



**HEBREW UNION COLLEGE –
JEWISH INSTITUTE OF RELIGION (HUC-JIR)**

Cincinnati – New York City – Los Angeles – Jerusalem

Chief Administrative Officer (CAO)

POSITION SPECIFICATION

Prepared by
EDUCATIONAL MANAGEMENT NETWORK
a division of Witt/Kieffer

April 2003

This position specification is intended to provide information about
HUC-JIR and the position of Chief Administrative Officer.
It is designed to assist qualified individuals in assessing their interest.

Chief Administrative Officer (CAO)

HEBREW UNION COLLEGE – JEWISH INSTITUTE OF RELIGION

Cincinnati – New – York City – Los Angeles – Jerusalem

THE OPPORTUNITY

Hebrew Union College–Jewish Institute of Religion (HUC-JIR) is the academic, spiritual and professional leadership development center of Reform Judaism. Rabbi David Ellenson, Ph.D., a highly regarded scholar of American Judaism, was appointed President in 2001. As he develops and carries out his vision, he wishes to appoint a Chief Administrative Officer to assist him with the internal operations of HUC-JIR, and with the strategic and financial planning functions that will be essential to its future success.

HUC-JIR, with schools in Cincinnati, New York City, Los Angeles and Jerusalem, is a complex and vibrant institution that is energized by its powerful mission: to serve as a place of education, a religious community, and a resource to the Reform Movement worldwide. The College invites inquiries, nominations, and applications for the position of Chief Administrative Officer. The position is available immediately and will be based on the Cincinnati or New York campus, with frequent travel to the other locations expected.

HUC-JIR: AN OVERVIEW

Founded in 1875, Hebrew Union College-Jewish Institute of Religion is the nation's oldest institution of higher Jewish education. HUC-JIR educates men and women for service to American and world Jewry as rabbis, cantors, educators, and communal service professionals, and offers graduate and postgraduate degree programs to scholars of all faiths. HUC-JIR's scholarly resources comprise renowned library, archive, and museum collections, biblical archaeology excavations, and academic publications. HUC-JIR invites the community to an array of cultural and educational programs that illuminate Jewish identity, history, and contemporary creativity, and foster interfaith and multiethnic understanding.

When Rabbi Isaac Mayer Wise, the founder of American Reform Judaism, came to America in 1846, he encountered a frontier Jewry of 40,000 people. There was but one ordained officiating rabbi in all of America.

Wise understood the urgent need for rabbinical training and standards for those who would provide progressive, enlightened, and modern spiritual leadership for the American pulpit. At a time when Christian denominational colleges were springing up by the score, Wise was certain that an institution of higher Jewish learning would guarantee Jewish survival in America.

And so, in 1873, with an American Jewish population exceeding 150,000, Wise was the catalyst for the creation of the Union of American Hebrew Congregations, with its twenty-eight congregational founding members, in order to support the establishment of a “Hebrew Theological Institute.” In 1875, the Hebrew Union College was launched in Cincinnati, the first permanent Jewish institution of higher learning in the New World.

The liberal and pluralistic ethos of Wise’s seminary was amplified through its merger in 1950 with the Jewish Institute of Religion. Founded in 1922 in New York by Rabbi Stephen S. Wise, the renowned advocate of social justice and human rights, the Jewish Institute of Religion was conceived as an institution serving all streams of Judaism.

A third center was opened in Los Angeles in 1954 to serve the growing Jewish community on the West Coast. A fourth branch was established in Jerusalem in 1963 to serve as a post-doctoral school of archaeological and biblical studies. Since 1970, it has grown to serve as the center for the College-Institute’s Year-in-Israel Program and the Israel Rabbinical Program, and as the academic center for the Progressive Movement in Israel.

Today, Hebrew Union College-Jewish Institute of Religion is an international seminary and university of graduate studies offering a wide variety of academic and professional programs. In addition to its Rabbinical School, the College-Institute includes Schools of Graduate Studies, Education, Jewish Communal Service, Sacred Music, and Biblical Archaeology.

