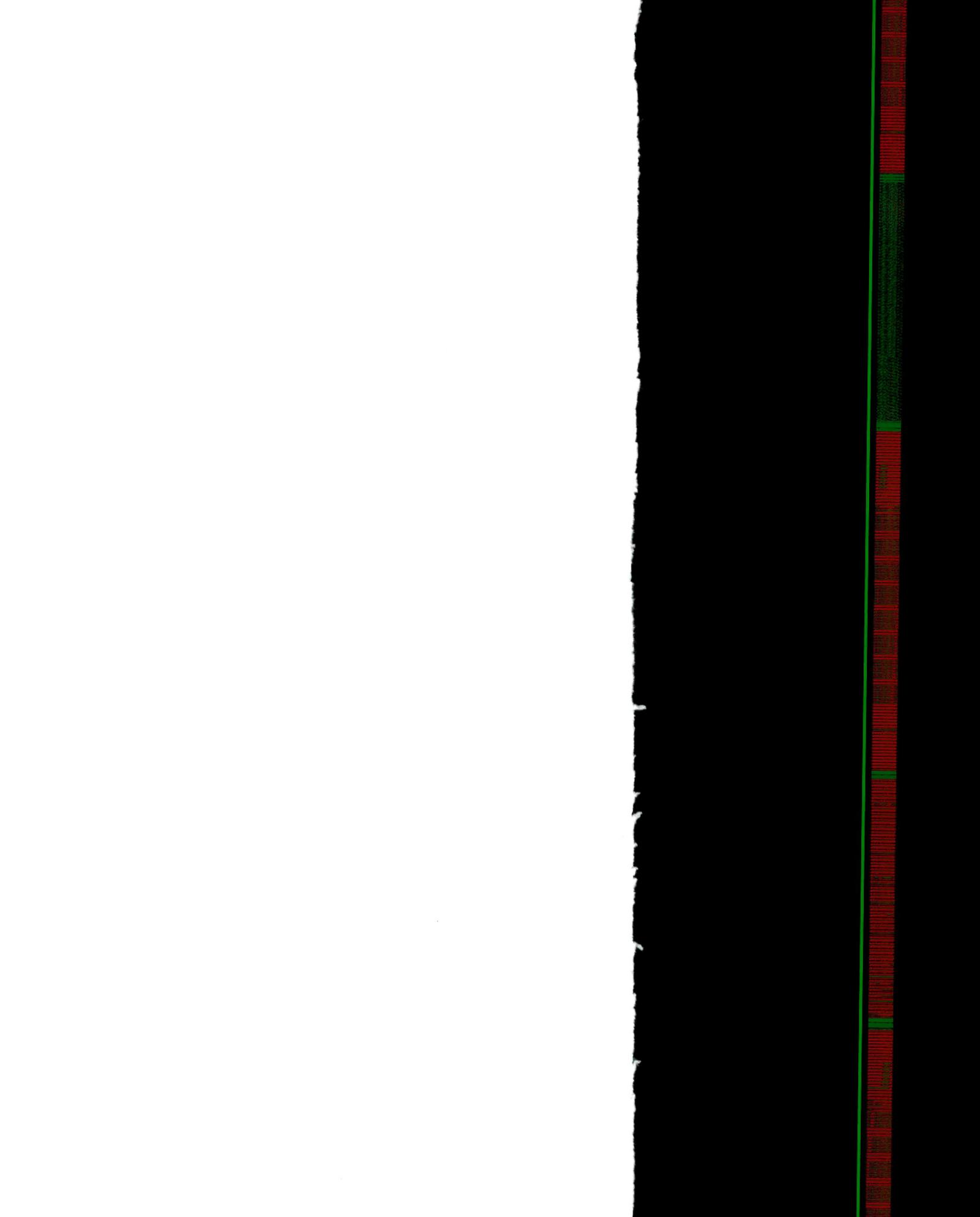המרכז הירושלמי לענייני ציבור ומדינה

Jerusalem Center for Public Affairs

American Jewish Leaders View
Board-Staff Relations

Gerald B. Bubis and Steven M. Cohen

AMERICAN JEWISH LEADERS

VIEW BOARD–STAFF RELATIONS

Gerald B. Bubis and Steven M. Cohen

Jerusalem Center for Public Affairs

1998

THE JERUSALEM CENTER FOR PUBLIC AFFAIRS

The Jerusalem Center for Public Affairs is an independent, non-profit institute for policy research and education serving Israel and the Jewish people since 1976.

The Center's principal program areas are: **Israel's Internal Agenda; Study of Jewish Community Organization; Jewish Political Tradition; Federalism; the Israeli-Arab Conflict; Israel-Diaspora Relations; Political Economy; Local Government; West Asian/Mediterranean Studies; and the Study of Educational Systems.**

The Center is operated by boards of Overseers and Fellows, and is headed by Professor Daniel J. Elazar, its President and Founder. The Director-General of the Center is Zvi R. Marom.

Over more than two decades, some 200 researchers from Israel and abroad have participated in the Jerusalem Center's various studies, including some 40 permanent Fellows. Since its founding, the Center has produced some 350 publications in Israel and abroad in Hebrew, English, and other languages, which report on the results of research undertaken within its framework. These publications have been produced under the Center's own imprint as well as in cooperation with prominent publishers abroad.

The Jerusalem Center has undertaken numerous studies at the request of government and public bodies, and has organized international conferences and seminars with the participation of leading experts from Israel and abroad. These have resulted in numerous JCPA publications in the form of working papers, books, and articles in such areas as:

- The Israeli Economy and Privatization
- The Arab-Israeli Conflict
- Law Enforcement in Israel Toward the 21st Century
- Constitutional Reform
- Jewish Migration
- Israeli Druze
- International Jewish Women's Human Rights Watch
- Local Government in Israel
- Israel at the Polls: Election Studies since 1977
- Federal Systems of the World
- Understanding the Jewish Agency

The Milken Institute for the Study of Educational Systems (formerly the ISES Institute), has been operating within the framework of the Jerusalem Center since 1991, to initiate and conduct research on the educational system in Israel. The research studies of the Milken Institute published to date have dealt with a wide range of issues on the agenda of education policy-makers in Israel: education budgets, education policy, unity and pluralism of school curricula and culture, gray education in Israel in the 1990s, and decentralization of authority over education to local governments.

For additional information and to order publications in English and Hebrew, please contact:

Jerusalem Center for Public Affairs
Beit Milken, 13 Tel Hai St., Jerusalem 92107, Israel
Tel. 972-2-5619281; Fax. 972-2-5619112; Email: elazar@vms.huji.ac.il

Center for Jewish Community Studies
1616 Walnut St., Suite 507, Philadelphia, Pennsylvania 19103, U.S.A.
Tel. (215) 204-1459: Fax. (215) 204-7784

CONTENTS

Tables and Figures:

FOREWORD

Daniel J. Elazar
President, Jerusalem Center for Public Affairs

The Jerusalem Center for Public Affairs is proud to present the results of the survey of board-staff relations conducted by JCPA Vice President and Fellow Gerald B. Bubis and JCPA Associate Steven M. Cohen. Professor Bubis's long years in the field were capped by his founding the Hebrew Union College-Jewish Institute of Religion School of Jewish Communal Service, an institution that, thanks to him, has made an indelible mark on the profession, especially at its higher levels. During his tenure he became President of the National Conference of Jewish Communal Service, gaining the highest possible recognition from his peers. During all of these years he has taught, written, and spoken extensively throughout North America and the world and has trained so many voluntary and professional Jewish leaders that the list is beyond completion. The Jerusalem Center always has been honored to have Professor Bubis as one of our leaders and leading figures.

Professor Steven M. Cohen is one of the leading sociologists of American Jewry. His survey work and analysis have drawn both acclaim and serious attention from the community and from his peers.

This study was initiated in response to an increasing flow of anecdotal information about growing tensions between voluntary leadership and staff in Jewish agencies. As this report indicates, the survey results revealed that at least on the intellectual level there is far more agreement than evidence of conflict. The convergence of opinions in this study may well reflect the respondents' commitment to the idea of consensus that tends to dominate American Jewish communal life even where real problems of dissensus might exist. That is something about which we can only speculate on the basis of the data. At the same time there are indications of tensions, squeak points, and potential for conflict that require some attention, and other evidence for areas in which both volunteers and professionals could be strengthened. This report includes recommendations along those lines.

The development of a professionally trained and employed Jewish communal civil service is in many respects an American Jewish phenomenon first and foremost. The American Jewish community has pioneered in the development of that civil service and leads the world in its recruitment, employment, and utilization. While other diaspora Jewish communities have not moved down the American path as quickly, more are beginning to follow suit.

The distinction between lay leadership and professional staff is a modern Western development, perhaps most characteristic of the United States where this structure was part of the ideal of the Progressive movement at the very end of the nineteenth and early twentieth centuries. Historically, it is not indigenous to Jewish communal organization although it was embraced wholeheartedly by American Jewry almost from the first.

Indeed, the sharpness of the distinction suggested by its original Progressive model may not be too Jewish. In the Jewish model, every member of the community does his (and now his and her) share according to his or her capabilities, education, and status. In the past, the major divisions were between those who have *hereditary* roles such as *cohanim* (priests) and *leviim* (Levites), on one hand, and the general run of Israelites, on the other, traditionally referred to as the *keter kehunah* (the domain of priesthood); by *education,* as with sages and rabbis, on one hand, and the general run of Jews (including *cohanim* and *leviim*), on the other, traditionally referred to as *keter torah* (the domain of Torah); and by *election*, often linked to wealth and status, such as between *parnassim* (officers of the community), and other community members, traditionally referred to as *keter malkhut* (the domain of civil governance).

While in earlier days it was assumed that most of these positions would be covered by volunteers and not require salaries, there were functions that did involve major commitments of time on the part of people of limited resources who were paid salaries or fees for their work. However, this was presented not as pay for services rendered but compensation for time that had to be devoted to rendering those services which could otherwise have been used for other forms of economic activity; known in Hebrew as *bitul zeman.*

That system remains the Jewish ideal, but the complexities of modern life have led to the necessity for professionalization and appropriate compensation. In this study, we focus on the *keter malkhut*, the domain of civil governance, today principally manifested through the federations and the "family" of federation agencies.

