

Aytza Tova for Rabbi and Successor/Emeritus Rabbi
Coordination and Communication

By Rabbi Richard Hirsh June 2011/Sivan 5771, updated May 2012/Iyar 5772

{Note: These guidelines use the congregational rabbinate as the presumed setting, but could be adapted for other settings where rabbinic transitions occur, such as in a campus chaplaincy.}

PREFACE: Section XIII, paragraph C of the RRA Ethics Code states: “The emeritus and/or predecessor rabbis should officiate at life-cycle events of their former congregants only with the explicit permission of the new rabbi.” While the *kavanna* of this statement embodies a sense of *k’vod harav* that we presume RRA members (and other rabbis) share, as applied to day-to-day rabbinic life “explicit permission” is in need of some commentary by way of principles, pragmatism and procedures. This document, while not an official statement of guidelines adopted by the RRA, can be considered *aytza tova*.

I. Introduction

When a congregational rabbi retires, becomes emeritus, or leaves her/his position [whether remaining in the community or relocating], everyone benefits from the establishment of clear guidelines, expectations, understandings, policies and/or procedures for communication and coordination between the new rabbi and the former rabbi.

While long-term navigation of rabbi-to-rabbi relationships remains important, the transitional year and the years immediately following require the most attention, as requests from congregants (and perhaps synagogue staff members as well) to the former rabbi for officiation and/or participation in life-cycle events tend to be highest in that cycle and then decline over time.

The rabbis have responsibilities and relationships to each other as colleagues, to individual members of the congregation and to the congregation as a whole. Managing the transition helps to reduce situations of triangulation among the rabbis and congregants or congregational families and can avoid situations of conflict and confusion.

II. Context

The Rabbi-Congregation Relationship: A Vision for the 21st Century [the Report of the Reconstructionist Commission on the Role of the Rabbi, January 2001], includes a helpful section dealing with “integrating the new rabbi into the congregation” [pp. 61-64]. Among the key insights there is the understanding of the congregation as a system in which all the parts are interrelated and thus affect each other as well as the whole.

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Both the new and former rabbis are parts of the system, regardless of whether the former rabbi remains in the community. What each does affects the entire system.

Among the key insights of this report relevant to rabbinic transitions:

- The arrival of a new rabbi means change, and change is often accompanied by anxiety.
- Both rabbis and lay leaders can help alleviate anxiety and ease the new rabbi's integration into the community by modeling ways in which change can be accommodated and directed rather than resisted or avoided.
- The inevitable changes that accompany the arrival of a new rabbi generate disequilibrium.
- When a new rabbi is following another rabbi, the congregation leaders need to monitor and manage the process of closure with the previous rabbi.
- "People don't resist change; people resist loss" is an observation made by organizational consultant Ronald Heifetz in his book *Leadership Without Easy Answers*. What from a systemic and organizational perspective is a transition in rabbinic leadership may be experienced by a given congregant as a personal loss of relationship with the prior rabbi. Acknowledging that rabbinic transitions necessarily include a dimension of loss can help place in context requests for on-going officiation by the prior rabbi.

Both rabbis and the congregation, especially the congregational leaders, should share an understanding that core tasks of the first year include integrating the new rabbi into the congregation and building the relationship between the new rabbi and the congregation. It is imperative to avoid creating systemic issues that can derail or sidetrack those processes. The first year is essential for building a foundation for the future. The initial stages of the new rabbi-congregation relationship need to succeed, as the opportunities of the first year do not present themselves again.

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III. Roles and Responsibilities

The responsibility for managing the rabbi-to-rabbi transition lies primarily with each rabbi and with the congregation leaders. Once a new rabbi has been named, even before she or he arrives in the congregation, communication between both rabbis should take place. Those discussions should inform conversations between the current rabbi and the lay leaders before the current rabbi leaves.

Discussions between the two rabbis in this period should focus on: (1) communication expectations (2) creating a consistent system that both of the rabbis, staff, lay leaders and congregants can reference when requests for the prior rabbi's participation in life-cycle events arises and (3) establishing a set of norms and procedures that can minimize inappropriate requests, reduce confusion in communication, and clarify "who gets called first." A shared understanding between the rabbis supports the systemic goals in the context of the first year(s) of the new rabbi's relationship with the congregation.