Recent outside observers of HUC-JIR, following visits to campus in 2002, commented on some of its extraordinary strengths:

- “a sound academic program, an energetic and highly committed faculty, bright and enthusiastic students..., excellent library resources, and experienced and articulate academic leadership” (WASC Accreditation Team Report, page 7).
- “The people are the great strength of HUC-JIR. This family is a blessed and a gifted family” (MSA Accreditation Team Report, page 1).

Clearly the powerful mission of HUC-JIR is a source of unity and commitment to the institution:

Mission Statement

Hebrew Union College – Jewish Institute of Religion is a religious and scholarly learning community dedicated to:

Developing Jewish professional and lay leaders to transmit and apply to contemporary life the sustaining values, responsibilities and texts of the Jewish tradition;

Applying the open and pluralistic spirit of the Reform movement to the study of the great issues of Jewish life and thought;

Advancing the critical study of Jewish culture and related disciplines in accordance with the highest standards of modern academic scholarship.

More information about HUC-JIR may be found at its Web site: www.huc.edu. Other related websites include www.rj.org, www.uahc.org; www.ccarnet.org; www.wupj.org; www.rj.org/wrj.

PROGRAMS

Each of HUC-JIR's four schools has a distinctive array of programs and facilities, but there are some significant common features among the programs. All students in these programs must learn Hebrew, and many have achieved high levels of proficiency before they enroll. The Provost has led the effort to create a single core curriculum for the Rabbinic Studies Programs in all the schools; the new curriculum is in the process of implementation, and that is expected to lead over a period of time to a reshaped core curriculum in the other professional programs as well.

Every student in the rabbinic, cantorial and education programs must spend the first year of study at the Jerusalem campus, returning for the remainder of his or her program to one of the U.S. schools. The Year-in-Israel program has been challenged by the political situation there, and some students have been permitted to defer this activity this year, but the program has been sustained with these temporary adjustments; in fact, two-thirds of the students elected to go to Israel for the Year-in-Israel program. This reflects the strength of the underlying commitment; HUC-JIR is unique among all North American seminaries in this requirement, which provides an opportunity for students to study Hebrew and a wide array of subjects linked to their future vocations as *klei kodesh* (holy vessels) for the Jewish people, as well as the commitment of the institution to the State of Israel.

The New York school (One West 4th Street) is housed in a single five-story building adjacent to the campus of New York University in Greenwich Village. There is some joint programming with New York University.

- School of Rabbinic Studies: Enrolls approximately 70 students in four years of a five-year program of study leading to ordination
- School of Sacred Music: Enrolls approximately 10 students four years of a five-year program that leads to investiture
- School of Education: Enrolls approximately 12 students in a program that leads to the degree in Master of Arts in Religious Education
- Graduate Programs: Enrolls approximately 35 students in programs that lead to the Doctor of Ministry, Doctor of Hebrew Letters, and Master of Arts in Jewish Studies degrees
- Resources available to the community include a museum, library, courses, lectures, and concerts.

The Cincinnati school (3101 Clifton Avenue) is composed of eight buildings on an 18-acre campus and is the most "collegiate" in appearance. It is adjacent to the campuses of the University of Cincinnati, and there are some joint programs with that institution and with nearby Xavier University.

- School of Rabbinic Studies: Enrolls approximately 70 students in four years of a five-year program of study leading to ordination

- Graduate School: Enrolls approximately 70 students in several graduate programs in Judaic Studies, leading to the degrees of Ph.D., M.Phil., M.A., and D.H.L.
- Klau Library: One of the most extensive Jewish libraries in the world. With 420,000 printed items of Judaica, the Library is the second largest collection of printed Judaica in the world.
- American Jewish Archives: Described by the NCA Accreditation Team as an “outstanding academic resource,” the Archives have an automated card catalogue with 400,000 bibliographic records on line.
- Other resources available to the community on the Cincinnati campus include the Skirball Museum Cincinnati, the Center for the Study of Ethics and Contemporary Moral Problems, the Center for Holocaust and Humanity Education, the Archaeology Center, and an array of courses, lectures and concerts.

