

**A GUIDE
FOR
THE NEW
JCC
EXECUTIVE**

Co-edited by
William Grossman and
Zev Hymowitz



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ADDENDUM

We acknowledge with thanks the efforts of Steven J. Rod, Director, Executive Development Projects for reviewing the articles in this Guide and making a number of suggestions and editorial revisions.

William Grossman
and
Zev Hymowitz
Co-Editors

Dear Executive:

Welcome to your new position! We want to wish you every success as you embark on this most exciting and critical role in Jewish communal life, as Executive Director of a Jewish Community Center.

As part of the JCC Association's ongoing commitment to the training and development of JCC executives, you will find these articles, written by your colleagues, to be practical aids as you begin your work.

They cover selected issues that face an executive in his/her day-to-day, week-to-week, and month-to-month activity.

While it is impossible to cover every eventuality, we have featured those most often cited by executives as essential building blocks to succeeding. The material is placed in a logical sequence as follows:

- * Our Jewish Renaissance: Reflection and Renewal
- * Getting Started
- * Role of the Executive: The Leadership Responsibility
- * President/Executive Director Partnership
 - * Tasks of an Executive
 - * Goal-Setting Process
 - * Relating to Power People
 - * Leadership Development
 - * Staff Recruitment, Retention and Development-Strategic Tools
 - * Agenda Building
- How Do I Know When I Need Help?
- Where Do I Go When I Need Help?
- * Relationships with the Jewish Federation and United Way
- * Revenue Enhancement: Role of Executive and Board

Once again,

Your comments are most welcome.

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Our Jewish Renaissance: Reflections and Renewal

David Dubin

Executive Director

Jewish Community Center on the Palisades, Tenafly, New Jersey

While we struggle with definitions as to who we are-Jewish Center professionals, Jewish communal professionals, social workers, educators, and so forth, one constant remains: That our primary purpose and indivisible commitment are to exercise whatever skills we possess, in whatever form our individuality determines, to help people feel greater confidence and joy as Jews with programs that illuminate learning, teach the beauty and balance of our values, savor the sanctity and sweetness of our Sabbath, invite the exhilarating celebration of our customs, and perhaps, most of all, communicate a faith that life has more meaning with every incremental act of Jewish living.

Turf

I believe in the concept of linkages, consortiums and all the other fancy descriptions for involving others, broadening our base and diminishing conflict. I also believe we should concern ourselves less with the matter of auspices and credit and more with the matter of content and delivery. When a Jewish educational need is identified, our Centers should attempt to facilitate a response to that need, utilizing good community process *even if* it means that others ultimately deliver the service. If our purposes are altruistic, they *then* will have been achieved.

Our Trademark

There are three areas of Jewish education in which I firmly believe the Center is unrivaled in effectiveness of method and mentality. I have identified them, elsewhere as ethnic counseling, experiential education, and interventive education.

Ethnic counseling involves the use of creative consciousness-raising exercises, such as role playing, free associative questions and prioritization techniques, and so forth, wherein participants are helped to explore themselves as Jews, to sort out their conflicts and to evolve a positive philosophy as Jews.

Experiential activity focuses on the affective as much or more than on the cognitive in which learning comes from living and knowledge is caught as well as taught. It includes such programs as Shabbat and holiday workshops, retreats, chavurahgroups, a Chassidic wedding at camp, and the like.

Interventive education is the artful activity of sensitive professionals who

know how to seize a "teachable moment" to stimulate discussion and reflection.

We still cherish the small group as the major program unit in the Center and many staff have skills in utilizing that unity as a medium of positive influence. Ethnic counseling or ethnotherapy lends itself to group work skills. Experiential Jewish activity lends itself to program skills. Interventive education lends itself to social work, education, or counseling skills where antennae are tuned in for signals.

I am convinced that in our Centers, we can engage in "learning" as well as "education." Talmud, commentaries and Jewish texts, when taught creatively and sensitively, are rich and meaningful sources of Jewish education and study for our Centers. Without doubt, one does not require Yeshiva education to engage in Talmudic study I will never forget participating with a group of attorneys, who had no formal Jewish education, in a semi-monthly Talmudic discussion on the Tractate Baba Metziah and its dialectic content concerning religious and civil law.

I have seen lay leadership exult in discussion on Jewish values and philosophy utilizing concepts from the bible, Maimonides, rabbinic dialogue in the oral Torah, and other commentaries. I have seen staff members discuss scholarship policies based on reactions to interpretation of charity and I have witnessed discussion on other Jewish values, of community, family, sanctity, and so on, in relation to contemporary Jewish issues.

The Why Me Syndrome

The point is obvious but needs to be reinforced. If we mean what we say about our Jewish commitment and mission, should the contribution of Jewish content be any less of a significant criterion of job performance than organization skills, program skills or even relationship skills. If it is noted explicitly as a job expectation in the hiring process, a procedure which I would like to believe has become standard by now, is it not logical and fair to include it in the evaluation as well, a process designed to measure job expectations?

Perhaps the most effective means of forewarning staff that Jewish program skills are an integral component of evaluation is by insuring that this item is part of the supervisory agendaes worker and supervisor work together supportively to build a program.

The Depth Crisis

It has often been said by our teachers and role models that lifting of standards of Jewish content in Jewish community centers is, in large measure, dependent upon the strengthening of the Jewish identity and motivation of Center staff,

Getting Started: Beginning as an Executive

*Allan Finkelstein
Executive Vice President
JCC Association of Los Angeles, California*

A look at your first days on *the* job as a new executive—what you will feel/and experience, as well as things to remember.

You have just reached a major culmination point in your career in the JCC field—your appointment as Executive Director of a JCC. Whether you have been in the field for five or fifteen years, this is a major step. In addition to the joy and satisfaction of having been given this responsibility and knowing that a search committee has faith in your ability to lead the agency, many other things will happen, some of which you will not anticipate.