Experience shows that the optimal situation is for the outgoing rabbi and lay leaders to discuss any continuing role(s) in advance of the rabbi's departure and agree upon a set of guidelines for managing requests for life-cycle officiation and/or participation. Communicating that agreement to the congregation helps to support the growth of the new rabbi-congregation relationship.

Such an arrangement avoids the awkwardness that can result when the member or family contacts the prior rabbi first and arrangements are made, whether implicit or explicit, that are then presented to the new rabbi *b'diavad*. At such a point, any intervention by the new rabbi potentially creates a triangulated situation for the member/family in which personal/pastoral needs that ought to get priority can become tangled in perceived issues of "rabbinic politics." Such perceptions are damaging to both rabbis, affect the congregational system in a negative way, and can intrude on sensitive moments when the concerns and needs of the congregant/family ought to receive priority. It is the prior rabbi's obligation to support the development of pastoral relationships with the new rabbi.

If a new rabbi has to object to an arrangement for which she or he was not consulted, the impression conveyed can be one of insecurity or competition with the prior rabbi, a perception that does not serve the rabbi-congregation relationship that is being built. The prior rabbi should be especially sensitive to not placing the new rabbi in such a situation, and should not agree to or make commitments with former congregants without first

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directing those congregants to discuss the situation/event with the new rabbi. The prior rabbi may be in an advantageous position to explain to the congregant(s) the range of issues included in the concept of *k'vod harav* with respect to the new rabbi.

Example: "Rabbi Ploni/t as the rabbi of the congregation usually conducts the funerals for immediate family members of congregants. When families request that I do the service, our usual practice is to share the leading of the funeral and/or burial service, and together we work out who does what. Was there something in particular you had in mind of which we should be aware in terms of supporting your family at this time?"
(This is a both/and approach rather than an either/or.)

IV. Foundations for Creating a Systemic Approach

- Acknowledge that for congregants/congregant households that encounter a life-cycle event, the familiarity of the former rabbi may seem like a natural choice, with no disrespect intended for the new rabbi; but also that each member of the congregation is part of the community (system) and thus a partner in the congregational goal of cultivating a relationship with the new rabbi.
- Communicate that the new rabbi wants to develop relationships with congregants, and provide appropriate pastoral and other rabbinic support. As the rabbi of the congregation, she or he should be informed first of any life-cycle events and/or related pastoral concerns.
- Clarify how and to whom requests for officiation/participation by the former rabbi should be made. An optimal sequence is for a member or family to contact the new rabbi who, it is hoped, has worked out an arrangement with the prior rabbi for communicating information about life-cycle transitions. The new rabbi can then discuss with the prior rabbi any requests for participation, and the two rabbis ought to work out an arrangement that is mutually agreeable.

Where there is a difference of opinion, the rabbis ought to be governed by their collegiality, with the prior rabbi deferring to the new rabbi so as to support her/him and demonstrate *k'vod ha-rav*. The new rabbi, for her or his part, ought to balance the goal of growing into relationship with the community with the needs of the family and the *kavod* due to the prior rabbi. It is important that the prior

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rabbi support the new rabbi in responding to any objections from the member/family once the rabbis have agreed on “who will do what.”

V. Life-Cycle Within a Communal Setting (examples: Bar or Bat Mitzva, Aufruf, Baby-Namings)

Life-cycle events that are celebrated or observed within a communal setting are presumed to be under the *reshut* of the new rabbi unless she or he delegates to the prior rabbi, such as might occur if, for example, a Bar Mitzva is scheduled when the new rabbi is away. Since these types of events take place within the context of a congregational service, any role for the prior rabbi should be minimal, although a minimal role can still be significant.

Most life-cycle events within a communal setting involve liturgical and/or ritual roles and some component of personal address or remarks. A general guideline is that the new rabbi appropriately leads the liturgical/ritual pieces and usually speaks personally as well.

This is not to suggest that both rabbis should not speak – the prior rabbi may have a longer relationship on which to call that would inform her or his remarks in a personal way and add to what a new rabbi might be able to mention. It is appropriate that the new rabbi introduce and welcome the prior rabbi when she or he is present.