The Los Angeles school (3077 University Avenue) is housed in two adjoining buildings adjacent to the campus of the University of Southern California; there are many joint programs between HUC and USC, and HUC serves as USC’s Department of Judaic Studies through the Jerome H. Louchheim School of Judaic Studies. This relationship provides a substantial flow of students—more than 500 students in the Louchheim School courses each year—and tuition revenue to HUC, as students enrolled at USC often cross-register for HUC’s programs.

- School of Rabbinic Studies: The Los Angeles school for many years did not provide the final two years of study for the rabbinate, sending students to Cincinnati or New York for ordination. In 2001, the L.A. school was authorized to provide the full program of study leading to ordination. The First Ordination Class was 2002. The school now enrolls approximately 70 students in four years of a five-year program leading to ordination.
- The Rhea Hirsch School of Jewish Education: Enrolls approximately six students in programs that lead to the Master of Arts degree in Jewish Education, plus five students in joint MAJE/MAJCS; and five students in graduate programs
- School of Jewish Communal Service: Enrolls approximately 16 students each year; most of the students in these programs take dual degrees with USC in the Schools of Social Work, Public Administration, Communications and Business
- Resources available to the community include Torah study, conferences, Shabbat services, and lectures.

The Jerusalem school (13 King David Street) is the newest of HUC’s locations, built in 1963. It is a striking modern structure that serves both as the location for the Year-in-Israel program for U.S. students, and as the focal point for Reform Judaism in Israel.

- School of Rabbinic Studies: Currently has an enrollment of approximately 35 students. This is a very important activity in terms of the mission and future of the College, and of Progressive Judaism in Israel.
- Year-in-Israel Program: The Jerusalem campus houses the first-year students of the stateside campuses, creating a total student body of approximately 70, including rabbinical, cantorial, and education students.

- Other resources include the Nelson Glueck School of Biblical Archaeology; Beit Midrash/A Liberal Yeshiva, The Skirball Center for Biblical and Archaeological Research and Museum, The Abramov Library, Archaeological Excavations at Tel Dan, as well as services, concerts and lectures at the Murstein Synagogue on campus.

Accreditation of HUC-JIR's three U.S. locations is carried out by three regional accrediting bodies. The NYC school is accredited by the Middle State Association (MSA), the Cincinnati school is accredited by the North Central Association (NCA), and the Los Angeles school is accredited by the Western Association of Schools and Colleges (WASC). The three self-studies that led up to the accreditation visits to each school, and the visits themselves, were coordinated in 2001-2002 so that they were virtually simultaneous. This is a considerable improvement over previous years when the accreditation cycles were not synchronized across the regions. Some have expressed the hope that at some future time there might be a single accreditation process for all three schools.

Although each school has different issues, and each visiting accreditation team had its own approach and perceptions, there were several common themes across the three team reports. Financial health and strategic planning were areas of concern in all three reports. The appointment of a CAO grows directly out of concerns raised in the accreditation reports.

ORGANIZATIONAL STRUCTURE

Because HUC-JIR has four Centers of Learning, it has an especially complex organizational structure; the issues of geography and organizational structure are fundamental to the issues that the CAO will be addressing. Each school has a distinctive culture that reflects its location, its history, the particular group of people who work there, and the student body. Each school has particular issues to be addressed (e.g., deferred maintenance is a more significant issue in Cincinnati, where the buildings are much greater in number and older). Each school has a particular relationship to the national HUC-JIR staff. One of the complexities of the HUC organizational structure is that some of the administrators are "national staff" and some are "campus staff." National staff members who are physically located at one of the schools have a distinctive status; they work in the same offices as their school-staff colleagues but have different communication and reporting relationships.

Governance of the institution as a whole is the responsibility of the Board of Governors. The Board has 55 members, including 28 who are selected by the Union of American Hebrew Congregations in consultation with the Nominating Committee of the Board, 11 who are selected by the Alumni Association of HUC-JIR, and 15 who are selected by the Nominating Committee and the other members of the Board. The CAO works closely with the Budget and Management Committee, the Strategic Planning Committee, and the Audit Committee of the Board. In addition to the Board of Governors for the institution as a whole, each of the three U.S. schools and the Jerusalem School has a Board of Overseers, but the function of these Boards of Overseers is advisory and supportive of its particular school; the Overseers are not linked directly to the CAO.