The increasing range of activities of paid professional staffs in Jewish organizational life in general and the growing blurring of roles between professionals and volunteers in the last years may well be a reflection of the inappropriateness of a rigid volunteer-professional model within the context of Jewish political culture. The fact that Jews view themselves as each other's equals under almost all conditions and, in addition, have opinions and views of their own and are not deferential to those who are presumed to be their leaders, contributes to the easy tendencies of staff to assert themselves in areas which the models suggest belong to a voluntary leadership and vice versa.

It may be that we need to develop another basis for defining authority, power, and responsibility in the Jewish community than our present one, a basis more in keeping with the culture of the people employed and the people they serve. This report should help in throwing light on that possibility and in communal consideration of it.

Another characteristic of Jewish tradition is that there is no such concept as "lay person." That is a concept borrowed from Catholicism where priests are endowed with sacerdotal powers to administer sacraments that place them in a very different catagory with regard to their authority, power, and responsibility than ordinary lay people who have not been so sanctified. In modern times this distinction between the specially sanctified and the ordinary was borrowed by the secular world to distinguish between those who are specially trained and compensated for their work (professionals) and those who are not but play some active role (laity).

This is very different than the Jewish idea of all Jews being *baalei batim* (householders), either in fact or potentially, a kind of position of citizenship that gives them a certain equality in conducting the affairs of the community within the limits suggested at the beginning of this Foreword.

In presenting this study to the Jewish world, the Jerusalem Center hopes to enrich the community's understanding of the present situation with regard to Jewish communal leadership and suggest directions for improving it.

AMERICAN JEWISH LEADERS VIEW
BOARD-STAFF RELATIONS

The Study and Its Background

The Jewish community's history of governance can be traced back to biblical times. Whatever the vicissitudes and geopolitical realities, Jews constantly re-invented themselves through their community structures (Elazar 1995). In the United States and Canada, models of governance have been influenced both by Jewish models as they evolved through the millennia (see Foreword) and by the North American models of modern management and governance within voluntary organizations.

The institutional system of Jewish organization is now responsible for monitoring an enormous amount of money. About $4 billion a year is raised voluntarily, or paid in fees for Jewish community and other government-funded services, exclusive of hospitals under Jewish community auspices (Wertheimer 1997).

By law, a not-for-profit organization is required to have a voluntary board of directors to oversee and maintain the use of these funds. At the same time, all agencies and organizations in the "Federation family" are run on a day-to-day basis by staff who are paid for their services.

Over the decades, a body of literature devoted to the general non-profit sector (NPS) has emerged. Countless evaluations and studies have been conducted examining the relationships between staff and volunteers in the board-staff context, yet no such study had ever taken place within the larger Jewish community (Bubis and Dauber 1985; Conrad and Glenn 1983; Chait and Taylor 1989, Kramer 1985, Teller 1995, Wood 1989).

Models of Governance

The research literature distinguishes several models of board-staff governance in the non-profit sector. Of course, reality is more complicated; no organization actually functions in a simple and consistent way. The principal ideal-typical alternatives include the *collaborative model* (Conrad and Glenn 1983, Bubis and Dauber 1985); the *volunteer management model,* with board as boss and staff as technocratic employees (Kidneigh 1948); the *staff management model,* with board as governors, as in the for-profit sector and senior staff as CEOs with major responsibility for policy and practice (Teller 1995, Drucker 1990); and *the contingency model* where roles are defined by the situation (Kramer 1985).

In all models, the authority of the board of directors as the repository of ultimate legal power is clear. The law sanctions the board of directors and holds them responsible for fiscal oversight, delineating major agency purposes, hiring, evaluating, and firing the executive director. Other roles and functions of the board of directors relate to fund-raising, interpreting agency purposes to the community, consulting with staff on an on-going basis, and helping to craft and deliver services. These vary from setting to setting. As a result, the expectations that an agency (and, by inference, the community) hold of board members vary from organization to organization. Furthermore, the agency's mission will define and often confine the board members' roles.

For example, within the Jewish community the major agencies and institutions present models of service which call for differentiated board roles. Synagogues (which are not part of this study) tend to have boards that are very active in the implementation of much of synagogue life. The size of a synagogue can mitigate these roles, but it is not uncommon for many so-called staff roles to be performed by volunteer leaders. Book-keeping, implementation of services, administration of educational services, assisting in instruction, newsletter preparation, assistance in maintenance, and preparation of meals are just some of the functions performed by volunteers in synagogue settings. This list does not even include the central function of synagogue life — Torah reading and the worship services themselves — which are often performed by volunteers.

At the other extreme, the Jewish Family Service and all other counseling services per-form functions which, by their nature, have markedly delineated staff roles. Licensure, confidentiality, and identifiable professional roles keep volunteers in the governance process from taking on many staff roles. In the rare circumstances when volunteers do choose to function in roles that are identifiable as staff roles, they must study, take staff-developed orientation courses, and function under the supervision of staff. They are evaluated by staff and can be terminated by staff. These volunteers, who may be board members, are in these instances suspending their governance-related roles to become staff, albeit unpaid.

Jewish Community Centers stand somewhere between these two models of service de-livery. Few JCC services entail issues of licensure except for early childhood and kin-dergarten teachers. A board member may possess the competencies required to pro-vide good group services, physical education activities, or educational activities. In these instances the board member may indeed perform those services as a volunteer or as a part-time paid employee. He or she then has to master the ability to "play" roles appropriate to the function. The Judaic studies professor who is a board member and teaches a series on Bible must learn that in one instance he or she is in theory an em-ployer, and at other times is functioning as an employee. This situation may be a bit schizophrenic, but it is not at all uncommon.

Federation and Jewish community relations council (JCRC) board members tend to re-late to staff in entirely different ways. The staff's competencies can very well be shared

by volunteer leaders. Fund-raisers end up deciding who will see a prospect based not upon roles (paid or volunteer), but upon who knows the giving prospect best, or who might have the most influence or leverage.

The ultimate roles in community relations are equally blurred. The relationships one has will far more frequently decide who will contact the public official whom the agency wishes to influence. Sometimes, as is the case in fund-raising, staff and board members might form teams to approach the person from whom money or favorable decisions are sought.

The Jewish community thus has a number of different kinds of agencies which call for differing roles by the volunteers. In all instances, where the ultimate power is in the hands of volunteers, opportunities exist for blurred areas of contact and action.

The models noted here provide differing guidelines for board-staff relations in their pure forms:

The Collaborative Model

In this model the functions which must be performed at the governance level generally encompass the following:

1. Hiring and evaluating the chief executive officer
2. Overseeing the agency's operation, including selection and training of board leaders
3. Implementing policy
4. Securing adequate resources (financial resource development)
5. Setting in place evaluation procedures, personnel policies and practices
6. Guiding volunteer and staff resource development
7. Planning agency services, engaging in program development, and functioning as interpreters to the community.

Other than hiring and evaluating the chief executive officer, staff involvement is sought and sanctioned in increasing proportion as one moves down this list of functions. In turn, volunteer involvement and input increases as one goes up the list, but is never absent at any level. The actual division of roles between staff and board members is decided time by time and function by function through discussions among the staff, board, and committees involved. In this model the clarification of role delineation — what the staff and volunteers will do — is based upon a mutually arrived at understanding of the expectations of each — an implicit contract, if you will. In this model, staff understands that there may be a number of simultaneous contracts. One staff member may work with a number of different chair people. In each instance it is the staff person's responsibility to ascertain what the volunteer expects of him or her and vice

versa. In the best of cases, the volunteer also takes the time to understand the staff person's expectations of him or her. The issues involved may include who takes minutes, how agendas are agreed upon, presence at meetings, where staff and volunteer leaders sit at staff meetings, who speaks for the agency, who appears on television, the initiation and signing of correspondence, announcements, and checks, and agreements to limits on expenditures by staff. The list is long and all these issues require clarification before the fact.

Table 1

THE COLLABORATIVE MODEL OF GOVERNANCE

Volunteer-Staff Functions

Volunteer   Staff

Executive Hiring and Firing
(Evaluation)

Oversight (with Staff Input)
including Election of Leadership

Policy Formulation

Financial Resource Development

Evaluation Procedures

Board Recruitment

Human Resource Development

Planning

Program Development

Interpreters to Community
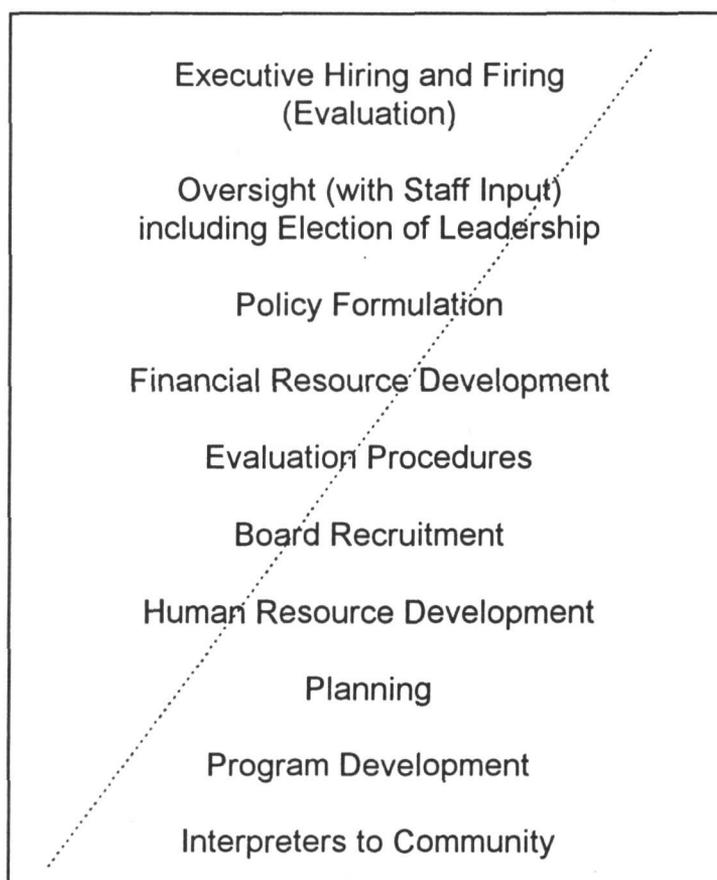
The professional CEO at the board level, and lower-ranking staff at the committee levels, take active part in the deliberations as appropriate. Observers at particularly large board meetings might wrongfully conclude that the CEO plays little or no role in formulating policy because he or she is often quite passive. Yet this ignores the much more active role the CEO will likely have already played in preliminary meetings with the president, at the executive committee itself, or at other important committees, in helping to shape policy which eventually finds its way to the board for final ratification.