You have, hopefully, been fortunate enough to have been trained by a group of supervisors as you have moved up through the ranks. Supervision, regardless of its level of intensity or effectiveness, provides some things that will no longer be available to you—ongoing and daily support, somewhere else to turn for a final decision, someone else who sets the style and pace of the agency. Yes, it can be lonely at the top. It becomes your responsibility to develop the support network to which you can turn. There are JCC Association Community Consultants, colleagues around North America at other JCCs, lay people who have expertise in areas of concern, and valuable resources at other communal agencies in your community. This is a critical network to develop early in your tenure.

The most seasoned executives call upon each other regularly for feedback, support and that objective point of view which can be so important.

What is really different about being an executive is that attention is focused on you as the visionary, the leader and the pacesetter. Develop a philosophy and a related action plan which can be explained and translated to others. In order to evolve this philosophy and articulate a vision, certain questions must first be answered:

- o How do you want to be perceived?
- o What impact do you want to make in six months or in a year?

- Who are the people necessary to see, to "bring on board," in order for you to be able to develop the vision?
- What do you need to learn in order to achieve your goals? What will your learning curve be?

What do you need from past leaders, executives, etc., in addition to *those* currently involved?

This plan, which articulates your vision for the agency and your "map" to get there, becomes *the* basis for everything that you do *as* you begin. Without *it*, you may likely *waste a great deal of time*. More important, the vision must be *shared* and "owned" by your key staff and lay leaders. Take *the time to get their* input *in* developing *the* plan, *and* be certain to *share* it with *as wide a group as is* necessary.

Your ability and effectiveness *will* be measured, *in* large part, by the way *in* which you involve *others in* the development of your vision, *and* how effective *you are in* reaching the goals *that you have* set out for yourself. Your style *is set in* these *early* months.

Be conscious and planful in approaching your work, and be certain to share with others on a regular basis, both for information and for feedback. The paybacks will be significant in the coming years as you come back to these people for a number of things.

A major challenge during your first months on the job will be deciding who to see and who needs to know "who you are." While each community is different, certain "players" are common and should be included in your first contacts. These include, but are not limited to: key past JCC presidents; major Federation leaders; executives of Federation and United Way; and, of course, current officers of your agency. Each of these people will be of assistance in identifying others who should be included among your visits.

Action Points

- * *Have you identified your support network, e.g. JCC Association community consultant, colleagues and lay people? Have you used it?*
- * *Are you devoting time to building relationships with lay leaders and staff? Do it now.*

Role of the Executive: The Leadership Responsibility

*Jerry Wische
Executive Director
Jewish Community Center
Houston, Texas*

What is your role as executive, and what is the principal professional leadership role you play? Twenty-four critical points to remember.

There are several key functions that every Board expects from the Executive Director. These include:

1. To serve as Chief Operations Executive of the ,JCC.
2. To serve as professional advisor to the Board.
3. To recommend appropriate policies and practices for consideration.
4. To effectively implement all policies and practices adopted by the Board.
5. To inform the Board fully and accurately regarding the program, staff, fiscal operations, community issues, and unusual and special situations.
6. To plan and administer operating and capital budgets in conjunction with appropriate committees and to keep the Board up to date on budget problems.
7. To interpret the needs of the membership/community and to present professional recommendations for problem-solving to be considered by the Board.
8. To recruit and train personnel.
9. To assist the Board in meeting changing challenges affecting the Center, including long-range planning, future funding and changing community needs.
10. The executive must give leadership.
11. The executive is the key catalyst in the partnership between volunteer leadership (Board and committees) and the management (staff).

12. The executive must see that there is an effective staff management team with resources for success, as well as succession.
13. The executive must analyze and solve problems.
14. The executive must be committed to long-range planning and monitoring progress on an ongoing basis.
15. The executive must be able to clearly articulate the mission, goals and strategies adopted by the Board.
16. The executive must be the "bottom line" in fiscal matters.
17. The executive must be able to involve lay leaders in the budget process and share with them the tough decisions that are needed to manage the agency.
18. The executive must provide the Board with appropriate concise fiscal information that is timely. He or she must effectively monitor budget data and identify potential problems. He or she must be directly involved in guiding the chief financial staff person. He or she must create the conditions to protect "the bottom line."
19. The executive must ensure the development and implementation of appropriate maintenance of Center properties, and give direction and guidance regarding physical facilities.
20. The executive must maintain an active involvement with past presidents and emerging leaders.
21. The executive must be Jewishly knowledgeable.
22. The executive must be a Jewish role model.
23. The executive must have effective relations with Federation and United Way executives.
24. The executive must be visible at Jewish and general communal events.

Action Points

- *As executive, are you analyzing situations and helping to solve problems?*

Remember to review these critical points on a regular basis.

President/Executive Director Partnership

*Drew Staffenberg
Executive Director
Jewish Federation of Greater Vancouver
Vancouver, British Columbia*

A look at the changing role of the executive in partnership with the president.

The key to an effective Jewish Community Center operation depends on the partnership between the volunteer and professional Center leaders. The key to the success of these relationships is based on the pivotal relationship of the senior volunteer (president) and senior professional officer (executive Director) of the JCC.

The executive and president set a tone for the agency. They must have the same understanding of the mission, vision, and short-and long-term goals. The only way to achieve this sense of congruence is through open and constant communication.

The role of the executive has changed over the years and will continue to do so in the future. However, the executive's traditional roles as a "community builder" and of working through others will remain. The executive is seen as a chief operating officer, sometimes the chief executive officer. Whatever the particular role, the professional must be there to help the senior volunteer leader do an effective, satisfying job.

There are fundamental principles that characterize the relationship between the president and executive director. They include: accountability, interdependence, mutual support, respect and excellence in performance. There must be a recognition that both the president and the executive director bring a unique contribution to the partnership; communication is the key.