The national administrative staff and its leadership team are critical to the functioning of HUC-JIR. The leadership team is headed by the President. Reporting to him are the Provost, Vice President for Development, and the CAO. The Vice President of Finance is a critical member of the senior administrative reporting to the CAO.

Other positions reporting directly or indirectly to the CAO are:

- The functions that report to the Vice President of Finance (the Office of Business and Financial Affairs), all located on the Cincinnati campus, will become indirect reports to the CAO. These include:
 - Budget Office
 - Accounts Payable
 - Payroll Office
- Technology and Telecommunications
- Human Resources
- Risk Management
- Buildings and Grounds
- Strategic Planning (there are no staff in this area at this time)

Presidents of the institution previously lived in Cincinnati, but the current President lives in New York. The national officers based in the New York City office include the Provost and Vice President for Development. The Cincinnati campus houses the Vice President of Finance, the Office of Business and Financial Affairs, and other administrative functions. Wherever the CAO lives, he or she will need to travel to the other locations frequently, providing oversight for the administrative functions, and becoming part of the close-knit team of the President, Provost, Vice President of Finance and Vice President for Development.

THE ROLE OF THE CHIEF ADMINISTRATIVE OFFICER

The CAO will have a wide range of executive responsibilities for managing various administrative functions at the College in support of the President's Office. He or she will work closely with the President, the Provost, the Vice President for Development, the Vice President of Finance, and the Board of Governors to promote the institutional vision and to ensure that all four schools function efficiently and effectively. (N.B.: A similar position to the CAO existed previously but has been substantially redefined in preparation for the current search. The accreditation reports, described elsewhere, and the advice of several consultants persuaded the President and the Board of Governors that a sustained effort was needed to address issues of institutional vision and functioning of the four schools, and that a position dedicated to that effort was essential.)

As a member of the President's senior administrative team, the CAO is expected to support the President's vision by monitoring and protecting the resources that are required to implement that vision. In the early years of his or her appointment, the CAO will be expected to begin to:

1. Establish and implement policies and procedures in several key areas.
2. Integrate and coordinate the administration of the four locations, with attention to building and strengthening a system of communication.
3. Formulate and lead an institutional strategic planning process to enable HUC-JIR to:
 - a. Achieve financial equilibrium, i.e., the capacity, over the long term, to balance not only operating revenues and expenditures, but also other significant investments such as capital construction, plant maintenance, and technology.
 - b. Make important and perhaps difficult decisions, both short-term and long-term, that will be required in order to fulfill the institutional mission.

Each of the elements of the position description will be discussed in greater detail during candidate interviews. The following observations provide some initial sense of the issues underlying the most important responsibilities:

- Establish and implement policies and procedures in several key areas. The management of HUC-JIR has been more informal than most institutions, and policies and procedures have yet to be devised on a variety of key issues (e.g., the institution does not have a complete set of position descriptions for staff members, or a process of and regular schedule for performance appraisal; reimbursement procedures are cumbersome and slow, and payments to vendors are sometimes delayed). The CAO will want to consider both best practices and local traditions, and strive to enhance the general administrative functioning of the institution.
- Integrate and coordinate the administration of the four locations, with attention to building and strengthening a system of communication: The four locations of HUC-JIR reflect the rich history of Reform Judaism and provide extraordinary opportunity today for all members of the HUC-JIR community. Each location has developed a very different organizational culture. Having four locations creates significant organizational challenges; coordination among the academic programs has been strengthened by the Provost, but similar work is now needed in administrative areas. The CAO will want to build a strong communication network so that faculty and staff at all the schools are kept informed and appropriately involved and trained as new approaches are established. While video facilities enhance communication, being present in person is essential as well.
- Formulate and lead an institutional strategic planning process: Rabbi Ellenson is addressing a wide range of difficult issues in the early years of his presidency. Prominent among these issues is the need to achieve financial equilibrium, i.e., the capacity, over the long term, to balance not only operating revenues and expenditures, but also other significant investments such as capital construction, maintenance of plant, and new technology. The CAO will provide leadership for the planning function and provide the informational foundation for critical decisions, being mindful of the powerful academic and religious mission, the complex geography and history of the institution, and the deep loyalty and commitment that many have made to HUC-JIR over the years, as well as the need to achieve greater financial stability. The regional accrediting bodies for all three schools have commented on the need to strengthen institutional strategic planning, and the appointment of the new CAO is part of assuring the accreditors of the continuing