Classically, in Federation settings, only volunteers asked for contributions. The preparation of the development plan, identification of potential donors, provision of appropriate material in a timely fashion, and follow-up with the solicitor were (and still are) seen as primarily staff functions, while the solicitation was always done by volunteer peers of the prospective donor. Today, however, staff have much more status. As fund-raising (fiscal resource development) has become more sophisticated, staff have often brought new approaches and information to bear in prospect identification and cultivation. This is often a laborious and time-consuming process, with fewer and fewer givers accounting for an increasingly high proportion of dollars raised as a result.

Further, relationships between high level staff and volunteers, in many instances, have become more extensive and intertwined. These and other factors have resulted in the highest echelon of staff becoming highly paid. These factors, in combination, have enhanced the status of staff as they increasingly demonstrate an indispensible role in the fund-raising process.

These relationships have often developed to the extent that a staff member is often the best person to ask for the gift. In this regard, historically, agencies other than Federations classically did very little fund-raising. In this age of less government funding and lower percentages of budget funding from United Ways and Federations, almost all agencies focus on funding development. In the past, few staff workers, who chose to work in family service, vocational service, or community center settings, who envisioned engaging in fund-raising to a serious degree. This is no longer the case.

The collaborative model becomes ever more in need of clarification for that reason alone. Yet other reasons present themselves. The increased complexity of organizational systems blur the roles because both volunteers and staff may share training appropriate to the agency's performance. It thus is too simple to utter such platitudes that board members formulate policy and the staff implements it; or that the staff does technical preparation for fund-raising, the volunteers solicit the prospect, and so on down the table. The functions in the table are rarely identifiable as solely volunteer or staff in their nature.

Thus, in the collaborative model there is no clear or sole "ownership" of any role except in hiring the executive and even here, in some agencies, staff members are involved in the selection process.

The Volunteer Management Model

The volunteer management model is rarely seen in today's North American Jewish communal scene, although it is still common in many countries throughout the world. The volunteer board members see themselves as the bosses and the staff as employees who are to perform their functions according to the wishes of the board members. The functions noted previously in Table 1 are controlled by the volunteers and, in general, are implemented by them. Staff members are used in narrowly constructed and perceived ways. They could best be described as "go-fers," ordered to go for coffee, take minutes, and follow the board members, both literally and figuratively. One of the authors, functioning as a trainer in a European country, observed a board committee of a home for the Jewish aged deciding on the admission of a client, to the extent of determining what bed in what room the client would be assigned. The executive director took notes in order to implement the decisions at a later time.

This model is seen in some agencies where the chief volunteer officer (CVO) functions as the CEO, with the acquiescence of the board of directors. Hiring and firing of all staff is done by the CVO or his or her designees, and if the staff functions with professional standards, it is often in a circumscribed way. This model often emerges where boards have delegated their decision-making powers to the CVO. He or she in turn is expected to provide the oversight functions and take charge of directly implementing the agency's mission.

Volunteers try to play the role of "boss" by putting staff in a subordinate position as the implementers of a policy which was arrived at with little or no staff input. This model by itself is not "incorrect." As an example, Hadassah, volunteer-organized and, until recently, almost totally volunteer-governed and structured, had most staff positions confined to technical backup and service to the board.

The Staff Management Model

This model is drawn from the business world. The board of directors hires staff who are expected to play a predominant role in policy formulation, presenting their visions, goals, and objectives with measurable targets for success. After the board modifies and then adopts the goals, the CEO is given wide latitude in his or her work, with success measured against agreed-upon expectations.

Many national boards have permutations of this model. The boards may meet a few times a year and delegate their power to a small executive committee which works closely with the CVO and the CEO. Such a board often gears its focus to long-range planning issues and, in concert with staff, fund-raising from major donors. Organizations using this structure tend to have a single-focus mission and are most frequently found in the Jewish community as "friends of" some international cause. Staff, in turn,

can function in much more focused terms in their goal fulfillment because of the specificity of these agendas.

Some national organizations function as umbrella organizations and/or multi-service organizations. The nature of their goals results in the involvement of more experienced volunteers in governance with shared objectives for board and program development. But, notwithstanding their talent and senoirity, even these instances tend to focus power in staff because board and committee members cannot be as involved on an ongoing basis as is the case in local settings. Recent technological breakthroughs (e.g., e-mail, faxes, teleconferences) have changed the culture in some instances, but it is too soon to judge the outcomes.

The Contingency Model

The premise of the contingency model is that organizations are not as consistent in their governance patterns as might seem to be case on the surface. Here, the nature of governance and the roles of volunteers in governance and agency service delivery are affected by: the nature of the personalities of the CEO and CVO; changing situations affecting the organization such as diminishing resources, staff resistance or resentment of the necessity for change; new expectations of an agency because of social change; expectations for entrepreneurial human services delivery; changing demographics; the changing availability and nature of volunteers; and other factors.

The Issues — Points of Tension between Volunteer and Professional Leaders

Regardless of the board model most applicable, instances of misunderstanding and conflict between board and staff occur with regularity. Issues relating to power are often at the source of the conflict: who decides what, when, and how; who gives orders; how are they embodied and transmitted.

Many board members complaining that they are insufficiently briefed in a timely manner with material that is useable. A number of board and committee members reported the experience of first seeing a major multi-page committee report on the day the board was expected to ratify the report. For their part, many staff members report being treated rudely by board members, being spoken to in condescending or insulting tones. Board members often report that they felt that staff did not remember that they were employees and not "owners" of the agency in which they worked.

In yet other instances, board members reported receiving misinformation or feeling a lack of full and timely disclosure of financial difficulties. The roles of staff and board members often do not seem to be sanctioned, clarified, or communicated to one an-

other in a clear fashion. In a number of instances there seemed to be conflict over leadership styles.

At times, professionals see board members as engaging in micro-management and not in governance. Chait and Taylor (1988) confirmed that when a board moved from a major emphasis on governance to micro-management, this reflected a board's growing lack of trust in the staff. As a result, board members became involved in day-to-day oversight to assure the restoration of agency viability.

In the arena of governance, the legal obligations and responsibilities are in the hands of the volunteer leaders. Conventional wisdom had it that in the not-for-profit sector, board members set policy and staff implemented policy. However, over the years, as the not-for-profit organizations became more sophisticated, the demands on board and committee volunteers and staff became more complex, comprehensive, and demanding.

Sophisticated volunteers are increasingly drawn from sophisticated and successful profit centers, brought expectations for efficiency and effectiveness. Increasingly in community agencies, those who are involved in governance may not possess Jewish knowledge and values, while economic criteria loom ever larger for admission to board membership. Historically, the *parnass* has always been involved — *baal hamea hu baal hadea* — "whomever controls the resources controls the idea," but there were knowledgeable Jews also involved (Cohen 1984 and Elazar 1995).

In turn, staff are expected to be fiscal and personnel experts, knowledgeable about organizations, fund-raising, and diplomacy. They should be able to communicate clearly, write well, provide leadership to staff, and represent agencies in all manner of settings, Jewish and non-Jewish.

As budgets have risen and more dollars raised in Jewish life, the stakes have become even higher. The days when a Federation could focus primarily on local issues are gone. Even though allocated dollars for local needs are up, national and international issues still crowd the Federation agenda. The setting of priorities for time, energy, and resources is in itself an increasingly complex and difficult matter, requiring political skills and sensitivity far beyond what was envisioned in decades past.

Issues have become more complex and the arena for action and decision-making has taken on more global dimensions. A different kind of volunteer has appeared on the scene, one even more cosmopolitan, internationally-oriented, who is interested in being a part of the power game in Jewish life.

We have identified a number of issues as a result of this increasingly demanding world of non-profit governance. They are:

1. Power-sharing
2. The nature of the decision-making process
3. The tensions between governance and micro-management
4. The delineation of roles on a day-to-day basis
5. The roles of leaders as volunteers and staff

Power-Sharing

The roles of volunteers and staff intersect and interact, with no clear and consistent boundaries as to how decisions are made and how actions are taken. Old theories of governance in the not-for-profit sector stated that policies are made by board members who are volunteers, but the reality should be that no board president or committee chair should deal with policy issues without consulting with staff. Staff, in turn, often engage in cajoling, debating, influencing, informing, and otherwise shaping or redirecting policy. Both volunteer leaders and staff benefit greatly from an interactive process and, most importantly, so does the governance system. However, if the expectations of volunteers and staff are not clear regarding what is truly involved in decision-making at the policy level, problems await.

There is another, more complex, issue. Who speaks for the organization publicly? How is this decided? How are agendas formed? Who decides when priorities change? How does an executive use his or her power and when and how is it shared with others?

The Decision-Making Process

Jewish organizations decide major issues based upon the consensus model. The result is that debate is rarely public, and dissent and disputation are frowned upon. Board meetings are often pro forma, boring, and ultimately limited in their abilities to engage people in a serious way.

The culture of a given Jewish organization affects the level of involvement of people in meetings where decisions are really made. Who has responsibility for "managing" the process? Does staff encourage secrecy and closed meetings in order to "manage" the outcome, rather than help assure a process of decision-making that is open? Should it be so? Who changes matters?

The staff's greatest power is in the centralization and distribution of information. If agendas are first seen at a meeting, if minutes are first distributed at that time, if reports are first placed before board and committee members at the meeting, is decision-making enhanced or limited? What is the responsibility of staff and volunteers in opening the system to more reflective and responsible decision-making?