The partnership is based on mutual recognition and respect for each other. The executive must recognize that the president is a volunteer and, while committed to the Center, has other demands which also require his attention including family, business and other communal responsibilities. The president must recognize that the executive is a highly skilled professional committed to the agency, continuity of Jewish life and to the success of the president.

B'reshit (in the beginning)

The process of a new president and executive director working together will commence long before the official election and installation of the president.

- A. Get to know each other -professionally/personally
- B. Share your strengths and weaknesses
- C. Share your dreams and vision for the Center
- D. Assess the status of the Center vis-a-vis: board members, staff members, general community, Jewish community, funding agencies, and collegial agencies.
- E. Develop specific measurable goals-weekly, monthly, quarterly, yearly.

Mosaic Period (The president's term of office)

- A. Develop a mutually effective method of communication
 - 1. Update of agency issues-problems and successes
 - 2. Community news affecting JCC
 - 3. National/international news impacting the Center
 - 4. Life cycle happenings of Center members
 - 5. End conversation on positive note
- B. Set aside time each week review events of the previous week and plan for coming weeks.
 - 1. Review prior week against planned activity
 - 2. List "to do's" for coming week, prioritize, and bring forward items from previous list
 - 3. Plan agendas for future meetings, meeting notices, follow-ups
 - 4. Review budget matters/cash flow
 - 5. Develop strategic approach to keeping funding agencies informed and on-side
 - 6. Plan community meetings and events to enhance "public image"
 - 7. Target Executive Committee and Board members to interact with
 - 8. Review and evaluate long-term goals vs. current status
 - 9. Share current relevant literature on the not-for-profit industry with president (Provide executive summaries where necessary)
 - 10. Identify problems in advance to avoid surprises

- O. Annually review Center programs and activities with future directions in mind. The president and executive should also evaluate the board's performance.

Joshua period (passing on the vision-the mantle of leadership-moving

Six months prior to the end of the current president's term, begin the process of transition.

1. Begin meeting with the current president and president-elect. Invite president-elect to weekly meetings (or portion of.)
2. Develop one or more relationships with president-elect being sensitive to current president and his responsibility. Don't write off the latter.
3. Discuss role of current president for his continued involvement and counsel as a mentor following his term.

Action Points

- o Do you have a dream and vision for the Center? How is it being shared, and with whom?*
- Do you have a plan for a strong working relationship with your president?*

Tasks of an Executive

*Barton R. Schachter
Executive Vice President
Jewish Community Center
Pittsburgh, Pennsylvania*

Approaching the daily tasks associated with the job and the "knows" of being a JCC executive.

It is quite certain that, like the distinct differences in snow flakes, no two executives operate the same exact way. Each reaches his or her potential by doing what works best for him or her. One's style of being an executive may be dictated by the way one approaches the daily tasks associated with the job.

I like lists. I like to make short lists and long lists. The short list represents the tasks I have to do for the next several days and the long list is the list of tasks that extends into the future. My short list reminds me to make the timely telephone calls: call the president at least three times a week; call the treasurer weekly; call the UJF (Federation) executive regularly. Each week I direct my additional calls to lay leaders who are involved with an issue or item about which I am concerned. "I just want to talk with you for updating purposes." On the short list, I remind myself to walk the building and especially visit an important area each day. Notes, letters and general reminders are on my short list. Daily cash and monthly budget reports need ongoing scrutinizing with the controller and need to be shared with appropriate staff and lay leaders.

Communication involves tasks. Personal contacts with all levels of staff are essential to better understanding your agency and its issues. Calls to your individual board members and chief lay leaders are vital.

Your task is to see that you model communications well for your staff. Insist on regular staff meetings, individual conference time, and expectation and evaluation reports; develop agenda, challenge goals and objectives, and discuss training, budget and overall performance.

Stay aware and on top of the issues. No executive likes to be the last to know what's going on. Know your agency.

1. Know your building. Take a daily stroll; be a user of some of the programs; see it as a consumer; look up, look down, look all around.
2. Know your staff. Find opportunities to talk with them; take someone

to lunch or have a scheduled series of "Breakfast with Bob" *listen* to them; thank them, recognize them, reward them.

3. Know your board. Keep a constant flow of communication with your president, Treasurer and other chief lay leaders; talk to a past president, an honorary member; challenge your board; see that they do their jobs and are held accountable.
4. Know your finances. Review your daily cash reports, your monthly budget, investments and other appropriate financial documents. Keep your staff and lay leadership well informed; review, reflect and squeeze the numbers regularly, always asking "if budget and goals and objectives are in order."
5. Know your program. Program is the means to the desired end. Understand it, guide it. Talk to staff, clients and lay leaders about their reactions. Read other Center material, newspapers, magazines. Be involved in setting goals and expectations: this is your product, and you should use all of your resources to better develop the program. Talk to your program people daily; channel their ideas and thoughts. Help agenda development, set standards for meetings, attendance and general monitoring of the system.
6. Know how to delegate. It's a most important method of achieving the proper ends. Don't dump the work, but in a systematic manner see that as much as possible is properly channeled. Tickle your work; follow up and make those who work for you accountable to you for their responsibilities.
7. Know ^U "To your own self be true." Not only is that poetic but it's practical. Ask yourself questions constantly. Know your limits. Be involved, but know when it's better to allow others to carry out the tasks. Stay close, but give enough room to allow someone else to test his/her skills.
8. Communicate clearly and regularly with staff and lay leaders. It will enable others to perform at more efficient levels. Listen, dialogue and react - see the situation from all views. *Make sure that your thoughts* are clearly known by all staff. Be sensitive to good timing. Be tactful, regular and dependable.

Make your own job worth getting up for each day. Take a risk, challenge yourself, show some insight and compassion; be supportive, say something *nice*, and tell yourself each day how lucky you are for having what you have.

