



# Checklist & Questions for Camp Leadership Transitions

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Leadership transitions can be challenging to navigate - and can cause information gaps and loss of institutional memory. Planning ahead can make that easier by providing a smooth transfer of information in a methodical way in key organizational areas.

This guide is for creating smooth leadership transitions for year-round professional staff at Jewish summer camps. It can be used to get a successor up to speed as quickly as possible and also used as a template for post-summer reporting to boards or parent organizations. This resource is not meant to be a full accounting, nor is it meant to be a line-by-line guide. Not every line will need to be filled out, and we recommend listing the best person to reach out to about certain topics. The first sections are focused on the *Tachlis* (practical, specific knowledge), and the second half is of a big picture view on relationships, motivations, challenges and opportunities of the organization.

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***Have additions or feedback? We'd love to hear from you.***

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## GENERAL

- Where are the important logins & passwords stored?
- What is the organization chart/structure?
- Where are the most recent performance reviews for the year-round team kept?
  - Strengths and Weaknesses of year round employees (Best not in writing)
- ACA and CCA Accreditation and major upcoming dates
- Where are the results from the two most recent CSI and SSI Surveys?
- Current Strategic Plan (if applicable)
- What are the most important things to do within one month of the successor's start date?
- What systems would you keep/change?
- A helpful tool to create is a calendar/checklist of major milestones, purchases, or decisions that need to be made, and when they need to happen.
  - Consider including "do" dates and "due" dates.

Create a chart like this for your successor:

### WHO TO TALK TO

Contact Name	Contact Info	Demographic (Parent, Staff, Alumni, Donor, Community Leader, etc)	Urgency of contact (first 30 days, a few months in, etc)	Important info
Adam Sandler	operaman@camp.org	Former Director	First 30 days	



## RELATIONSHIPS & STAKEHOLDERS -

Who are the key contacts? Are any of them camp alum or parents?

- Local Community
  - Federation
  - Day Schools
  - High Schools
  - Synagogues
  - One Happy Camper
  - PJ Library
  
- National Community
  - Camp Movement
  - Foundation for Jewish Camp
  - JCamp 180

## FINANCE, BUDGET, AND BUSINESS OPS:

*Who is the person with the most knowledge of this area? Is there someone who might have a strongly differing view to consider? (Can be professional, lay leader, volunteer, seasonal staff, or yourself)*

- Current Operating Budget
- Accountant/Auditor Info
- How are finances communicated to the board?
- Insurance policy contacts:
- Permits and Licenses for operation (state and local, dept of health, etc. timelines for paperwork or visits)
- Legal contacts

## BOARD/COMMITTEE WORK

- Short term Goals
- Long term Goals
- Executive Committee Members:
- Current Chair:
- Future Chair:
- Key things to know:
- Current Committees:
- Parent organization's board: who are the key figures?

*Who is the person with the most knowledge of this area? (Can be professional, lay leader, volunteer, seasonal staff, or yourself)*



## STAFF - YEAR ROUND & SUMMER

### Summer

- Calendar of recruitment
- Staff recruit strategies
  - Connections with local colleges or fraternities/sororities
  - Israeli *shlichim*
  - J1 Visa Contact?
  - Staffing agencies utilized? (international and local)
- Interview processes
  - What should a new person know about certain roles, people, or historic arrangements?
  - What is the summer interview / hiring process (where is this documented? Who owns this process?)
- Summer Staff Culture
  - Who are the seasonal culture carriers?
  - Training
    - who are the partners or outside facilitators
    - Any opportunity for pre-summer, year-round learning
    - Fellowships (Cornerstone, Weinstein, etc.)
    - Copies of previous staff orientation schedules
  - What are evaluation processes and what is the culture of feedback? How is feedback given and received and documented?

### Year Round

- What is the team dynamic?
- What is the organization chart/structure?
- What's the culture of the place? What are the do's and don'ts?
- Where are the most recent performance reviews kept? What is the timeline and procedure for performance reflections? How is feedback given and received and documented?
- What are the strengths and areas for growth of this team?
- Where is camp's policies around psychological safety, safety respect equity, diversity equity and inclusion, etc.
- Interview processes
  - What should a new person know about certain roles, people, or historic arrangements?
  - What mechanisms exist to ensure equitable and open search processes
  - What governance structures are in place to ensure appropriate hiring practices?