If and when decisions are made by the committees, they are sometimes changed uni-laterally before finding their way to the board. Are volunteers being manipulated? Are staff being manipulated?

The Tensions between Governance and Micro-Management

Research in other non-profit settings demonstrates that the most productive boards are those which spend a significant proportion of their time on long range goal-setting, monitoring, and evaluating those processes set into motion as a result of the pursuit of those goals.

Drucker (1990), Wood (1989), Chait and Taylor (1989) have highlighted the conse-quences of board members' overinvolvement in management rather than governance issues. The visionary functions associated with defining short-term and long-term goals and strategies should occupy a significant percentage of board meetings. If everyone is in the boiler room and no one is on the bridge, the ship may be making excellent time but may be headed entirely in the wrong direction.

How long will busy, talented, and successful people remain involved if there is nothing significant to engage them? New issues and concerns often call for new directions. An agency sensitive to these realities budgets time at board meetings in order to address both near-term realities and long-term possibilities. The successful agency must pro-vide opportunities for the board member's psychic compensation to far exceed the psy-chic pain associated with board membership. Otherwise, the board member will re-move himself or herself from that membership.

The greater the trust and congruence of vision between staff and volunteers, the less the volunteers will engage in micro-management, and vice versa. When board mem-bers spend a lot of time in second guessing staff, reviewing minutia of day-to-day work, either trust is low or there has been no functional clarification of the roles of staff and volunteers.

Examples of a lack of clarification of roles include the board member who insists on seeing telephone bills, excessive time spent on budget details at meetings, or, in the instance of some women's divisions, the time spent on invitation design or napkin color. In turn, in large systems, power-sharing is often a source of friction. Where there are regional offices or hierarchical systems, staff are often moved around unilaterally with little or no input from volunteers. Without a consultation process, resentment grows and trust diminishes.

Roles on a Day-to-Day Basis

Many agencies have opted for the business world as their model. The executives' titles reflect this decision. It is almost axiomatic that when the executive is called "president" and the volunteer chief is called "board chair," the agency is tipping toward the corporate model. Wider latitude is likely in giving power to the staff. This model emphasizes efficiency and hierarchical supervisory structures.

The warmth associated with a more informal and less structured approach is often lost. Staff on the highest level will have disproportionately high salaries and status. Staff at the lower and middle management level will often be seen as technocrats and not leaders. This can often become a source of friction. There is a need to clarify what volunteers expect of staff below the executive level and vice versa. Who initiates correspondence or writes speeches? How are agendas set? When a meeting takes place, who decides how ideas and programs are introduced?

What happens when volunteers do not follow through on assignments, e.g., phone calls, attending meetings as promised, covering cards for the fund-raising drive, etc.? What are the staff to do when they are assigned volunteer leaders who are not knowledgeable but see no need to be oriented (educated) to their roles and/or the roles of the committee?

Roles of Leaders as Volunteers and Staff

Both staff and volunteers often need the same knowledge, values, and skills. Both must know about Israel and the history, purpose, and roles of organized Jewry, as well as have communication, analytical, listening, and visionary skills and abilities. They should be Jewishly literate, and share a passion for the mission.

As a dual-driven system (by volunteers and by staff), agencies often reflect the tensions born of incomplete or uneven approaches how the leaders' roles are to be delineated. For example, who speaks to the press? When is it staff or volunteers? How are letters signed? Do they have both volunteer and staff signatures? Who represents the agency to which audiences and groups? How is it decided? Conventional wisdom at times has held that staff should be invisible. Is that position viable or functional in today's world?

As an example, conventionally in times past, Jewish organizations insisted on peer fund-raising, with volunteer leaders expected to solicit their peers. In reality, this is not always the case. Conversely, on telethon days, staff members rarely work the phones alongside the volunteers. Who decides these roles? Why? How? Some volunteers who expect staff to function only or mainly as technicians within Federations. Often unconscious resentments abound regarding staff who get paid to do what many volunteers do, and/or feel they could do without pay.

In truth, staff control of information and the timing of its distribution is only one of the main sources of power which staff possesses. Their knowledge of the given agency in which they work is another basis for differences of roles between staff and volunteers.

If anything, many board and committee members are more knowledgeable than their staff counterparts. Staff who err in not using the knowledge of volunteers are minimizing the productivity of the agency itself.

Methods

This study examines the attitudes and expectations of professional staff and volunteer board members about their relations. We sent questionnaires, pre-tested with focus groups of professionals and volunteers, to 2,000 people. The potential respondents, 1,400 of whom were volunteers, and the rest (600) professional, were randomly selected from an unduplicated list of 5,000 volunteer and professional leaders provided by the United Israel Appeal, United Jewish Appeal, Council of Jewish Federations, National Jewish Community Relations Advisory Council (now Jewish Council for Public Affairs), Association of Jewish Family Service Agencies, and the Jewish Community Center Association. Almost all questions were closed-ended, with a few open-ended questions. The mail-back survey was fielded by the A.B. Data Corporation of Milwaukee.

The questionnaires were sent out over a period of five months during late 1995 and the early part of 1996, in three waves. We administered the questionnaires by telephone to 100 respondents so as to ameliorate problems of sample bias connected with relying exclusively on the mail-back questionnaire.

We asked the respondents to report on all their communal and sub-executive affiliations and then to select their area of principal involvement. In light of the source of the names we sampled, it is not surprising that just over half (53 percent) regarded their Federation involvement as their primary Jewish communal commitment. As a consequence of their large number, we were able to treat the Federation-affiliated leaders separately from the rest. We also divided volunteers from professionals, who split 57 percent to 43 percent respectively.

Of the 2,000 people we contacted, 842 (42 percent) returned usable questionnaires. Limited analysis could detect no particular pattern to those who chose to respond, except that professionals were somewhat more likely to do so then volunteers. Of the usable respondents, 400 (48 percent) answered the open-ended questions.

Profile of Respondents: Volunteers versus Professionals

Volunteers are Older

To put some of these findings in perspective, it is useful to begin with the understanding that the volunteer leaders are considerably older than the professionals. Among Federation-related leaders, the mean age for volunteers is 59, as compared with just 46 among the professionals. For the other agencies, the gap is somewhat smaller: mean ages of 56 versus 48 respectively. Given the rising availability of Jewish educational opportunities over time, one would therefore expect the considerably younger professionals to report higher levels of Jewish education.

Professionals have More Jewish Education

We would expect professionals to exceed volunteers in terms of Jewish education, in part because Jewish educational elvels of both sorts of leaders have risen over the years, and because professionals are younger than volunteer leaders.

Indeed, we do find a gap in Jewish education levels between professionals and volunteers, but by far larger margins than age alone would account for. In every measure of Jewish education, the professionals lead the board members. More than twice as many professionals as volunteer leaders went to day school or yeshiva. While under half of the volunteers belonged to a Jewish or Zionist youth group, about two-thirds of the professionals did so. As youngsters, fewer than 20 percent of the volunteers had visited Israel as compared with more than twice as many professionals. About a quarter of the volunteer leaders had taken a Jewish studies course in college, but over half the professionals had done so.

While no definitive benchmark data are available, it seems that the Jewish education rates for the volunteer leaders are not all that different from other American Jews their age. The professionals, in contrast, report rates of childhood Jewish educational experience far in excess of the national rates.

With respect to Jewish educational experiences, professionals in Federations hardly differ from those in other agencies. However, among volunteers, those in Federations on many measures slightly trail their counterparts in other agencies.

Conservative Preponderance, Especially in Federations

Most Federation volunteer and professional leaders identify with the Conservative movement, about a third with Reform, and only 5 percent with Orthodoxy. Conservative affiliation also leads in other agencies, but not to the same extent. Here, just under half

are Conservative and over a third are Reform. Somewhat more of them than among Federation leaders are Orthodox (9 percent for the volunteer leaders and 12 percent among professionals). Noticeable by their relative absence are the non-denominational choices: in surveys of the Jewish public, this choice is associated with lower levels of involvement in Jewish life than are any of the explicit denominational choices.

In comparison with the American Jewish population, these leaders are far more prepared to declare a mainstream denominational affiliation. However, given their activism in Jewish life, it is somewhat surprising that the Orthodox do not pick up even a proportional share of the denominationally identified. With 8 percent of the American Jewish population at large, the Orthodox comprise about the same proportion of the leadership ranks of the organizations represented in our national sample. Their low representation may testify to the growing rift between Orthodoxy and non-Orthodoxy, with the Orthodox absenting themselves from multi-denominational contexts in Jewish life.

Above-Average Religious Practice

We included only two measures of religious practice in our survey, but both point in the same direction. Well more than half claim to attend religious services at least monthly and about two-thirds say that Sabbath candles are usually lit in their homes. Both these figures are more than triple the national averages. It is reasonable to assume that lay and professional leaders also perform other religious activities far more often than the American Jewish public.

Widespread Personal Attachment to Israel

In a variety of ways, leaders reported numerous instances of personal attachment to Israel. On three measures, the professionals sharply outpaced the volunteer leaders: the ability to conduct a simple conversation in Hebrew (almost half of the professionals versus less than one in five volunteer leaders); having lived in Israel for a year or more (a fifth of the professionals and just a few volunteers); and having considered at one point making aliya (over a quarter of the volunteer leaders and twice as many professionals). By any reasonable measure, these represent sizable levels of attachment to Israel.

The vast majority (86 percent) of Federation-affiliated leaders, whether volunteer or professional, have participated in a Mission to Israel, as compared with roughly two-thirds of those in other agencies. This is one of the few areas where Federation leaders differ from their counterparts elsewhere, and is certainly not surprising in light of the Federation leaders' involvement in fund-raising on behalf of Israel. About a third of American Jewish leaders were in Israel the previous year, with volunteer leaders having visited more than professionals, and those outside the Federation system having gone more than those within Federations.