strength of the College-Institute. As the MSA team observes, “the President will need to create a “cold” data-driven “culture of evidence” and carefully balance it against the “warmth” of an “everybody knows everybody” familial mentality. However, the Team has every confidence in the maturing “Abraham” and his Team to produce a sound answer” (MSA report, page 13).

RESOURCES

The all-funds annual operating budget for HUC-JIR is \$36.1 million in 2002-2003, with a budgeted deficit of \$1.1 million. As of June 30, 2002 the endowment’s book value was \$66.2 million and the assets in the institution’s defined benefit pension fund approximately \$20 million.

The annual operating budget’s four major revenue components are:

- 40% from HUC’s share of the annual dues paid by the member congregations of the Union of American Hebrew Congregations
- 17% from tuition and fees
- 10% from the College-Institute’s endowment spending policy
- 25% from annual donations

Like many small colleges, HUC-JIR has been challenged financially in recent years. There have been deficit budgets for the last two years, covered by a combination of drawing down the quasi-endowment, and gifts from generous donors with a deep commitment to HUC-JIR. The quasi-endowment was approximately \$8.1 million in 2002, but this fund has been declining through transfers of approximately \$4 million each year needed to balance the operating budget. In recent years, the average increase in revenues has been 8 percent annually, but the average increase in expenses has been 9.1 percent annually. To begin to control expenses, recent salary increases have been held to two percent, and some benefits have been reduced. The growing problem thus clearly requires a long-term solution, and efforts have been made to move in that direction.

Rabbi Ellenson has given vigorous leadership and personal commitment to bringing additional resources to HUC-JIR. A capital campaign is currently in progress, with a goal of \$135 million: \$40-45 million for the annual operating budget, \$65-70 million to double the endowment, and \$25 million for campus and infrastructure enhancements. Scheduled to conclude in 2006, the campaign is in its “quiet” phase and scheduled to become public in 2004. Over \$54 million has been raised to date. Campaign goals include: recruiting students of great academic promise in greater numbers; recruiting, supporting, and retaining renowned scholars to the faculty; developing innovative programs and curricula; supporting the libraries, museums, and archives; enhancing the academic program through technology; and enhancing the physical plant and infrastructure. Among the major gifts to the campaign are a center for intellectual and cultural life on the New York campus; a center for pastoral counseling; special funds for faculty development; special scholarship funds (e.g., for interfaith scholars), and two endowed chairs.

Efforts to build on HUC-JIR's great strengths are essential but costly. The MSA accreditation report comments on this. "Under the leadership of the past president, the Board endorsed a visionary plan of institutional renewal including hiring of additional faculty, substantial raises for current faculty and other program enhancements. However the institution implemented the plan without first securing underlying resources. Presently, the institution has approved and incurred annual budgets with significant deficits. When paired with budgeting heavy reliance upon endowment income, the resulting draws on the endowment have eroded, to some extent, the permanent financial base of HUC-JIR" (MSA report, page 11).

Clearly the financial health of the institution, fund-raising efforts, and planning are interdependent. The WASC accreditation team observed, "The administration has taken the initial steps to set up an effective process of strategic planning. The need is especially urgent, given the short-term deficit in the HUC-JIR budget. Even the task of increasing fund-raising will be facilitated if potential donors can see that the College has a strategic plan to guide it in using its resources wisely. Of more immediate concern is the need for an overall assessment of the College's priorities in the light of available resources. In no other way can the administration be sure that it will have the means to increase revenue and/or reduce expenses so that the short-term deficit in accounts is addressed effectively" (WASC report, page 27).