- What role do board members / lay leaders / seasonal staff have in contributing to year-round professional team hiring?

## LOCAL COMMUNITY

*Who is the person with the most knowledge of this area? Is there someone who might have a strongly differing view to consider? (Can be professional, lay leader, volunteer, seasonal staff, or yourself)*

ACA requires annual contact with your local emergency departments - so any information shared here is both a benefit and will make your life easier come summertime.

- Police Dept
- Fire Dept
- Elected officials: City council, regional government, etc. Any background info that should be known here on any?
- Neighbors to camp (who and contact info)
- Local summer camp directors (who they are, contact info, history of relationship - friendly or otherwise)
- Local or Regional Jewish Family Services or similar mental health and crisis support organizations

## FUNDRAISING & GRANTS

*Who is the person with the most knowledge of this area? Is there someone who might have a strongly differing view to consider? (Can be professional, lay leader, volunteer, seasonal staff, or yourself)*

- Who are your top 25 donors and what information should your successor know about them/their relationship with camp?
- Current Grants (in progress):
- Current Grant agency contact:
- Current internal team contact:
- Links to previous grant materials (grant letter, payment schedule, reporting, calendar of activities)
- Future Grants to apply for:
- Fundraising materials/collateral (and who is in charge):
- Legacy/Endowment Campaign
  - Stewardship Plans for Legacy Society Members (and where to find them)
- Fundraising Committee Members:



- Regional group fundraising events (ex: Federation organized, such as Tour de Summer Camps in LA/NJ)
- Current Giving Societies:
- What alumni organizations or leadership currently exist?
- How do alumni events get organized/created (is this a board committee?)
- Are there major areas of improvement/change needed?

EXAMPLE:

Recent, Current, and Future Fundraising Campaigns

Project	Campaign, Grant, something else?	Goal	Key Reporting Milestones & Dates	Due Date	Status
2024 Annual Campaign					
Dining Hall Capital Campaign					
Yedid Nefesh Grant (FJC)					
Day Camp Grant (JCamp180)					



## FACILITIES

*Who is the person with the most knowledge of this area? Is there someone who might have a strongly differing view to consider? (Can be professional, lay leader, volunteer, seasonal staff, or yourself)*

- Important Documents (and where stored):
- Emerging Issues:
- Long Term Issues:

What does your successor need to know (if at all) about:

- Sound systems
- Electricity info
- Pool services
- Plumbers
- Septic system
- Contractors
- Water shut off
- Electrical shut off
- Phone systems/locations
- Internet contacts/ IT Service Provider

Who oversees emergency items (storage, expiration, purchasing, etc):

- Fire extinguishers and hydrants
- Automated External Defibrillators (AEDs)
- Security
- Walkie Talkie info
  - Frequency list
  - Vendor info
  - Hidden channel info



## HEALTH & WELLNESS

*Who is the person with the most knowledge of this area? Is there someone who might have a strongly differing view to consider? (Can be professional, lay leader, volunteer, seasonal staff, or yourself)*

- Key seasonal Health Center contacts:
- Key mental health, disabilities inclusion, or other community care contacts:
- Key vendors:
- Opening & Closing day need-to-know:
- Health Inspection (how it works, when, and key contact):
- Are there major areas of improvement/change needed?

## TRANSPORTATION

*Who is the person with the most knowledge of this area? (Can be professional, lay leader, volunteer, seasonal staff, or yourself)*

- A short description: how it all happens.
- Key timelines for organizing:
- Bus company:
- Airline contacts:
- Luggage shipping contacts:
- Summer vehicles & insurance:
- Transportation Site/Location Contact:
- Are there major areas of improvement/change needed?

## ENROLLMENT

*Who is the person with the most knowledge of this area? Is there someone who might have a strongly differing view to consider? (Can be professional, lay leader, volunteer, seasonal staff, or yourself)*

- Calendar of events:
- Historic trends:
- Partner organizations for recruitment:
- Steps to open enrollment:
- Tuition increase trends:
- Who owns / leads recruitment:
- Parent/Family recruitment influencers to connect with:
- Growing Markets / Areas of Opportunity:
- Marketing Collateral (brochures, websites, swag, and how it all gets updated)





## CAMP CULTURE

- Camper areas of strength:
- Staff areas of strength:
- Areas for growth/change:
- What are the camp sacrosanct traditions?
- What traditions could end?