The KNOWS of Being a JCC Executive:

- Know your building - "take a stroll"
- ® Know your staff - "say hello"
- ® Know your board - "what's new"
- Know your finances - "two plus two better be foul"
- ® Know your program - "quality and quantity"
- ® Know yourself -- "be true to yourself"
- Know your communications - "look, listen and be informative"

Action Points

The KNOWS of Being a JCC Executive:

- Know your building - "take a stroll"
- ® Know your staff - "say hello"
- ® Know your board - "what's new"
- ® Know your finances - "two plus two better be four"
- ® Know your program - "quality and quantity"
- ® Know yourself - "be true to yourself"
- Know your communications - "look, listen and be informative"

Goal-Setting Process

Jeffrey L. Reuss
Executive Director
JCC of Greater Baltimore, Maryland

How do you really set goals? Who should be involved?

Short-term goals are the important goals. The long-term goals of most executives sound *more* similar than different -- fiscal responsibility, program creativity, becoming the agency by which all other agencies are judged. Its hard to disagree with these "apple pie and motherhood" goals, yet even harder to use them in your work. *Short-term goals will take into account those which you agreed to meet in accepting the new job* *undbhmsewhichyuyhaweamre/ta/nad are needed after meeting with staff and lay leaders.*

Goals are time limited. Your first set of goals are just that --first steps! They should be achievable within three, six and nine months. If longer, they become visionary, and you are liable to be faulted for not, to invert an adage, seeing the "trees for the forest." Finally, as success breeds more success, choose your goals with "doability" in mind.

With whom do you share your plans? Your president needs hear a full analysis on everything you intend to do and how you intend to do it. Even if, in your assessment, the president is part of the problem and not part of the solution, he/she must agree to the salient elements of your strategy.

im-
plementer.

Management isn't just a set of cliches, but it may be a set of truisms. It's "lonely at the top" *because* the decisions you make affect people's lives and the life of the institution. Usually, those decisions are considered, but occasionally they are intuitive. In any event, any action you take, either purposeful or not intentional, affects much more than the issue at *hand. It* sets precedents, establishes new norms or defines new directions. Caution and discretion are advised, but don't cross the line to secrecy. That's why I encourage you to share as much with your president as he/she is willing and able to hear.

The cumulative effect of accomplishing short-term goals is more personal than achieving a vision; it creates a career. Substantive short-term goals create benchmarks for evaluation and a sequence for actioi:. If well-established and communicated, these goals are usually achievable. Every twelve months, at the start of a new fiscal year, I build anew on my initial goals to create a new *contract* of expectations and behavior. This

annual evaluation establishes mutual objectives that bind us -kay and professional -- togetkermm common effort to get through tomorrow in a better fashion than we made it through yesterday.

in summary, in those critical first months, look, listen and begin to establish your relationships with the president, the board of directors, lay leaders, staff and the community. Utilize the qualities and skiMs that were the obvious attraction in your se'lection. Concentrate on deveoping ahort'term.achievable goals. Allow the 'ong-term vision to develop over ti me. Keep your president informed. Share your strategy with the key players. Use incrementa successes to build upon.

Action Points

- . Have you set short-term goals?
- ° Have you set longer ones?

Whom have you shared these with?

Relating to Power People

Lester Kaplan
Executive Director
JCC of Greater Washington
Rockville, Maryland

Some important *principles* of working with power people in the agency and community.

Perception of power. Relating to people who are thought to have power, whether or not the perception is accurate, usually produces anxiety which, in turn, fosters the potential for both positive and negative behavioral manifestations.

On the positive side, the executive needs to be well-prepared, work hard and motivated to *achieve*. On the negative side, the executive can become secretive, withholding, dishonest and, eventually, may even develop a psychosomatic illness.

Power. We all have power. We all lead successful lives with many degrees of accomplishment. Many of us have wonderful marital and familial relationships. Most of us have graduate degrees and are the highest paid individuals in our agencies. We are role models for most of the people with whom we come in contact. In our own universe we have *obvious* Often, we are intimidated and become anxious when we deal with key volunteers.

A significant difference when working with power people is the fact that we perceive the relationship to be inherently evaluative. Psychologically, of course, a negative evaluation can be perceived as rejection (which is related to the withholding of love, which is the essential ingredient necessary for an infant to survive). Practically, however, a negative evaluation can be related to loss of employment or decreased compensation and, possibly, to the end of a career.

Whether one views a potential bad evaluation from the psychological or practical, it sure doesn't feel good. This factor is a significant component that frames our behavior and is even more significant when we relate to lay leaders who have "real" power.

We define power as the perception by others of one's ability to influence others. There are, obviously, many ways to develop the ability to influence others, including wealth, status, intelligence, genealogy, etc. Success as an executive is directly tied to being able to relate to people with power. If an executive can relate to people with power, then the executive will succeed.

The ability to relate to power people is as important as all the other professional skills the executive has developed in order to become the director in the first place.

Skills. Professional relationship skills are imperative when relating to power people. The cornerstone of the best working relationship is trust. The skills and characteristics used to develop trust include honesty, consistency, reason, containment of one's ego, humor, timing prioritizing, clarity and the ability to focus. These are all components of a successful professional relationship. The ability to accept criticism and, most important, accurate introspection are imperatives for successful interaction with power people. It is the executive's precise understanding of his personality characteristics that provides the ammunition for non-defensive response. The secure executive responds to relationship issues; the bad executive reacts.

Relationships require hard work and a significant commitment of time.

Executives must be able to spend an appropriate amount of time and energy cultivating relationships with power people. Avoidance of these contacts, whether direct or by phone, can be particularly harmful or detrimental to the institution and the executive.

Action Points

- 1 *Do you have strategies for dealing with power people?*
- Do you need help and do you know who to turn to?*

Leadership Development

Burton Garr
Executive Director
Jewish Community Center

St. Paul, Minnesota

Leadership development: A high priority-and how it is achieved.