Below-Average Levels of Intermarriage

About one in ten of these leaders are married to non-Jews, a figure that is about half the American average (about 20 percent of all adult Jews, older and younger, are married to non-Jews). Among their children, the rate of intermarriage reaches approximately 18 percent, with little variation between volunteer and professional leaders. This level is much lower than the American average for intermarriage of people their children's age, but is significant nonetheless. Considering that those who can report on grown children are older than others (implying a lower current rate of intermarriage), the rate may be seen to have more than doubled in a single generation.

Table 2

JEWISH IDENTITY OF AMERICAN JEWISH LEADERS
(Entries are percentages)

	Federation		Other	
	Vol.	Pro.	Vol.	Pro.
Mean Age	59	46	56	48
Jewish Upbringing/Education				
Raised as a Jew	94	96	94	96
Attended a day school or full-time yeshiva	5	13	5	14
Attended a 3-day-a-week religious school	51	59	51	55
Attended a 1-day-a-week religious school	39	31	29	28
Attended a Jewish educational camp	23	53	38	53
Belonged to a Jewish or Zionist youth group	49	72	45	63
Took at least one Jewish studies course at a university	21	57	34	53
Visited Israel before the age of 22	14	40	21	37
Denomination				
Orthodox	5	5	9	12
Conservative	54	59	49	45
Reform	35	26	39	33
Other	6	10	4	11
Religious Practice				
Attend synagogue services at least monthly	53	66	66	63
Sabbath candles usually lit in home	65	73	62	70
Israel Attachment				
Can conduct a simple conversation in Hebrew	22	45	17	43
Ever lived in Israel for a year or more	4	21	6	19
Ever considered making aliya	28	57	27	49
Visited Israel last year	30	21	48	34
Ever participated in a "Mission" to Israel	86	86	65	68
Any children ever spent 4 months or more in Israel	31	21	30	22
Intermarriage				
Intermarried	9	10	9	11
Parents of children intermarried	17	19	19	17
Number of cases	337	112	140	353

Main Findings

Perceived Competence — Doubts about the Volunteers

Among the issues we examined was the perceived competence of professionals and volunteer leaders. Volunteers and professionals had identical assessments of the professionals' competence, with 75 percent of both groups agreeing that professionals to a great extent are competent to perform their roles (Table 3). Both groups were also in almost identical agreement in concluding that, to a great extent, the attitudes and motivations of professionals in approaching their work were "appropriate" — 77 percent of professionals and 76 percent of volunteer leaders so concurred. In contrast, barely half of the volunteer leaders (52 percent) felt that they themselves did so to a great extent, and only 44 percent of professionals felt that this was the case. Also in contrast with the highly positive views of professionals, only 27 percent of professionals, and barely a third of volunteer leaders (34 percent), felt that board members were competent in knowing what they needed to know in order to perform their roles.

Table 3

EVALUATION OF PROFESSIONALS AND VOLUNTEERS
(in percentages)

| | "Yes, to a great extent" | |
	Professionals	Volunteers
Are the professionals competent in terms of what they need to know to perform their roles?	75	75
Are the volunteers competent in terms of what they need to know to perform their roles?	27	34
Do the professionals approach their roles with the proper attitudes and motivation?	77	76
Do the volunteers approach their roles with the proper attitudes and motivations?	44	52
Do the professionals readily share information with the volunteer leaders?	67	53
Do the volunteer leaders readily share information with the professionals?	49	68
The quality of professional leaders is excellent.	54	56
The quality of volunteer leaders is excellent.	35	38

To a great extent, then, professionals view themselves as being competent, a view confirmed by the volunteer leaders. In contrast, large majorities of both professionals and volunteer leaders conclude just the opposite when assessing the competence of volunteer leaders.

One expects to find differing points of view between professionals and volunteer leaders, and, indeed, such is the case in some of the findings in this study. However, the concurrence of both groups in a highly negative assessment regarding volunteers points to an unmistakable conclusion: Jewish communal volunteer leaders are often perceived as insufficiently competent for their roles. The reality may well correspond with perception.

Do Leaders Share Information?

The two groups of respondents differ when asked to assess leaders' readiness to share information. While fully two-thirds (67 percent) of professionals feel to a great extent that professionals readily share information, a bare majority (53 percent) of volunteers feel the same way. Slightly under half of the professionals (49 percent) and over two-thirds of the volunteers (68 percent) feel that volunteer leaders share information in a timely and useful way.

These findings regarding sharing of information are a sign of a potential point of tension. Two-thirds of professionals and volunteers feel that, to a great extent, their respective counterparts do not readily share information with one another. This mirror image of low trust regarding one of the most essential components of governance contains the seeds of future difficulty, if not outright conflict, between volunteers and staff.

Trust in itself is an essential element in any set of human relations. When it is missing in the governance process, its absence weakens sound organizational performance. If volunteer leaders suspect that there has not been full and timely disclosure of that which they need to know, their decision-making capability is seriously crippled. In turn, if professionals feel that volunteers are plotting or planning and are not involving them at appropriate times, then disastrous consequences for governance are almost assured.

It is important to note that the responses to our questions do not discern reality from feelings. The perception people hold of each other shapes both expectations and fulfillment. At the least, the answers bespeak the need to examine the reality of perceptions among both volunteers and professionals.

Lower Ratings of Volunteers — Additional Evidence

Some anomalies are also apparent. Similar majorities of professionals and volunteer leaders rate the quality of professional staff as excellent (54 percent of professionals and 56 percent of volunteers). At the same time, only 35 percent of professionals and 38 percent of volunteer leaders feel the quality of volunteer leaders is excellent.

One of the outcomes of this lukewarm assessment of volunteer leaders by both staff and volunteers is a clash between the two groups with regard to how they should work together. Only about a third of each group of respondents rated volunteer-professional relations as excellent (Table 4). Only 20 percent of professionals and 20 percent of volunteer leaders report a clarity of boundaries for their respective roles, to a great extent. Not only is this an area for possible conflict between the two groups, but less than a third agree that congruence between their shared visions exists to a great extent — 29 percent among volunteers and 26 percent among professionals.

This divergence becomes even more apparent when the responses of professionals and volunteer leaders to specific areas of responsibility are examined.

Table 4

THE PROFESSIONAL-VOLUNTEER RELATIONSHIP
(in percentages)

	% Excellent	
	Professionals	Volunteers
Volunteer-professional relations	33	36
Clarity of boundaries between the proper roles of professionals and volunteer leaders	20	20
Congruence between the visions of the volunteer and professional leaders	26	29

Who Plays Which Roles? — Agreement in Several Areas

We asked several questions on who should primarily undertake a variety of functions, volunteers or staff. In many cases, volunteers and staff responded in fairly similar fashions. Thus, 67 percent of volunteers feel that mostly volunteers should determine the agency's mission, while only a slight majority of professionals (54 percent) agree (Table 5). The two groups are closer when assigning degrees of responsibility for funding allocation and personnel decisions. Substantial majorities (75 percent of volunteers and 71 percent of professionals) agree that the matter of allocations is only or mostly the responsibility of the volunteers.

Conversely, only 27 percent of professionals and 29 percent of volunteers feel that only or mostly volunteers should set personnel policy. Thus, professionals seek, and volunteers expect, great input from professionals on matters relating to personnel; in like fashion, both groups agree that the great bulk of input regarding allocations should be in the hands of volunteers. Indeed, on matters relating to personnel, neither professionals nor volunteers expect volunteers to be active in hiring, evaluating, and firing staff below the executive level (2 percent of professionals and 5 percent of volunteer leaders).

The presumption as to who raises money has undergone radical changes over the years. As noted earlier, conventional wisdom for decades held that volunteer peers ask volunteer peers for their gifts. This meant that the primary role for professional fund-raisers was to work with the volunteer leader, identifying prospects, preparing appropriate data, but having the volunteer leader automatically ask for the gift.

This presumption is no longer the case. Only half of the professionals (exactly 50 percent) felt that that mostly volunteers should raise money, and a bit more than half (56 percent) of the volunteers agreed. Given the fact that fund-raising now includes grant proposals, intensive contacts with government entities, endowments funds, lawyers, estate planners and the like, it is easy to understand that the patterns of yesteryear do not necessarily fit today's realities, and neither do the "askers." Highly technical knowledge is needed for much of what is now called fiscal resource development. Relationships and knowledge are seen as important elements in the fund-raising process and both volunteers and staff seem to appreciate this to a greater degree than initial impressions often reflected.

Table 5

WHO'S RESPONSIBLE?
(in percentages)

	"Mostly volunteers should be responsible for"	
	Professionals	Volunteers
Determining the agency's mission	54	67
Deciding on allocations	71	75
Setting personnel policy	27	29
Hiring and firing personnel below the Executive Director	2	5
Raising money	50	56
Articulating a vision	10	26
Providing personal Jewish role models for the Jewish community	4	16
Building consensus	11	20

Leadership Roles — Points of Disagreement

Far more volunteers (26 percent) saw articulating a vision as being their domain than was the case among professionals, 10 percent of whom felt it was solely or mostly the function of the volunteer leadership.

A possibility for conflict is also evident, even if it is to lesser degree, when examining who has the main responsibility for providing personal Jewish role models for the Jewish community. Only 4 percent of professionals saw this function as solely or mainly a volunteer responsibility, while 16 percent of volunteers saw this as solely or mainly their responsibility. What is important here is that most see this as the task of both groups.

Nearly twice as many volunteer leaders as professionals (20 percent compared to 11 percent) saw volunteers as being the main or sole builders of consensus. In relation to the matter of planning, nearly three times as many volunteers as professionals (14 percent versus 5 percent) saw planning as being solely in the hands of the professionals. These figures, again, are small, but point out potential points of friction. Inferentially, they also speak to the difficulty inherent in a field where that which professionals are supposed to know as part of their professional competencies is not viewed in the same manner by some volunteer leaders.

Increasingly many graduate programs teach lay leaders the same skills and have a broad overlap with the graduate programs in which many Jewish communal professionals are educated. As a result, areas for potential role conflicts increase. A board member who is a vice president of human resources development in her corporation, or a chief fiscal officer, or a computer expert in his organization, must experience unusual tensions as a board member. Their familiarity with business plans, priority setting and strategic planning mean they are often more sophisticated than some staff members. These overlapping skills raise the possibility of conflict in the non-profit-organization setting as to who should have primary responsibility, and who is seen as having the most competencies in the area of planning.