QUALITIES AND QUALIFICATIONS

The ideal candidate will have the following professional qualifications and personal characteristics:

Professional qualifications

- Strategic financial planning: Strong skills in financial management and strategic planning, sufficient to provide leadership for both long-term and annual resource allocation, and to assist the College to achieve financial equilibrium;
- Communication and interpersonal skills: Strong communication and interpersonal skills, including the ability to speak and write clearly and effectively, and to assist others in grasping the complexities of financial management and planning;
- Collaboration and accountability: The ability to be both collaborative and assertive, working effectively in close partnership with the President and with the other senior officers, the Board and the HUC community; and simultaneously providing a strong voice for fiscal responsibility and accountability;
- Experience with multi-location institutions: Experience bringing a holistic sense to a complex institution and an understanding of the complexities associated with a multi-location structure;
- Technological expertise: Sufficient technological expertise to guide the upgrading and integration of data management systems;
- Experience working with and supporting a governing board: Successful experience working with a governing board of trustees or directors and providing timely and accurate information to support processes of deliberation and decision-making;

- Educational credentials: A master's degree (business administration, educational administration, human resources management, or a related field) or equivalent experience;
- Familiarity with the financial issues and culture of higher education: Both corporate and academic backgrounds are appropriate for this position, and candidates are welcomed from both sectors; candidates (particularly those whose background is not primarily in higher education or non-profit organizations) should describe their familiarity with the critical issues of higher education and affinity for its culture and its mode and pace of decision-making, or their openness to gaining familiarity with this sector.

Personal characteristics

- Personal qualities: Personal qualities including integrity, confidence, leadership ability, collegiality, and the ability to form strong collaborative relationships;
- Commitment to mission: Resonance with and willingness to support the mission of HUC-JIR, and ability to represent the mission and values to others.

PROCEDURES FOR CANDIDACY

Nominations, applications, and letters of interest should be submitted, in confidence, to the consultants who are assisting HUC-JIR with this search:

Jean Dowdall, Ph.D., and Jane Courson
 EMN/WITT/KIEFFER
 Phone: 508-228-6700
 FAX: 508-228-6484
huc@emnemn.com

Submission of materials by e-mail using MSWord attachments is very strongly encouraged. Items that cannot be sent by e-mail may be mailed to the consultants at 98 Old South Road, Nantucket MA 02554-6091. Before preparing their materials, candidates are urged to consult the Web site (www.huc.edu) and the position specification, which is available by email from the consultants. Candidates should provide a resume and a cover letter describing their interest in and qualifications for the position, and the names, telephone numbers and email addresses of at least five references; candidates will be notified before references are contacted.

The search schedule calls for review of candidate materials to begin April 25; for full consideration, materials should be submitted by that date. The Search Committee anticipates holding preliminary interviews in early June, and expanded on-campus interviews later in June, with a selection and appointment soon afterward.

HUC-JIR is an Equal Opportunity Employer

The material presented in this position specification should be relied on for informational purposes only. This material has been copied, compiled, or quoted in part from HUC-JIR documents and personal interviews and is believed to be reliable. Naturally, while every effort has been made to ensure the accuracy of this information, the original source documents and factual situations govern.

Educational Management Network

EXECUTIVE SEARCH CONSULTANTS

EMN is a division of Witt/Kieffer

Educational Management Network/a division of Witt/Kieffer is the nation's leading executive search firm dedicated to serving education, health care, and not-for-profit communities nationwide. Our mission is to identify outstanding leadership solutions for organizations committed to improving the quality of life. EMN/Witt/Kieffer has served more than 800 colleges and universities, as well as community, cultural, and service organizations. We focus on searches for presidents/chancellors; provosts; vice presidents for advancement, finance, student affairs, enrollment management, and technology; deans; and directors of major service/academic units.

info@emnemn.com

<http://www.emnemn.com>

For this search, direct e-mail to:

huc@emnemn.com