Leadership requires effort and sound planning. The program needs to be viewed as a total staff and lay leadership responsibility and should represent a high priority for the executive. The development of leaders is an ongoing process and takes several forms. It consists of incorporating new leaders into the Center, energizing and challenging existing leadership, and making effective use of seasoned leaders. A sound JCC leadership structure should maintain a balance of both new and seasoned leaders and the needs of both must be taken into consideration.

Leadership development for new leaders begins with reaching out to members to serve on committees. Systems should be developed that make the entry into the Center's committee structure accessible and inviting. The agency should *encourage* all staff and committee members to constantly reach out and identify people with interest and potential to become involved on a committee.

The committee represents a training ground for the development of leaders, and that experience has to be meaningful in order to stimulate ongoing interest and commitment. Therefore, committees need to be functioning effectively in order to provide proper training. Orientation of new committee members, identification of goals and purposes, and their relationship to the total agency structure are essential elements. Agenda items need to be challenging and the committee needs to be involved with meaningful decision-making which has an impact.

The effective use of people's time and their satisfaction with the committee process is a key ingredient to their remaining active and their desire to assume even greater leadership roles. The chairperson and staff are key players in nurturing the development of leaders in this process.

The role of staff is critical, as the agency is often viewed by the way staff handle their responsibilities. It is therefore essential that staff have a full understanding of the committee process, their role, the importance of developing positive relationships, and their responsibility for leadership development.

The formation of a sophisticated leadership development program is the next step. The individuals identified for this program should be selected based on their interest, commitment and potential, demonstrated by their committee participation. Upon graduating from the program they will be prepared to take on greater leadership roles.

In addition to dealing with issues pertinent to the Center, the content of the leadership development program should be such that the participants will not only be able to enhance their understanding of the Center, but will also be able to carry over to their own personal, professional or business lives what they have learned.

Overseeing this activity is a leadership development committee whose job it is to track all committee participants, making sure that people are moving through the ranks and do not get lost in the shuffle.

Additionally, the committee is concerned with the entire leadership picture, helping to plan the formal leadership development program, as well as providing input on seminars, forums and training program for existing leadership, in order to energize them and provide support.

The development of a mentoring program which utilizes the skills of seasoned leaders is also a task of this committee.

A concentrated effort and planned approach to leadership development with appropriate training will assure the Center of an ongoing cadre of knowledgeable people to move into leadership positions which are essential to its effective functioning.

Action Points

Is there a planned system to move people into greater leadership responsibility?

Is there a system in which committee members can receive feedback regarding their involvement in the committee process?

Staff Recruitment, Retention and Development-Strategic Tools

Michael *Witkes*
Executive Director
Sephardic Community Center
Brooklyn York

Understanding staff concerns and tools for hiring and retaining professionals.

The new executive is confronted by a host of pressures, not the least of which is the task of relating to and working with the existing staff of the agency. Their uncertainty as to the "nature of this new boss" often manifests itself in a variety of behaviors. It is essential that the new executive understand the dynamics at play and appropriately address these understandable concerns of staff. Time must be devoted to the needs of staff at the outset so that staff readily join with the new executive in making the Center work. Enlisting their assistance in considering any changes is a critical element in the transition process.

Although it is impossible for an executive director to be involved in every facet of job interviews for every staff opening, it is essential that the executive use his/her position in order to assist in recruiting and hiring the very best staff possible. An astute and sophisticated applicant will be concerned with the image, visibility and reputation of the agency's executive director. Therefore, once initial screening and interviewing takes place by an assistant or program director, no full-time professional should be hired without being interviewed by the executive director.

The executive director must be prepared to treat the hiring of professional staff as one of his/her highest priorities. The hiring process begins at the initial interview and continues throughout the professional's orientation with the agency. The strategic tools listed below all contribute to the successful hiring and retention of professionals.

The first five deal primarily with recruitment while the remainder have a greater impact upon the retention of staff. All of these comprise a complete process for the recruitment and retention of quality staff.

Direct Recruitment - Do not leave this to others. Personally contact JCC Association Personnel Services, schools, etc. Project your influence and power in recruiting top quality staff. One of the best places to look for staff is in your "own backyard." You should direct attention to summer camp counselors and part-time staff; seek referrals from present employees; and keep an eye out for people from your community returning to the work force.

2. *Time Commitment*- Be prepared to personally interview all finalists *and* all upper management applicants. No *serious* interview should be less than 90 minutes.
3. *Written Job Descriptions*- Prepare them and share them with all applicants.
4. *Center Benefits*- Full family membership, health club, day care, early childhood and camp benefits *are* all attractive perks to provide to employees. *If* these *benefits are not* presently available, the executive director *can use* his/her influence *in* making them possible.
5. *Salary Packages* - The executive director's ability to recruit and retain quality staff will ultimately *hinge* upon the ability *to* provide competitive salaries and appropriate benefits.
6. *Orientation and Supervision* - The *new* professional should be provided with a systematic *and* well-planned orientation *to the agency*. Make certain that *formal* and *ongoing* supervision *is* provided. New professionals should meet *with* his/her supervisor regularly *for* at least one *hour of* uninterrupted *time*.
7. *Personnel Practices or Staff Manuals* -Prepere them *and share* them *with* all applicants.
8. *Conferences and In-Service Training*- Help staff participate *in* JCC Association, MCP, and *other* training *seminars*.
9. *Affiliation with Professional Associations*- Encourage workers to join their respective professional organizations *and be active, in* order to *give them a* broader perspective *of the field*.
10. *Image and Relationship Building* - Provide concrete opportunities *for* staff to formally and informally relate to leadership by attending board meetings, *social* events, *etc*.
11. *Career Planning* - *Openly* discuss *future* growth opportunities within the Center and within the field at large.
12. *Morale Building* -Compliment staff through *a memo when* appropriate *and* send a *copy to* leadership. Send personal birthday, anniversary and condolence cards. Establish Professional *of the* Year Awards.
13. *Personnel Committee*- Involve lay leadership *in* the personnel process by developing *an active* and high-powered Personnel Committee. Through *this* committee lay leaders *are* educated about *the issues which* impact *on* recruiting *and retaining* quality staff.

