

## **Executive Director -- Job Expectations**

### ***I. Communication***

- ✓ Membership: New member processing, Bar/Bat Mitzva recognition program, Weekly Brief, Bulletin boards.
- ✓ Board of Directors: Provide current information (new member applications, meeting notices, minutes distribution), Set up room, Order food.
- ✓ Rabbi: Keep him informed regarding individual members' life events, correspondence, member concerns, maintain his schedule of classes.
- ✓ Committees: Staff support for all committees including Nerot (see attached list)
- ✓ Intershul: Maintain collegial relationships, keep information on other shul services, promote events of mutual interest.
- ✓ Community: First contact for new families/potential members. Promote our events through media and email.

### ***II. Financial Management***

- ✓ Receivables: Assist bookkeeper with check entry and deposits, member statements, and annual tax statements.
- ✓ Payables: Open mail, verify accuracy of invoices before turning them over to the bookkeeper.
- ✓ Payroll: Schedule and report payroll to the bookkeeper for the Rabbi, the custodian, and myself.

### ***III. Vendor and Utilities Management***

- ✓ Review all contracts
- ✓ Comparison shop for better service and pricing
- ✓ Check invoices and compare to work orders
- ✓ Maintain and review insurance coverage

### ***IV. Income Generation***

- ✓ Rental: Process rental requests from members and non-members, schedule, service, bill.
- ✓ Advertising: solicit ads, create ads.
- ✓ Fund-raising: assist each committee as needed (i.e. Dinner, High Holiday seating, Yom Kippur appeal, Kiddush, Arba Minim, Nerot), promote fund-raisers, report results.

### ***V. Coordinate Building Maintenance/Security***

- ✓ Coordinate Cleaning and Setup: Daily, weekly, special for holidays and events
- ✓ Repairs
- ✓ Inspections: Elevator, fire extinguishers, kitchen fire system, fire sprinkler system, sewer pumps
- ✓ Alarm and Security Cameras
- ✓ Lawn/snow/irrigation
- ✓ Garbage pick-up
- ✓ Pest control
- ✓ Supplies: Cleaning products, tablecloths, paper goods for kiddushim, bathroom products, light bulbs, chairs.

## **VI. Office Operations**

- ✓ Maintain database of all members, affiliates, special mailing list, one-time contributors, renters [Recently added a second database program, doubling the amount of time required for inputting data]
- ✓ Maintain Cemetery files
- ✓ Telephone: Answer all incoming calls (at office and at home)
- ✓ E-mail: Respond to all emails
- ✓ Snail Mail: Open incoming mail, prepare all outgoing mail, deliver to post office, replenish bulk account
- ✓ Maintain office equipment (computers, printers, copier, fax, folding machine, credit card processor)
- ✓ Order supplies: Paper, envelopes, toner, desk supplies, postage
- ✓ Filing
- ✓ Errands: Bank, Post Office, Printer, Supply store, Staples, Deliveries to members.

## **VII. Supervision**

- ✓ Custodian: Give him daily schedule, maintain needed supplies
- ✓ Bookkeeper: Counsel and provide information, provide training on our systems
- ✓ Volunteers: Recruit for special projects

## **VIII. Holidays/Shabbat – Coordinate Planning, Implementation, & Follow-up**

- ✓ Rosh Hashana/Yom Kippur: Seating, Yizkor, Minyanim, Youth programs
- ✓ Sukkot: Sukkah, Arba Minim, Youth programs
- ✓ Chanukah: Youth programs
- ✓ Purim: Mishloach Manot, Megilla readings, Youth programs
- ✓ Pesach: Cleaning
- ✓ Shavuot: Tikun Leil

## **IX. Scheduling**

- ✓ Bar/Bat Mitzva children's meeting with Rabbi
- ✓ Rabbi's classes and Adult Education shiurim
- ✓ All rentals: Members and non-members
- ✓ Minyanim: Carlebach, Zman, Holidays
- ✓ All shul/Nerot events
- ✓ Mailings: monthly statements, events, fund raisers, newsletter
- ✓ New vendor appointments
- ✓ Repairs
- ✓ Cleaning and Room set up
- ✓ Deliveries
- ✓ Inspections
- ✓ Security guards
- ✓ Custodian's time

**X. Value Add**

- ✓ Member relations - ongoing
- ✓ Established and maintained relationships with other shuls and organization such as UJA Federation
- ✓ Business management
- ✓ Service to community
- ✓ Central resource for information and referral
- ✓ Public face (at work and in the community)

**XI. Additional Tasks and Processes Which are Necessary to Implement-Time Allowing**

- ✓ Increase service to renters
- ✓ New-member welcome program
- ✓ Advertising on web site
- ✓ Revise contracts: rental, membership application
- ✓ Increase personal correspondence to membership from the Rabbi and President
- ✓ Regular yahrzeit update, reminder letters
- ✓ Improve Bnai Mitzva Recognition Program
- ✓ Frequent updates/comparisons with other shuls for better decision-making

**Persons and Committees to whom/which I provide clerical and technical assistance**

President of the Board

Youth Department: Chair & Director (Year round)

NCSY, Jr. & Sr.

Nerot: Presidium & event chairs (Year round)

Scheduling/set up

Mishloach Manot

Boutiques

Annual Woman of the Year Seuda Shlishit

New families moving into community

New babies

Seforim dedications

Other events: lectures, bake sale, etc.

Seating Committee chair (June-Oct)

Create Reservation form/confirmation cards/mailings

Take reservations/post charges

Update chair

Reserve Whittier

Rent equipment

Order supplies

Del's schedule

Yom Kippur Appeal (Aug-Sept)

Print pledge cards

Mail appeal letter

Report results

Israel Action Committee (Year round)

Solicit articles for Kol Rinat

Assist with Israel Mission

Special projects, e.g. Otniel

Gabbaim: (Year round)

Publish monthly yahrzeit

Mishaberach list (add/delete) keep gabbai informed

Schedule minyanim

Bring down machzorim (and others) when appropriate

Aveilus: In the event of a death... (Year round)

Inform Rabbi Adler, Heidi Fuchs

Initiate shiva call

Print and mail shiva card

Sometimes speak to family to assess need

Adult Ed: (Year round)

Schedule & publicize shiurim

Dinner/Journal: chairs & Committee Members (Nov-Mar)

Ad blanks/mailings

Invitations

Take reservations/ads

Daily updates to entire committee concerning income/reservations

Arba Minim: (Sept-Oct)

Create sales form/mail

Receive orders

Schedule pick-up

Report results to chair

Minyanim:

Carlebach

Zman

Special holiday (i.e. Whittier, Megilla, Tikkun Leil)

Security:

Schedule crossing/security guards

Alarm

Cameras

Publications:

Monthly Newsletter

Remind the Rabbi, president, Nerot, youth director, adult education chair, and IAC to get their articles in on time

Type Rabbi's article

Solicit new and confirm renewal of ads

Do the full layout

Schedule editing

Deliver to printer

Label and deliver to post office

Weekly Brief

Gather information pertinent for the upcoming week

Update the week's schedule

Type all information

Copy and distribute

Directory

Verify database information

Design directory

Print and mail