## CAMP PROGRAM

*Who is the person with the most knowledge of this area? Is there someone who might have a strongly differing view to consider? (Can be professional, lay leader, volunteer, seasonal staff, or yourself)*

- (All the program areas): Who are the key contacts?
- How does scheduling work for elective blocks?
- Where are supplies kept? Where is inventory logged?
- Contacts for licensure & certifications: archery, WSI, ropes, wilderness first responders, etc
- Vendors/Outside Talent/Educational Resource Providers/Artist in Residence (regular schedules, contact info, etc)
- Are there major areas of improvement/change needed?

## FEES & SCHOLARSHIPS

*Who is the person with the most knowledge of this area? Is there someone who might have a strongly differing view to consider? (Can be professional, lay leader, volunteer, seasonal staff, or yourself)*

- Historic info about scholarship need info (certain communities or demographics)
- How does the scholarship process work?
- Is there a scholarship committee?
- Historic scholarship offerings available (certain community organizations, grants, funds)



## JEWISH LIFE/EDUCATION

*Who is the person with the most knowledge of this area? Is there someone who might have a strongly differing view to consider? (Can be professional, lay leader, volunteer, seasonal staff, or yourself)*

- Relationships with clergy and educators
- Curriculum development
- What are the Shabbat sacrosanct traditions?
- (where relevant) Who is responsible for decisions around Jewish law and its application to camp? Are there set guidelines?
- What are the camps core educational values and red lines (especially in regards to Israel)?
  - Are there nuances within specific camp communities to be aware of?
- Are there major areas of improvement/change needed?

## KITCHEN/FOOD

*Who is the person with the most knowledge of this area? Is there someone who might have a strongly differing view to consider? (Can be professional, lay leader, volunteer, seasonal staff, or yourself)*

- Food Vendors
- Nutritional consultant
- Kosher Meat (if applicable) vendor
- Things to know about kitchen facilities
- Allergy consultant/ special diets
- Special diet policies
- Mashgiach info (or local kashrut body)
- Are there major areas of improvement/change needed?



## CAMP COMMUNICATIONS

*Who is the person with the most knowledge of this area? Is there someone who might have a strongly differing view to consider? (Can be professional, lay leader, volunteer, seasonal staff, or yourself)*

- Who currently has access to or controls the website, social media, mass email systems?
- What is the process for pushing out a mass email, a website update, or social media post?
- Who are the target stakeholders for each unique communication channel?
- Is there one vision or mission used across channels?
- What systems are in place for unplanned communications? (crisis, condolence announcement, response to world events)
- How do practices shift over the summer vs during the year?
- Is there a defined style guide for fonts, colors, logos, “who are we” statements, etc?
  - Are there any written or unwritten rules around communications? (Ex: only X type of emails or Y announcements get pushed out to the full list)
- What should someone know about existing systems or practices?

## ALUMNI

*Who is the person with the most knowledge of this area? Is there someone who might have a strongly differing view to consider? (Can be professional, lay leader, volunteer, seasonal staff, or yourself)*

- What alumni engagement efforts exist?
- Who are key alumni in planning & implementation of events?
- Is there an alumni board or organization?



## KEY UNDERSTANDINGS: CULTURE AND RELATIONSHIPS

The questions below are helpful to answer verbally for a successor that can help gain understanding:

- Who has power / influence, and what do they want?
- What are the biggest differences in perspectives within/between the board, staff, and major influencers?
- What's the relationship like with the biggest donors and feeder institutions?
- What's the Board Chair and other Board leaders like? What do they value? What motivates them? What gets them upset?
- What's the culture of the place? What are the do's and don'ts (written and, especially, unwritten)?
- Same set of questions with senior staff

Camp Function:

- What's really great here?
- What's not working/
- What are the greatest opportunities for show and long-term improvement?
- What are priorities to address?
- What's blocking them? Why haven't they been addressed to date?
- Where can I be most helpful?

Other resources:

- Minutes from previous board meetings
- Conversations with current and past board chairs

### **BONUS: Retreat/Rental Business**

Re-read the above sections, and see which questions, bullets, or knowledge pieces apply to this section and note them here.

### **BONUS: Teen Travel Programs (including Israel)**

Re-read the above sections, and see which questions, bullets, or knowledge pieces apply to this section and note them here.