Policy Formulation and Implementation

Both professionals and volunteers were in unusually high agreement regarding the need for efficiency and effectiveness. Almost all (92 percent of professionals and 91 percent of volunteers) agreed that Jewish agencies should be run with those two goals in mind (Table 6). At the same time, a considerable minority of both professionals (42 percent) and volunteers (39 percent) felt that a Jewish communal agency should be run very differently from a profit-making operation.

The classic model of "volunteer driven and staff managed" agencies (the model now used by Hadassah and long a model in many other agencies) is agreed to by a bare majority of professionals (51 percent), while 68 percent of volunteer leaders agreed to the view that volunteers make policy and professionals should carry it out. Staff members who feel they should have a major input into policy formulation run the risk of being the object of volunteer frustration and anger, given the fact that a majority of volunteers feel differently. Nevertheless, the dynamics and increasingly complex nature of governance in Jewish life does blur the lines between the input of professionals and volunteer leaders in policy formulation.

In some settings, especially those of universities and hospitals, the professional CEO holds the title of president. In many such instances he or she is a board member who can vote. The role of the professional in that case will be different than in Jewish communal life. The increasing use of the title of "president" for CEOs in Jewish communal settings, as compared to the other terms used in the field, is emblematic of the flux in expectations of top professional and volunteer leaders. A century ago the common term was "secretary," which then was changed to "executive director" or "executive vice-president."

In today's reality, more and more board members are involved in implementing policy decisions. As noted earlier, Federations, JCCs, and CRCs increasingly are involved in issues which call for intense and extensive volunteer involvement. This is especially the case when the Jewish community tries to influence legislators and members of the executive branches of local, county, state, and national governments, while conforming with limits on lobbying as a function of non-profit organizations. We are dealing with an increasingly complex world requiring increasingly complex responses to problem-solving, finding adequate resources, delivering services, affecting public policy decisions, and relating to government entities and bureaucracies, to name a few of these forces.

Table 6

HOW SHOULD THE AGENCY BE RUN?
(in percentages)

	Professionals	Volunteers
Jewish agencies should be run like a good business, with high standards of efficiency and effectiveness.	92	91
A Jewish communal agency should be run very differently from a profit-making operation.	42	39
Volunteer leaders should make policy and the professionals should carry it out.	51	68

Who's in Charge? Not the Professionals, Most Agree

The survey asked a cluster of questions to ascertain the degree to which professionals were perceived as running the agency. Not many professionals or volunteer leaders viewed these issues as significant. Only 13 percent of professionals and 18 percent of volunteer leaders perceived professionals acting as if they owned the organizations, while 3 percent of the professionals and 9 percent of the volunteer leaders felt that professionals had too much power. However, a number of other questions revealed some substantive points of potential conflict between professional and volunteer leaders.

Table 7

WHO'S IN CHARGE?
(in percentages)

	% Agree	
	Professionals	Volunteers
Professionals act as if they – rather than the volunteer community – own the organization.	13	18
In general, professionals have too much power.	3	9
Given that they're working for a Jewish charitable agency, some professionals here are significantly overpaid for what they do.	6	14
Volunteer leaders treat professionals in a demeaning fashion.	22	13
In general, volunteer leaders have too much power.	14	5
The agency is really run by the professionals, not by the volunteer leaders.	36	35
Most of the important decisions in the agency are made by the volunteer leaders and not by professionals.	42	45
Volunteer leaders let their egos get in the way of exercising high quality leadership.	43	36
Professionals work to manipulate volunteer leaders.	24	31
Volunteer leaders try to micro-manage rather than let the professionals do their job.	34	28
The top professionals here could easily be fired on a moment's notice.	21	5
The agency's top executive resigned under pressure or was dismissed during the last three years.	16	17
Large contributors have too much power in decision-making.	32	31

Pay and Power

The results point to significant minorities who attest to one or another specific area of tension or conflict. While in each area, minorities — sometimes small minorities — report signs of difficulty, in cumulative fasions, almost all report at least one significant problem or complaint.

The anecdotal discussion regarding salaries in the field suggests that many volunteer leaders feel that senior professionals are overpaid. Numerous professionals have noted resentment regarding their own pay, with many reporting hostility and irritation about others' high salaries. We found no such negative ground-swell. Few volunteers feel professionals are being overpaid. Indeed, only 14 percent felt that was the case and just 6 percent of the professionals agreed with them.

The survey also explored the use of power and the roles of volunteer leaders in micro-managing. Over a fifth of professionals (22 percent) agreed that volunteers treat professionals in a demeaning fashion, a view also held by 13 percent of the volunteers.

More professionals than volunteers felt that volunteers had too much power — 14 percent of the professionals compared to 5 percent of the volunteers. At the same time, more than a third of both groups (36 percent of professionals and 35 percent of volunteers) felt the agency in which they served was really run by professionals, not volunteer leaders.

Yet both groups also had substantial minorities who agreed that most of the important decisions in the agency were made by volunteers and not by the professionals. As many as 42 percent of the professionals and 45 percent of the volunteer leaders agreed with that proposition. A substantial number of professionals also felt that volunteer leaders let their egos get in the way of exercising high quality leadership (43 percent), and 36 percent of the volunteer leaders agreed with the professionals' assessment.

Nearly a quarter (24 percent) of professionals and 31 percent of volunteer leaders agreed that professionals tend to manipulate volunteer leaders. The significant minority opinion on this question indicates great potential for conflict.

One-third of professionals (34 percent) and over a quarter (28 percent) of volunteer leaders felt that volunteer leaders try to micro-manage the agency instead of letting professionals do their jobs.

The combination of responses to this cluster of questions has some confusing and conflicting patterns. At the least, the ways in which power is shared, responsibilities are identified and executed, and roles clarified in the areas touched upon represent an inevitable minefield of potential conflict. Questions arise: Do professionals and volun-

teer leaders share their opinions on these issues with each other? How does one measure the legitimacy of the aspirations and expectations each group has for the other? How much do these unshared assessments of each other affect trust in the governance process and the respective expectations each has of the other in that process?

To say the least, the relationships between board and staff members are very fluid. It should prove comforting to the staff person reading this study that staff members generally are seen in a very positive light. There are, however, warning signs regarding the perception of a minority of volunteers regarding the extent to which professionals are perceived as having too much power or involved in manipulating board members.

In turn, the issue of micro-management, while not viewed as a problem by the majority of respondents, is a volatile issue engaging the concern of sizable minorities. In that regard, the self-perceived vulnerability of professionals may be at work in affecting the degree to which professionals are open with volunteer leaders. While only 5 percent of volunteer leaders agree that top professionals could be fired at a moment's notice, 21 percent of the professionals felt that was the case. This possibility is underscored when 16 percent of professionals and 17 percent of the volunteer leaders report that within the last three years their agency's top executive resigned under pressure or was dismissed.

Even though the great majority of volunteer leaders did not feel executives were overpaid, it is known that executive salaries today are quite comfortable. Indeed, the figures speak for themselves. The JCC Association provided data regarding the salary range of the upper echelon staff in Jewish community centers, while CJF did the same for their settings (with the exception of the salaries of executives in the 19 largest cities). The figures do not reflect fringe benefits which, in turn, can cover medical plans, retirement funding, expense accounts, car and, in some rare instances, home allowances (JCCA 1997).

CEOs in Federations (excluding the largest 19 cities) have median salaries of $90,000 exclusive of fringe benefits while CEOs in JCCs have median salaries of $92,500 (exclusive of fringe benefits) including all executives' salaries in the country.

The range for Federation directors' salaries (exclusive of the 19 largest cities) was from $31,600 to $153,000, while in all JCCs the range was from $40,000 to $187,000 (CJF 1997).

Are executives fearful of losing their jobs if they take on roles in their agencies which may be unpopular? Obviously, most executives did not feel this way. We have no prior study to refer to in order to measure any change. The fact remains that the cluster of questions at the least confirmed a murkiness of respective roles and bespeaks the need for more clarification regarding mutual expectations.

Hovering over the governance process is the issue of the power of the giving elite. The fund-raising approach in Federations is essentially elitist in that it concentrates on the few (5-20 percent depending on the city) who are responsible for giving 70-90 percent of the money in a given annual drive. Many suggest that they have a right to dispro-portionate input in the governance process as a result. Yet others, often critics of the Federation system as a whole, feel major contributors should have no more influence than anyone else in the governance process.

While the great majority of both professionals and volunteer leaders do not agree that large contributors have too much power in decision-making, 32 percent of professionals and 31 percent of volunteer leaders did agree.

It would be naive to conclude that major donors should not have significant input as to how their money should be spent. All involved in community work are acutely aware that fund-raising today takes place in a voluntary world. The potential donor decides whether to support a cause. The remarkable reality in the Jewish world seems to be how relatively disciplined major donors are in allowing or encouraging a well-planned allocation process to unfold in most cities, with high trust on their part that the planning priorities will do no violence to their own priorities.

Scenarios, Attributes, and Values

In our questionnaire we provided an option for respondents to describe a conflict situa-tion between board and staff people, and to indicate how the issue was resolved. They were then asked to list three attributes and skills admired most in both volunteers and professionals, followed by a request to list three attributes or weaknesses least admired in both volunteers and professionals. The last two questions asked respondents to name the Jewish communal professionals and Jewish communal volunteers who had most impressed them.

Nearly 50 percent (410) took the time to fill out all or part of this final section, in the same proportions of board and staff as had responded to the quantitative section. Of the respondents, 97 (24 percent) described conflict situations which had arisen be-tween professionals and board members, but 13 proved to be too vague for classifica-tion. The remaining responses (84) were clustered in almost equal proportion around four issues:

1. Power, control and communication issues	22
2. Unhappiness with professionals' performance	21
3. Issues related to role differentiation and volunteer micro-management	21
4. Decision-making processes	20

The remaining 13 were concerned with personality issues, volunteer-volunteer con-flicts, disagreements regarding priorities, and job description discrepancies. Only one related to gender.