- A. Which rabbi speaks to a Bar or Bat Mitzva student is of significance, and there is no reason why both rabbis cannot do so. The new rabbi can recognize that for the Bat or Bar Mitzva (and her or his family) a long-standing prior relationship with the former rabbi can make that rabbi's remarks meaningful in a way that remarks by the new rabbi may not, simply because the new rabbi may be just getting to know the family. But the new rabbi can also speak, especially in terms of the connection of the student and the congregational community, and the new rabbi will be (one of) the student's rabbi(s) going forward.

- B. The celebration of an *aufruf*, if framed as the community's expression of blessings for the about-to-be-married/partnered couple, can be offered by the new rabbi within the service regardless of whether she or he is officiating, co-officiating with the prior rabbi, or not participating in the actual wedding. As a general guideline, the degree to which the prior rabbi participates in an *aufruf* can be inversely proportional to the degree to which she or he is participating in the

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wedding. As an example, if the prior rabbi is doing the wedding on her or his own, that rabbi need not participate in the *aufruf* as well. Conversely, if the new rabbi is doing the wedding, the prior rabbi may be asked to speak at the *aufruf*.

- C. Baby-naming taking place within a service would generally follow the same guidelines as suggested above for bar or bat mitzvah. Both rabbis should be aware that in some multi-generational congregation families the prior rabbi may know the grandparents best while the new rabbi may know the parents better.

VI. Life-Cycle events outside of the communal/congregational setting

“Outside’ here means “outside of the schedule of congregational services” not necessarily “outside of the building.” This delineation is based on whether the event is a *yachid*-event (personal or familial) or a *tzibbur*-event (communal or congregational).]

It is an appropriate *kavod* for a prior rabbi to be offered use of the sanctuary for certain life-cycle events where she or he may be officiating. Such events should be identified in and subject to an agreement made in advance with the lay leaders and the new rabbi. Some new rabbis will want to participate as well for some events being officiated by the prior rabbi in the synagogue, but this is not universal, and often unnecessary (see below, VI.B “Weddings”).

A. Funeral/Memorial Service/Shiva

Unlike life-cycle events of *simcha* (celebration), those of *tzarot* (distress) usually call for a fairly fast response from rabbis in terms of scheduling, role and rituals. These are also likely to be the events where the emotional states in a family are perhaps more fragile, and rabbis should share the goal of not imposing their professional/collegial concerns on a family trying to deal with a loss.

For these reasons, refer back to sections III and IV above as to why having a system in place *lehatchila* where by the new rabbi gets the first call helps to avoid the inevitable problems that can arise when that does not occur. Sometimes, due to the absence of a system, breakdown of communications, or not being able to reach the new rabbi under pressure of setting time for a funeral, the new rabbi faces decisions already made (*b'diavad*). These can range from “the prior rabbi is doing the funeral, thanks, no need for you...” to “we already made arrangements with the prior rabbi, after all, he knew Ploni so well....maybe you could read a psalm or something” or similar scenarios.

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As general guidance, it is suggested that whatever needs to be worked out be premised on serving the needs of the family that has experienced the loss. This need not mean agreeing to all demands or requests, but it does suggest that a new rabbi ought to exercise leverage carefully while keeping the family's needs at center. Reciprocally, it means the prior rabbi should proceed cautiously if she or he or the family has not yet reached the new rabbi, and minimally should inform the family that when the new rabbi is reached it is understood that she or he will also participate in the service, with details to be worked out.

If a *machlokhet* between the rabbis emerges, the rabbis should attempt to resolve it without involving the congregant or congregant family. The new rabbi should make decisions with regard to issues of disagreement. The rabbis can and should have an open and respectful discussion subsequently to identify where things could have been done differently to avoid the problem, and to agree upon ways to avoid future such problems.

When there is a chapel service and separate burial, a convenient division that sometimes works is for one rabbi to be the primary officiant at the chapel and the other rabbi at the graveside, but this is a not a universal model, as circumstances vary.

