growth should be listed with specifics, such as including anecdotes or notes from meetings to demonstrate that recommendations are based on facts, not hearsay.

The final part of the process is mutually arriving at a “green sheet,” which is a synthesis of the information from the yellow and blue sheets. In this part, the employee and coach together lay out a personal development plan that lists three or four specific goals and one goal based on the cantor’s or other professional’s “superpower,” whatever that is (examples: charismatic speaker, great fundraiser, empathic listener, great with information technology). This green sheet is then the benchmark for ongoing mutual performance review at agreed upon intervals (quarterly, semi-annually, or annually).

The process creates clarity about the goals for the congregation’s leadership team and is arrived at collaboratively and openly so there are no surprises about what we expect of one another. If there are no significant problems in the leadership team, the three parties use the green sheets to help one another achieve their goals with regular check ins. If there is a glaring problem with the performance of the cantor or professional, this is an opportunity to identify the problem together—in a spirit of coaching and sacred partnership—to improve the problem.

Professional's Input Sheet (yellow sheet)

Name: _____ Job Title: _____

Department/Team: _____ Time in Position: _____

Date: _____ Time w/ Supervisor: _____

1. How have I contributed lately to serving the mission and goals of my congregation?

My accomplishments—what I set out to do and did:

- _____
- _____
- _____
- _____
- _____

My disappointments—what I set out to do and did not:

- _____
- _____
- _____
- _____
- _____

2. What have I done for *myself* lately to better support the organization?

• New skills/competencies I have acquired:

• Important experience I have gained:

- Relationships I have built that aid my productive capacity:

3. What would I like to be when I grow up?

- What I would like to be/do in the next year or two:

- What I would like to be/do in the next five years:

- What I ultimately aspire to be/do:

4. What else would I like you, as my reviewer, to know regarding my professional situation?

Employee Signature: _____

Date Submitted: _____

Reviewer Signature: _____

Date of Discussion: _____

Reviewer's Worksheet (blue sheet)

Employee Name: _____ Reviewer Name: _____

Job Title: _____ Reviewer Position: _____

Time in Position: _____ Date: _____

Strengths

- _____
- _____
- _____
- _____

Areas for growth/improvement

- _____
- _____
- _____
- _____

Development recommendations

- _____
- _____
- _____
- _____

Reviewer(s): _____

Professional: _____

Personal Development Plan (green sheet)

Name: _____ Job Title: _____

Time in Position: _____ Date: _____

Growth Goals This section sets forth an action plan for my personal development and itemizes steps I will take to address no more than four areas for growth from my reviewer’s worksheet or from growth needs highlighted by the other developmental processes.

Goal 1 _____

- _____
- _____

Goal 2 _____

- _____
- _____

Goal 3 _____

- _____
- _____

Goal 4 _____

- _____
- _____

Strengths This section encourages me to give back to the organization by capitalizing on one of my highlighted strengths as listed in my coaching worksheet and/or other developmental feedback.

Goal 5 _____

- _____
- _____

Professional: _____ Date Submitted: _____

Reviewer(s): _____ Date Approved: _____

Appendix E—Template for Documenting and Monitoring Goals

Goal setting is an essential component of professional development because it creates common focus and expectations. You are able to prioritize your day-to-day work knowing what’s most important to accomplish, and you know that you’re in synch with your supervisor and sacred partners because you’ve set the goals together.

As you write goals, keep the SMART model in mind. Your goals should be: Specific, Measurable, Attainable, Relevant, and Time-bound.

Please propose 3-5 personal goals. Describe each one in the goal section. In the comment section please add more detail, including how you will measure success and expected timing to achieve that particular goal.

Goal 1: _____

Comment: _____

Progress _____

Goal 2: _____

Comment: _____

Progress _____

Goal 3: _____

Comment: _____

Progress _____

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 among clergy, professional staff, lay leaders, and the congregation. The values-based review process requires that 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 stream, which is imperative to growth, development, and renewal.

The 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 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](#),” by Daniel Roth, 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 a 20-minute TEDx talk entitled “[How to Use Others’ Feedback to Learn and Grow](#),” Sheila Heen, the Harvard Law School lecturer and co-author of *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* (the Jewish Concept of 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’tzelem 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 the Pardes Rodef Shalom Communities Program entitled “[Can We Talk about This? *Tochacha*: A Study Guide for Constructive Communication](#)” introduces the concept of *tochachah* more broadly as “constructive communication.” The resource is a wonderful guide to understanding *tochachah* as a mitzvah (instructed action), to the practice of *tochachah*, and, importantly, when to refrain from *tochachah*. The study guide reminds us of the importance of doing the necessary inner work before we rebuke or reproach someone else, better enabling us to understand where we are coming from in offering the challenging feedback. We must truthfully consider: Is the feedback coming from a healthy place, or do we want to shame/harm or otherwise be hurtful because of something going on within ourselves? When we offer difficult feedback, it is always imperative to consciously know that our words will not do more harm than good.

Appendix G—Resources and Additional Reading

We believe these resources, some mentioned throughout this guide and some not, will be helpful as you develop and implement your review process. This list is not exhaustive; rather, it is a starting point.

- *URJ Sacred Partnership Resource and Discussion Guide*
- “10 Tips for Constructive Feedback from the Rambam,” from Pardes, by Daniel Roth
- “Can We Talk about This? Tochacha: A Study Guide for Constructive Communication,” from Pardes Rodef Shalom Communities Program, Rabbi Dr. Daniel Roth, project leader, Rabbi Amy Eilberg, program director and author, and Elisheva Blum, editor
- *Catalytic Coaching: The End of the Performance Review*, by Garold L. Markle
- *Creating Your Strategic Plan*, 3rd edition, John M. Bryson and Farnum K. Alston
- “Governance as Leadership: Reframing the Work of Nonprofit Boards,” from Boardsource, by Richard P. Chait, William P. Ryan, and Barbara E. Taylor
- “How to Use Other’s Feedback to Learn and Grow,” TED Talk by Sheila Heen
- Lewis Center for Church Leadership Wesley Theological Seminary, churchleadership.com
- “Measuring ministry impact takes years,” from Faith & Leadership, by David L. Odom,
- “Nonprofit Management: Principles and Practice,” by Michael J. Worth

Union for Reform Judaism | 633 Third Avenue, New York, NY 10017
NYC: 212-650-4000 | Washington D.C. (RAC): 202-387-2800
Knowledge Network: URJ1800@URJ.org | urj.org