Skills, Strengths and Positive Attributes

Professionals and volunteers listed skills, strengths, and positive attributes with similar patterns of responses. They had the same sets of expectations and disappointments and there was no discernible double standard in their responses. Nearly 90 percent of the responses clustered around what we have called people and leadership skills. The balance were related to values.

What follows are the most frequently mentioned words or phrases describing the attitudes and values most admired, with the response frequency noted in descending order of frequency. The responses exceed the number of respondents because multiple answers were encouraged.

1. Commitment, passion, dedication, generosity	76
2. Listening and consensus-building skills	65
3. Visionary with communal orientation	59
4. Reliability for follow through	55
5. Honesty and integrity	48
6. Jewish values, knowledge and observance, concern for Israel	39
7. Knowledge of issues	22
8. Organizational management and budgeting skills	14

While many in number, all the other responses had few clustered responses but were related to personality. Such words as modest, diplomatic, practical, accessible, and patient were listed, but each attribute was noted four or fewer times.

Respondents were also asked to list attributes or weaknesses least admired in volunteer and professional leaders. In all, 587 responded to this optional question.

Responses clustered around a number of concerns which are listed in descending order of frequency:

1. Lack of leadership skills	110
2. Ego and self-centeredness	104
3. Laziness, procrastinator	69
4. Poor management skills	65
5. Unethical behavior	50
6. Personality issues (abrasive, insensitive, insulting, etc)	41
7. Lack of vision	35
8. Lack of general knowledge	15
9. Lack of Jewish knowledge and commitment	7

At a time when concerns for positive Jewish experiences and Jewish continuity are high on the Jewish community agenda, few board and staff members mentioned them in

their answers. Their importance was noted 39 times as compared to 235 listings of leadership and people skills as being of high importance. Conversely, on the negative side, poor leadership and people skills were mentioned 110 times, while concern about lack of Jewish commitment was mentioned only 7 times.

At present, a number of national or international organizations are spending much time and talent to help train volunteer leaders, with a focus on Jewish issues and concerns. In these very fine programs, many rarely seem to expend much energy or time to the application of Jewish commitment and knowledge in communal settings. Somewhere the bridge from text to board room seems to be missing. As a result, the connection between Jewish life and values and their usefulness in the governance process is not apparent in increasing application to the board and staff governance processes.

Professional and Volunteer Leaders of Great Influence

We asked respondents to list the one professional and the one volunteer leader who had most impressed them collectively. They listed the names of 170 different professionals and 155 volunteer leaders. In the case of the professionals, 35 names were each mentioned six times, two were mentioned five times, and six were mentioned three times. Of the volunteer leaders, only two were mentioned more than three times — the first one twenty times and the second nine times. Sixteen were mentioned two or three times. Of those mentioned in both lists, fourteen were deceased.

By far, the greatest percentage of names of both professionals and volunteer leaders were active locally, not nationally. Compared to times past when a handful of national icons were identified as national leaders, the national list today is short and not widely recognized. The respondents, themselves active on the national and international scene, did not agree on a list of national leaders, whether staff or volunteers. At the least, this study demonstrates the need for caution regarding the notion that there is consensus among the most knowledgeable and active Jews within organizational Jewish life as to who are the national leaders. We conclude that as with life in America, where all politics is local, there are dozens and dozens of people, professional and volunteers, who are seen by their peers as impressive as they play out their leadership roles locally.

Conclusions

Our findings confirm many strengths and positive attributes in the arena of volunteer-staff relations. The two groups agree with respect to their respective roles as staff and volunteer leaders in dealing with staff below the executive level. The classic model of the executive having the authority to evaluate, hire and fire staff is confirmed. Most professionals and volunteers see themselves as sharing the responsibility for providing

personal Jewish role models for the community, even though more is expected of the volunteer than the professional in this regard.

Most volunteer leaders and professionals feel that articulating a vision and building a consensus are shared responsibilities, although volunteers feel these are more their responsibility. Planning is also seen as a shared function, even though, as noted previously, there is a potential source of tension here since more professionals view this as their sole bailiwick than do volunteers.

There is very high congruence between volunteer leaders and staff in assessing the competencies, attitudes, and motivations of professionals in job performance. The qualities of professionals are seen very positively by the majority of both volunteer leaders and professionals, even though the proportion is somewhat less when both groups assess competence among staff.

Board members are not as generous in rating themselves, with a significant percentage labeling their volunteer colleagues in negative terms vis-a-vis their competencies and how they are applied. Staff have even stronger opinions and are quite strong in the degree to which they feel that volunteer leaders neither possess nor demonstrate the requisite competencies needed as board members.

Almost all professionals and volunteer leaders agreed that agencies should be run with high standards of effectiveness and efficiency. There was also fairly highly agreement on a shared role for fund-raising, even as we noted some potential conflict in this area between staff and board members.

Our findings show that volunteers respect professionals to a greater degree than professionals feel is the case.

There is high congruence between the two groups in concluding that the allocations process is primarily a volunteer function, with staff expected to provide appropriate and useful data and assistance.

There is high congruence as to the values, attitudes, and human strengths which are most admired by both volunteer and professional leaders. Expectations and hopes are thus close to one another. This seems to confirm the shared aspirations and models for volunteer leaders and professionals.

What Staff Should Learn from This Study

Volunteers want their time to be used efficiently and want to be treated seriously. Their complaints suggest the need for staff sensitivity to these two expectations. Volunteers will resent any attempt to manipulate them by not providing them information in a useful time frame and a helpful form.

Staff's greatest power is perceived as being their access to information which volunteer leaders often feel is kept from them. The perception may be untrue or at the least, as our findings show, staff feel it is untrue, but perceptions come to have their own reality, so these (mis)perceptions have to be dealt with.

While volunteers view staff as competent, they do not feel there are a great number of them who are truly leaders. Open and honest communication is admired and hoped for but not always expected or received. Consequently, levels of trust are often not as high as one might hope would be the case. Successful volunteer-staff relations are born of good communications, which not only encompasses but transcends the printed word alone.

The findings clearly underscore that both board members and staff feel the other withholds information from the other. It is also clear that even though staff are seen as more competent in what they do than is the case for board members, the trust between staff and board is not at a high level.

Staff must remain conscious of the power they possess in affecting the process of governance by virtue of what they know and when they decide to share what they now.

Tropman (1980) has developed a formula for the notification of meetings and sharing of agendas and appropriate materials. He suggests appropriate time frames utilizing the rule of halves, three-quarters, and thirds. The rule of halves recommends that "no item be entered upon the agenda unless it has been given to the (persons involved) one half of the time between meetings....People coming to a meeting should know in advance items on the agenda....Some items require preparation, data gathering, and study in advance."

He goes on to explain that "[t]he rule of three-quarters...requires that at the three-quarter point between meetings, the agenda [should be] distributed along with any material required for effective preparation [by the board member for the meeting]...involv[ing] an agenda and minutes...[with] reports...to be discussed at the meeting."

The rule of thirds has two parts. Important business "should be handled as much as possible within the middle third of the meeting." For longer meetings Tropman suggests that there be a break at the two-thirds point to allow those who wish to, to leave.

As staff members aspire to be ever more involved in policy-making processes, they must do a better job in clarifying why they have a "right" to do so. In reality, these processes are interactive and interdependent.

Staff thus teach and touch as they perform their roles. They teach by example, by articulating issues and concerns, by exhorting and analyzing, by advocating and summa-

rizing, by synthesizing and bridge-building. They are knowledgeable and sensitive while being able to take the heat in the kitchen of organized Jewish life. They must be visionaries and technicians, risk-takers and bridge-builders, all at once.

This perhaps frightening job description is manifest in the lives of hundreds of staff members. This mix of craft and art, skill and vision, makes for the best of what volunteers hope to have in their staff.

It is not clear that all the attributes and desired dimensions listed here can be learned easily or at all. It is clear that staff can and do grow. They must be nourished by the environments in which they work, but most of all they must nourish themselves. In great volunteer-staff relations, the volunteer leaders have much to teach staff and smart staffs take advantage and learn through these relationships.

What Volunteers Should Learn from This Study

The best of agencies and organizations give opportunities for pleasure — the pleasure of personal growth together with the pleasure of seeing an organization fulfill its mission. The power of strong and purposeful volunteer-staff relationships fuels agency growth, even as it contributes to the personal growth of volunteer leadership.

Those relationships must be grounded in mutual respect and honesty. There is often a latent fear that the full disclosure needed in a successful relationship is not forthcoming. If this is the case, it can lead to dire consequences. Volunteers must re-ratify their willingness to be criticized by staff and indicate their openness to change.

There must be a sensitivity about the human dimension of the enterprise. Staff members are human, have private lives, and need recognition and encouragement.

The greater the clarity of mutual expectations, the greater the measure of mutual respect and output. Staff members must work simultaneously with many different volunteer leaders, each with his or her set of expectations, leadership styles, time constraints, and motivations. Volunteers' appreciation of this challenging reality will help intensify a productive relationship with staff.

Just as staff members ultimately have to remember that they are employees, so must volunteer leaders. That means that at times a seemingly irrational vulnerability may be at work. If, in turn, volunteers want staff members to be leaders and teachers, they must give them the right to fail without great obverse consequences.

Communal professionals have chosen a career course grounded in the desire to serve the Jewish people. The study confirms their relatively strong Jewish backgrounds. This circumstance is not accidental, for a career in Jewish communal service is obviously

seen for many as a logical outcome of the staff's life experiences. Volunteer leadership should celebrate this outcome. It is time to be happy that this career path is a good job for a Jewish "boy or girl."

The challenge to volunteer leaders of finding and keeping good staff calls for ongoing education and training opportunities. We have confirmed that this is the case for both staff and volunteer leadership. Intensified efforts are indicated and should be further evolved than is presently the case.