The question of the *hesped* (eulogy) is often more contentious than who leads the brief funeral liturgy. The governing principles here are *m'nachem avel* and *k'vod ha-met*, (see *A Guide Jewish Practice: The Journey of Mourning*) and it may make sense for the prior rabbi to offer the primary *hesped* if she or he knew the deceased much better.

When a funeral takes place in the synagogue the default position should be that if there is no schedule conflict, the new rabbi presides, especially at the opening and closing of the service, even if she or he is not offering the primary *hesped* or going to the cemetery. The new rabbi's place in the sanctuary has symbolic value and provides a pastoral presence.

Assuming a family observes more than one day/night of *shiva*, requests for "the rabbi" to lead the service can be shared by both rabbis. If there is only one opportunity for *t'fila* (it happens...) the new rabbi ought to have priority in leading as the *shiva minyan* falls more closely on the *tzibbur* end of the spectrum.

B. Weddings/Commitment Ceremonies

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Weddings and commitment ceremonies often involve adult children of congregational members. Where one or both partners has grown up in the congregation, even if she or he no longer lives nearby or is an independent adult member, “getting married in my synagogue” and/or “by my rabbi” [here, likely the prior rabbi] are often concerns that rabbis will want to honor.

As has been stated in each section of this document, where all such calls can go to the new rabbi first, or be routed to the new rabbi by the prior rabbi, or otherwise be re-directed to the new rabbi (such as by the congregation’s president), potential problems can be avoided.

When a wedding takes place in the synagogue, a plausible position could be to invite the new rabbi to welcome people, and offer the introduction and perhaps other parts of the wedding liturgy, if the new rabbi has some relationship to the couple and/or the parent(s) of the couple. But a new rabbi ought to be cautious about claiming a place in a ceremony where there may be no family connections and her or his presence/role may seem intrusive or distracting or not meaningful for the couple.

It is not unusual for a prior rabbi to be asked to officiate outside of the synagogue for an adult who may have grown up in the congregation, is not a current member, but whose parent/s and/or other relatives may be current members. The prior rabbi should call the new rabbi to let her or him know of the upcoming *simcha* so she or he can offer the appropriate congratulations. It also gives the new rabbi an opportunity to invite the couple for an *aufruf*.

VII. Fees and Honoraria

The customary professional standard is that rabbis do not accept fees or honoraria for officiating at life-cycle events of congregants. A prior rabbi officiating at, say, the wedding of an adult who grew up in the congregation may or may not charge a fee depending on personal practice. If both rabbis share the officiating of, for example, a funeral, the family may want to offer an honorarium to each. The current (new) rabbi would presumably decline or suggest a contribution, perhaps to the rabbi’s discretionary fund. The prior rabbi could choose to accept, or could suggest a donation (not necessarily to the discretionary fund, although that would be a valuable symbolic statement of rabbinic solidarity and mutual respect).

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There are legitimate *parnassa* needs of a prior rabbi, but the values of effective succession and stability in the congregational system and of rabbinic collegiality need to take precedence. Prior rabbis ought not to use the opportunity of invitations to officiate at life-cycle events of former congregants as a way to supplement income.

VIII. DISCRETIONARY FUND

When the outgoing rabbi a) is named "emeritus" by the congregation and accepts same, meaning there remains some formal if inactive and mostly honorific (but real) relationship between that rabbi and the congregation and b) that rabbi wants to maintain an on-going discretionary fund which presumably gets on-going income from one of two customary sources: a direct annual allocation from the congregation and/or individual contributions, as long as the fund is managed by the same processes as any other discretionary fund (including that of the new rabbi) and remains a fund of the congregation, it seems a fund *could* continue to operate with disbursements by the emeritus rabbi (although appropriate experts in legal and financial matters ought to be consulted).

But this begs the question of "should" the emeritus continue to operate such a fund?

The concerns here include: 1) people going to one rabbi with a request, being turned down, and going to the other rabbi hoping for a "yes." This could create conflict between the rabbis and create confusion for congregants (and others) about "who to ask"; 2) Should the new rabbi be asked if she or he wants the emeritus to have a continuing discretionary fund? 3) Who owns the decision? Should this be decided between the two rabbis or between the board and the about-to-be-emeritus before the new rabbi arrives?