The executive director's role in influencing *and* implementing all *of the* above will play a major factor *in the agency's* ability to *recruit, retain and*

develop an exceptional staff. Staff is the foundation upon which our centers can provide quality programs, strengthen membership development and retention, and increase program registration. It is one of the executive's highest priorities.

Action Points

Have you developed a staff recruitment plan?

Staff retention - are you giving thought to specific programs and strategies to retain staff.

Agenda Building

Stanley Ferdman
Executive Vice President
JCC Association
St. Louis, Missouri

Your first board meetings and how to build an agenda.

The effectiveness of a Board meeting is crucial to the sustenance of a board. Effective board meetings are extremely valuable to the success of an agency, as they provide the:

1. Key to knowledge and education about the Center
2. Key to identification with the Center
3. Key to special recognition of individuals
4. Key to esprit de corps
5. Key to participation of board members
6. Key to member attendance at board meetings

Creation of the board agenda requires that the executive involve others. In order to avoid the creation of an agenda in a vacuum, it is suggested the following should be considered at administrative staff meetings:

1. Decide issues to be discussed and decide what should be discussed with the board.
2. Determine decisions or resolutions brought forward from committees for board consideration and action
3. Identify special department programs which should be shared with the board
4. Determine which chairmen, individual committee members or board members need some kind of recognition
5. Plan to highlight at least one program area at a board meeting

Board agenda development uses a team approach in which the executive brings information and recommends items to the president.

In this process it is extremely important to determine the placement of items on the agenda. The agenda should consist of a variety of discussion items, reports and policy issues to be voted upon. It is important to pay special attention to the positioning of agenda items, so that they don't negatively impact on other critical discussion items by using up too much time.

In planning the board meeting with the president, there are several factors which should be taken into consideration. These include:

- Beginning and ending the meeting on time. Most meetings should not run beyond two hours.
- 2. Having an appropriate amount of time available so that issues can be fully discussed with everyone having an opportunity to participate.
- 3. Being certain that a minimum of one decision can be made at a meeting, and preferably, at least two issues which require debate and vote.

When possible, varying methods of presentation should be considered, including the use of video, overhead projectors, small table discussions, etc.

The opportunity for a board member to be directly involved usually will determine his/her attendance at future meetings. If the board is asked to sit passively for two hours through lectures or reports and isn't afforded the opportunity to be involved and participate, there is the strong likelihood that attendance at future meetings will be reduced.

Action Points

= Have you and the chairman of the meeting discussed the agenda in advance?

o Have you discussed the placement and timing of agenda items?

~ Have the presentations been prepared?

How Do I Know When I Need Help?

*Stan Siegel/
Executive Director
Greater
Bridgeport, Connecticut*

Four principles for knowing when help is needed.

1. Have You Prepared Your Lay People for the Meeting?

Are you sometimes confronted by key lay people who wonder why they weren't told something in advance of a meeting?

The basic rule of thumb is that no one likes surprises. No matter how unimportant a topic or sub-topic may be or how trivial a detail, key individuals resent finding out things for the first time in a group setting. It makes them feel as if they weren't part of the "full decision-making process" or not important enough to be consulted. On the other hand, involving key people personally and individually on ideas and information makes them feel connected and valuable.

2. Have You Planned For Your Cash Needs?

Do you find that too often the cash crunch comes too fast or unexpectedly? Do you frequently call the treasurer about difficulties in meeting payroll or payments to vendors?

While the budget is a measure of our management performance, it is a positive cash flow that keeps the building open day to day. Planning for cash flow needs requires a financial model which allows you to forecast well in advance when you'll have a cash shortage - and even how much. Going to the Federation or the board for special cash needs two months in advance of the need suggests planning and even some measure of control. On the other hand, an "eleventh hour" frantic hunt for cash creates confusion and uncertainty about the Center's ability to manage its affairs. When this happens, it's time to get together with your financial officers, accountants and any other advisers to create a cash model which will serve you well -- not to solve your financial problems, but to help you to anticipate them and plan for remedies.

3. No Surprises: Keep Your President Informed

Is your president calling you to inquire about things that he or she hears from others? Does the president express frustration in getting information that she needs to know?

An open, informed relationship with the president is critical for the executive to establish. It must be appropriate as well. The president needs to be considered as the chief volunteer officer and must be kept abreast of developments accordingly. At the same time, there's no need to undignify the position by involving the president on minutiae that should not occupy his time. The time spent between the executive and the president is valuable and, in many cases, limited. Agree early on how it's to be used and how information is to be passed on.

4. Have You Delegated Authority to Your Staff?

Do staff express wonder when announcements are made? Do you find yourself handling every problem or emergency? Do things come to a standstill when you're absent *from* the agency?

It might be natural for a new executive to bask in the power that comes with knowledge and control of every situation and aspect of the Center's work. However, no one person--not even the executive--should be the sole repository of all information and knowledge about the agency. Delegating responsibility, sharing knowledge and seeking ideas is a necessary and desirable trait of management. From a practical point of view, it allows the executive to be away and still allow the agency to function on every level of management and administration. More important, it breeds teamwork, promotes greater dedication to the organization and stimulates growth and confidence of staff. Sharing knowledge and control is a sign of trust and confidence; it's also good management.

Action Points

^e *How is your cash flow?*

Are you keeping your president informed? No surprises.

Where Do I Go When I Need Help?

Avril Nak, Director
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Los Angeles, California

A list of suggestions on how to avoid a crisis.

As we ascend the career ladder, we face new situations that will require new and creative interventions.

Based on the premise that it is preferable to deal with a situation before it becomes a crisis, it is important to know when to ask for help. Although there is no ready rule of thumb to determine "when," it is best to confront each situation as it occurs and, if necessary, to err on the side of being cautious and to seek assistance if you have any doubt.

For many of us, achieving the position of JCC executive means we are not only in a new professional role but also in a community that is unfamiliar to us. In addition, we discover that being the senior professional in an agency means that we no longer have our supervisor to turn to, and we no longer have the support of other agency staff who we can easily consult on a collegial basis.

We know that there is no question of *if* we will need help, but rather *when*.

For three reasons, we should prepare as much as we can in advance for that eventuality. There are two major resources to develop: your ability to help yourself, and resources outside of yourself.

As the demands of the position become more apparent, you can begin to make an inventory of your own skills and knowledge and see how they match up with job demands. Those areas of relative weakness should become targets for development of skills and knowledge. By using educational resources and opportunities, including those that may be available through attendance at selected conferences and seminars, you can begin to close those gaps.

Of course, there will always be those situations in which you will want to look to others for expert input, advice or feedback. With reference to the suggestions that will follow, it is important to lay the groundwork for the requests for assistance you will ultimately make. Therefore, developing an inventory of the kinds of help or advice you might need in a variety of areas (e.g., political, fiscal, management, personnel, etc.) is a good way to start. Then you can begin to develop and maintain relationships with those individuals whom you think will be helpful to you in dealing with those concerns.

Who are some of these individuals?

1. **Your JCC Association Consultant.** Here is another professional who knows something about your agency and is experienced in dealing with many of the same problems you will face, but who also brings a degree of objectivity.
2. **JCC Association Specialists.** Your consultant can refer you to other members of the JCC Association staff who may have particular expertise about the kind of situation in question. This also applies to "experts" at other national agencies.

Other Colleagues. There are other high-level professionals in similar work in your community, e.g., Federation, Jewish Family Service and United Way agency executives. There are opportunities at conferences to develop relationships with other Center executives from similar size communities. Executive conferences provide an excellent opportunity for networking and consultation.

4. **A Mentor.** Some of us have been fortunate to have developed a relationship with another professional from whom we have learned or whose counsel we especially trust. The ethics of our fathers teaches us "Aseh Lecha Ravi" Make for yourself a teacher or mentor. If you don't have one, find one. It will reduce that lonely feeling at the top.
5. **"Elder Statesmen."** These are senior leaders in the community who may not be actively involved on a day-to-day basis but who have maintained an interest in the Center and have political "clout" and expertise. They can be particularly helpful in dealing with sensitive political situations.
6. **Local Experts.** There are many experts in our communities who have special expertise that may be exactly what we are looking for. any of these individuals are in professional practice or the academic world. They may be found both within and outside our constituency.
7. **Board Members, Committee Members, Center Members.** Depending on the sensitivity of the problem requiring resolution and our own level of confidence and trust, these resources can be very helpful and also provide an opportunity to build involvement and commitment to the Center.

The preceding list is certainly not exhaustive, and the suggestions are not mutually exclusive. The important thing is to develop these resources, and then use them appropriately.

Action Points

if Ask for help when you need it.

identify resources in advance that might be helpful to you in solving problems.

Relationships with the Jewish Federation
and United Way:
The Role of the Jewish Community Center
Executive Director

Kenneth D. Light
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Tucson, Arizona

Building bridges with *Federation and United Way*

The primary role of the Jewish Community Center executive in relation to the United Way or local Federation is one of bridge building: building relationships around personalities and around knowledge so that liaisons can be formed. This amounts to the conscious use of self in developing relationships. The developing and nurturing of relationships is of primary importance. Seek the opinions of Federation and/or United Way executives regarding the perceived strengths and weaknesses of the JCC. An of this is important not only to enhance and maximize the funding potential from these organizations but to successfully negotiate the priorities and politics at play.

The relationships among agencies themselves and between the agencies from the relationships which exist between people. These relationships are at least as diverse and certainly more complex. They demand an unquestioned respect for the integrity of one for the other and an absolute trust that each within its function and perspective is equally concerned with the general community welfare.

Working with different types of executives requires different skills. The challenge for the JCC executive is to develop positive relationships with all. The relationship factors include such items as accountability (equal but not equal), autonomy issues, a difference of opinion on community needs/priorities, overlapping leadership (which can be a positive or a negative), competition with other agencies, ego needs and overlapping constituencies. There are number of strategies for success in developing these relationships. These include: displaying an interest and concern for the total community; personal involvement and leadership in fund-raising campaigns and special task forces; and demonstrating team effort, partnership, and a desire to see Federation be successful. Additionally, it is important to maintain open communication, provide recognition for programs funded by Federation, advocate the involvement of our lay people in both Federation and United Way, develop collegial relationships, reaffirm the "two-way street" (they need us and we need them), and keep conflicts contained and handled appropriately.

There are several factors which either facilitate or block communication. To facilitate communication requires a team approach and partnership attitude, understanding of each other's needs and a respect for each other's job and responsibilities. This, obviously, is predicated on openness and honesty. Blocking effective communication fosters a competitive attitude and keeps one totally focused on his or her agency.

Our leaders require from us the ability to maintain good relationships with our funding bodies,

We must remember *that priorities and relationships are* obviously key elements. As a capsular summary, below *are a series of questions* which I suggest we should all be asking ourselves as we seek to further develop the effectiveness of our inter-agency *and* interpersonal relationships *with these entities.*

- * When was the last time I checked my agency's priorities for compatibility with those of the United Way and/or Federation?
- * When was the last time I had lunch with the executive of the United Way and/or Federation? (or allocations and/or planning staff, etc.)
- * Have I orchestrated a dialogue between my key leadership and the leadership at the United Way and/or Federation around priority setting in communal agendas?
- * Have I invited key personnel (professional and/or lay) from the United Way and/or Federation to visit my agency to see firsthand the quality of services they are supporting?