All things being equal, a reasonable practice is for the outgoing (emeritus) rabbi *not* to continue to maintain a discretionary fund for all of the reasons mentioned above. Plus this one: the main task of the first year of a new rabbi-congregation relationship is the relationship: building it, guarding it, strengthening it. A key job of an emeritus is to do everything he or she can to help the new rabbi be recognized as the rabbi of the congregation. Continuing to operate a discretionary can create some of the same problems as continuing to officiate at life-cycle events or holding a separate shabat service in the chapel while the new rabbi officiates in the sanctuary. It sends an odd message to the congregation.

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Rabbis of long tenure as well as their congregations sometimes have trouble "letting go" One job of lay leaders is to gently but firmly explain where possible and enforce where necessary boundaries on the emeritus for the health of the congregation and in support of the new rabbi. Done in advance of the new rabbi's arrival will likely be easier than always after the fact or in the wake of a controversy. The honor and appreciation due to the emeritus should not displace the systemic priority of building the new rabbi-congregation relationship.

Assuming the outgoing (emeritus) rabbi will not continue to operate an on-going discretionary fund, what should be done with the remaining funds in such a fund?

- a. the departing rabbi *can* disburse any or even all the money in the discretionary fund in accordance with guidelines for such funds (down to any minimum balance as required by a bank to keep the fund active/open); after all, people donated to the fund for this specific rabbi to exercise "discretion."
- b. the departing rabbi *does* disburse some funds, often to charitable organizations, *but leaves some reasonable balance* for the new incoming rabbi, who may get a request for assistance before having a chance to build up the fund.
- c. the departing rabbi disburses funds up to the time she or he leaves but only in response to requests, and turns over the remaining balance to the new rabbi.
- d. If there is no new rabbi coming in, there can be confusion as to who controls the fund and the funds. It is advisable either to: have the outgoing rabbi transfer the remaining funds in a discretionary fund to the congregation (down to any minimum balance as required by a bank to keep the fund active/open), either as a direct donation or to hold in escrow pending the time when a new rabbi will arrive; or, simply leave the balance in the discretionary fund account which, as best practice, should always have two signatories although only one signature (that of the rabbi) would normally be needed for disbursement in the interest of confidentiality. If/when a new rabbi arrives, the congregation should transfer those funds back into the new rabbi's discretionary fund.

In the first option the funds are under the control of multiple leaders on the board, whereas in the second option only one person has access to and control of a fund balance which can invite concerns. A disadvantage of the first option is it requires some transactions and tracking, and potentially could involve accidental use of restricted funds for operating expenses. Congregational leaders should check as to whether a

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discretionary fund is a (permanently/temporarily) "restricted fund" as certain IRS and other regulations may apply and affect whether such funds can in fact be transferred.

IX. Resolution of Conflicts

It is hoped that following the practices suggested here will minimize the number of conflicts that arise between a new and a prior rabbi. Where conflicts arise, both rabbis should strive to resolve them without having to engage the individual or family that may be involved, or the synagogue leadership. The perception of the rabbinate, and the collegiality and *kavod* that rabbis ought to model, is often contingent on both rabbis finding a way to mediate tensions and resolve problems.

As a general guideline, the new rabbi is “the rabbi” of the congregation and ought to be supported by the leaders, staff and the prior rabbi in growing into that role. It is true that some congregants tend to personalize relationships with rabbis: “You will always be my rabbi...” Nonetheless, the prior rabbi’s obligation is to support the new rabbi.

Conversely, the new rabbi’s integration into the congregation can be eased at times by finding ways to accommodate requests for a prior rabbi to participate rather than by attempts to block involvement. Experience suggests that over time, the “new rabbi” becomes “the rabbi” and while there may always be circumstances or events where prior long-standing relationships suggest “the prior rabbi” officiates, such requests generally diminish over time.

Mediation, consultation and other interventions may be requested from the RRA when needed. Any RRA member has recourse to the RRA Ethics Code and procedures if she or he feels that a colleague had acted in a way as to breach the standards established by the Association. It is hoped that conflicts can be resolved in ways that avoid such recourse.

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