In times of shrinking resources, it becomes even more important for us to develop all potential funding sources. Due to our additional need to "build community," it is incumbent upon each of us to cultivate the relationships that will help us achieve our varied objectives. In sum, it would be fair to say that our agencies *are* seen as a reflection of ourselves.

Action Points

- * *When was the last time you had lunch with the Federation executive? United Way executive?*
- * *Are you taking other opportunities to develop an ongoing relationship?*

Revenue Enhancement | Role of Executive and Board

Karen S. Stern
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What is revenue enhancement and how can executive and board achieve this?

Revenue enhancement is one of the key areas of executive and board involvement. Revenue enhancement is special vent fund-raising and endowment programs; foundation grants and corporate gifts; and individual contributions and business underwritings, It is also new membership recruitment strategies and developing "profit centers" in programming areas. and is the term used to incorporate the many ways we look to increase the revenue and income side of our budgets. It is one of the most exciting areas of Center work because it is always a challenge, and demands creativity, flexibility, risk-taking and responsibility. The atmosphere in each dCC must support the approach that all legitimate revenue enhancement activities are important and essential to the fulfillment of the Center's mission.

Role of the Executive

The executive has many different roles in the area of revenue enhancement:

1. The executive is responsible for understanding the budget and the fiscal concerns of the Center. The executive must have a clear picture of the Center's financial strengths and its needs. Staff, with insights and oversight from lay leaders, must see to it that their JCCs are operated in the most economical and fiscally responsible manner possible. It is much cheaper to save a dollar than it is to earn one. She/he must continually review fees and program costs so that enough earned income is generated to help cover the real overhead, scholarship assistance and other charitable works.
2. The executive is responsible for communicating. Once the executive knows and understands the financial picture, it is essential that he or she share this information. The executive needs to communicate with key management staff and with the board. *From the beginning of our contacts with prospective and new board members, we must make sure they understand that one of the key responsibilities of Trustees is in the area of fundraising, assuring that the agency has adequate funding.*
3. The executive is responsible for involving others. Motivating staff is as important a first step as is motivating the board. Looking for ways to increase revenues becomes everyone's challenge when everyone

is included in the challenge. The issue of involving others is more than an issue of delegation. It is an issue of empowering staff to be creative, motivating staff to become part of the solution, demonstrating teamwork by being inclusive. Delegating responsibilities and supervising are key roles for the executive. Hiring staff who are skilled in the areas of committee work and grant-writing will often generate enough money to be truly cost effective. The executive is also responsible for motivating the board and for making sure the board is made up of members who understand revenue enhancement opportunities and challenges and can respond to them.

4. The executive is responsible for overseeing the development of a plan. If a \$75,000 deficit is projected for year-end, then it is up to the revenue-enhancing programs will be put in place. A \$10,000 shortfall would require a different strategy or solution than a \$75,000 problem.
5. The executive is responsible for knowing people and the community, The executive uses him/herself very carefully in this area. To raise funds and make contacts alone may be appreciated by the board but does not involve the board or staff in a long-term commitment to the Center.
6. Staff must work closely with lay leaders and help them in all aspects of fundraising. We need to provide reliable, accurate and accessible background materials before solicitations. We have to provide much of the detail support for special activities and be the ones to prepare the proposals for submission to institutional and government funders.

Role of the Board

The partnership between board and executive is essential in the area of revenue enhancement. The role of the executive is to understand, to communicate, and to make sure that a plan is put in place. The role of the board is critical, and they must be prepared to "give" and to "get" funds for their Centers to the best of their abilities.

1. Agencies must encourage lay leaders to assume their fundraising responsibilities by providing Trustees with the education and training which will make them feel more comfortable in fundraising.
2. The board is responsible for understanding the financial situation of the Center. The board should hold its financial officer and president responsible for helping the executive understand the financial realities.
3. The board is responsible for working with the executive and staff in determining a plan to help increase revenues.
4. The board is responsible for implementing the revenue enhancement plan with staff support as delegated by the executive. The board

committees would make phone calls and follow through with individual contacts for endowments. People still give to people. Staff can prepare materials, and assist the board with all administrative tasks. But the most effective revenue enhancing efforts are still carried out by board members assuming the leadership roles, talking to their friends and associates. In this context the JCCs must develop *methods of recognizing and thanking /ay leaders for their own gifts and for their fundraising activities.*

When it comes to implementation of the plan, it is important to be flexible in determining specific roles and responsibilities. It is more important to take advantage of individual strengths in this area than to determine fixed roles. But it is in the best interest of the Center if the board takes a key leadership role in implementing the plan, making the contacts and playing a key role in the direction that the plan will take. The board involvement and commitment in revenue enhancement will help assure the financial stability of the Center. The executive and staff cannot do this alone, and board members can only be effective if they are committed to the Center.

In summary, it is the role of the board to understand the need communicated by the executive and then to work in partnership with him or her to develop and implement the plan.

Revenue enhancement is an area which requires a strong partnership between the executive and the board. It is essential that individuals who are skilled in the area of revenue enhancement become part of the Board of Directors. It is the role of the executive to remind nominating committees of this reality. It is essential that executive and board have a shared vision for the Center, that they both trust each other and that both executive and board see their relationship as a partnership, with each working toward achieving the same goals. A good beginning effort would be establishing an effective Planned Giving Program for Youth Services which could also be used as a model for any of your Planned Giving programs; entrepreneurial ventures; and special events to raise funds.

Action Points

- *Set clear goals and objectives for your fundraising efforts and regularly evaluate your results.*
- ° *Maintain a balanced approach to Revenue Enhancement which includes (1) planned giving, (2) special events, (3) grants, (4) government contracts and (5) individual gifts.*
- o *Use the JCC Association and your colleagues as resources to find new ideas and successful approaches, You don't have to a/ways reinvent the wheel. But you do have to know where to find it.*



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