With all that, we also confirmed many areas and much evidence of good relations between board and staff. The overall picture is a good one, with much by the way of demonstrably shared values, visions, and commitment to Jewish life, yet there is much to do. Rarely has there been the need for clarity as to governance and its place and importance in Jewish life. Rarely have we needed leaders with wisdom and abilities as we do today. Both board and staff must recognize that the nature of Jews' attitudes, values and sense of communal involvement and responsibility is changing.
Various responses to governance continue to require serious engagement and commitment from the wealthy while engaging in community building. It is too early to conclude whether Jewish organizations will be able to fulfill the community's needs to serve and engage the elite as well as the general public. New times call for much more coalition-building and outreach with the organizations and agencies that actually are serving and teaching Jews wherever they live.

* * *

This study's findings must be read and applied in the context of the changing challenges facing Jews in the twenty-first century. The boards and staffs need to work together to help achieve the enormous transition from being primarily driven by the need to rescue, renew, and rehabilitate Jews to confronting the possibilities of living in a mostly open world and choosing to remain Jews out of choice. We stand ready to help move the base of knowledge into the arena of practice.

Bibliography

Bubis, Gerald and Dauber, Jack, *Building for the Nineties: New Dimensions for Lay-Staff Relations*. Los Angeles: Hebrew Union College, 1985.

-----, "The Delicate Balance; Board-Staff Relations," *Journal of Jewish Communal Service* (Spring 1987).

Chait, Richard and Taylor, Barbara, "Charting the Territory of Non-Profit Boards, *Harvard Business Review* (Jan-Feb 1989).

Cohen, Stuart, "The Concept of the Three Ketarim," *American Jewish Sociological Review*, vol. ix, no. 1 (Spring 1984).

Conrad, William and Glenn, William, *The Effective Voluntary Board of Directors*. Athens, Ohio: Swallow Press, 1983.

Council of Jewish Federations Salary Data. CJF, 1997 (faxed).

Drucker, Peter, "People and Relationships, Your Staff, Your Board, Your Voluneers, Your Community," *Managing the Non-Profit Organization*. New York: Harper Collins, 1990.

-----. "Lessons for Non-Profit Governance," *Non-Profit Management and Leadership*, Jossey Bass, vol. 1. no. 1 (Fall 1990).

Elazar, Daniel J., *Community and Polity*. Philadelphia: Jewish Publication Society, 1995.

Elazar, Daniel J., *Kinship and Consent*. New Brunswick, NJ: Transaction, 1997.

----- and Cohen, Stuart A., *The Jewish Polity: Jewish Political Organization from Biblical Times to the Present*. Bloomington: Indiana University Press, 1985.

Jewish Community Centers Association Salary Data. JCCA 1997 (faxed).

Kidneigh, John. University of Minnesota course notes of Gerald Bubis, unpublished, 1948.

Kramer, Ralph M., "Toward a Contingency Model of Board-Executive Relations," *Administration in Social Work*, vol. 9, no. 3 (Fall 1985).

Teller, Gerald, "The Jewish Community — A Partnership or a Corporation?," *Journal of Jewish Communal Service*, vol. 71, no. 2/3 (1995).

Tropman, John, *Effective Meetings*. Beverly Hills, CA: Sage Publications, 1980.
Wertheimer, Jack, "Current Trends in American Jewish Philanthropy," *American Jewish Year Book 1997*. New York: American Jewish Committee, 1997, pp. 3-92.

Wood, Miriam, "The Governing Board's Existential Quandary: An Empirical Analysis of Board Behavior in the Charitable Sector," Working Paper 143 and I.S.P.S.W. paper no. 2143, *Institute for Social and Political Studies*, Yale University, New Haven (February 1989).

Appendix

THE 1996 AMERICAN JEWISH LEADERSHIP SURVEY RESULTS

(in percent)

Is your role in the Jewish community life primarily as:

A VOLUNTEER (V) – 53   A PROFESSIONAL (P) – 47

YOUR PRIOR JEWISH COMMUNAL LEADERSHIP INVOLVEMENT

Have you *ever* served on the board of each of the following types of organizations?

	V	P
	(Yes)	
1. Synagogue	69	43
2. Jewish School or BJE	38	16
3. Jewish Family Service	29	6
4.Other Jewish social service agency	51	20
5. Federation	97	22
6. JCRC or defense agency	33	10
7. Jewish Community Center	49	13
8. National Jewish organization board of directors	52	25
9. Other	36	27

WHO'S RESPONSIBLE? LAY PEOPLE, PROFESSIONALS, OR BOTH?

Listed below are several functions performed by Jewish organization leaders, be they lay, professional, or both. In the ideal world, to what extent should lay leaders or professionals be responsible for each of these functions?

This responsibility should be ...

		Only Lay People	Mostly Lay People	Both Equally	Mostly Professionals	Only Professionals
Determining the agency's mission	V	13	55	31	1	0
	P	7	47	45	2	0
Setting major policy guidelines	V	12	58	28	2	0
	P	9	51	36	3	1
Deciding on allocations	V	21	54	24	1	0
	P	18	54	24	4	0
Setting personnel policy	V	8	21	31	38	2
	P	6	22	27	40	6
Evaluating personnel below the Executive Director	V	1	3	13	56	27
	P	1	1	4	34	60

		Only Lay People	Mostly Lay People	Both Equally	Mostly Pro-fessionals	Only Pro-fessionals
Hiring and firing personnel below	V	1	3	7	47	42
the Executive Director	P	1	1	1	27	70
Providing personal Jewish role	V	2	15	82	2	0
models for the Jewish community	P	1	3	96	1	0
Raising money	V	3	55	41	1	0
	P	1	50	48	1	0
Articulating a vision	V	3	24	68	5	0
	P	1	9	77	12	0
Building consensus	V	2	18	76	4	0
	P	0	11	80	10	0
Planning	V	1	14	74	12	0
	P	0	5	68	27	0
Managing	V	1	3	21	64	11
	P	0	1	8	61	31

THE CURRENT REALITY IN LAY-PROFESSIONAL RELATIONS

At your agency (the one with which you are now most involved),
to what extent ...

		To a Great Extent	Somewhat	A Little	Not at All
Are the professionals competent in terms of what they	V	78	21	2	0
need to know to perform their roles?	P	77	21	1	1
Do the professionals approach their roles with the	V	79	19	2	0
proper attitudes and motivation?	P	79	19	2	1
Do the professionals readily share information with	V	56	37	7	0
the lay leaders?	P	68	26	5	1
Do the professionals respect the lay leaders?	V	64	31	4	0
	P	56	38	5	0
Do the professionals ignore the proper instructions	V	4	16	41	39
of the lay leaders?	P	2	8	31	60
Are the lay leaders competent in terms of what they	V	35	57	7	0
need to know to perform their roles?	P	28	54	16	3
Do the lay leaders approach their role with the	V	53	42	4	0
proper attitudes and motivation?	P	46	40	13	1
Do the lay leaders readily share information with	V	71	28	2	0
the professionals?	P	50	39	10	1
Do the lay leaders respect the professionals?	V	61	35	3	1
	P	52	36	10	1
Do the lay leaders ignore the sound advice of the	V	1	17	49	34
professionals?	P	5	27	46	22
Are board and executive committee meetings	V	16	29	27	28
essentially meaningless, because the real	P	13	25	32	30
decisions have been made before the meetings?					

Overall, how would you rate the following in the organization in which you are most active?

		Excellent	Good	Fair	Poor
The quality of professional leaders	V	58	34	7	1
	P	56	40	4	1
The quality of lay leaders	V	39	48	11	1
	P	35	44	18	2
Lay-professional relations	V	38	52	9	1
	P	34	50	13	3
Clarity of boundaries between the proper roles	V	21	53	21	5
of professionals and lay leaders	P	20	46	26	7
The congruence between the visions of	V	30	51	16	2
the lay and professional leaders	P	27	51	17	5

		Yes
During the last three years, did your agency's top executive resign under pressure (or dismissed)?	V	17
	P	16

CRITICAL QUESTIONS

With respect to lay and professional leadership in *your agency*, do you agree or disagree with each of the following statements?

		Strongly Agree	Agree	Disagree	Strongly Disagree	Not Sure
Jewish agencies should be run like a good business,	V	53	42	0	1	4
with high standards of efficiency and effectiveness	P	49	47	1	1	3
A Jewish communal agency should be run very	V	8	33	13	2	44
differently from a profit-making operation	P	9	35	12	4	41
Lay leaders should make the policy and the	V	21	51	4	2	23
professionals should carry them out	P	9	44	14	3	31
Professionals should subordinate their own	V	7	46	5	5	37
visions to those of the agency	P	3	34	14	4	44
Professionals act as if they — rather than the	V	4	14	27	5	51
lay community — own the organization	P	1	12	35	1	52
Professionals don't take the lay leaders	V	1	10	37	3	49
very seriously	P	0	6	46	0	47
Professionals work to manipulate lay leaders	V	5	27	24	5	38
	P	1	24	35	1	39
Given that they're working for a Jewish charitable	V	3	12	31	4	51
agency, some professionals here are significantly overpaid for what they do	P	2	4	66	2	27
Lay leaders should subordinate their own visions	V	4	38	14	3	40
to those of the organization	P	3	37	12	4	44
Lay leaders try to micro-manage rather than let	V	2	27	16	4	52
the professionals do their job	P	6	29	17	3	46
Lay leaders let their egos get in the way of	V	7	30	11	7	45
exercising high quality leadership	P	9	34	9	3	45
Lay leaders treat professionals in a demeaning	V	2	11	36	1	49
fashion	P	6	17	29	3	46

		Strongly Agree	Agree	Disagree	Strongly Disagree	Not Sure
The top professionals here could easily be fired	V	1	4	50	3	42
on a moment's notice	P	5	17	28	4	48
In general, the lay leaders have too much power	V	1	5	23	2	70
	P	3	11	24	2	60
The agency is really run by the professionals,	V	4	32	12	4	48
not by the lay leaders	P	3	33	11	2	51
Most of the important decisions in the agency	V	4	43	7	4	42
are made by lay leaders and not by professionals	P	5	38	8	3	47
Large contributors have too much power in	V	8	25	13	3	51
decision-making	P	9	24	12	4	53

THE FEDERATION DOLLAR

In your own community, as compared with the present division of funds, would you want to see more Federation dollars devoted to the local needs, or more devoted to overseas (largely Israel-oriented) needs?

	V	P
Much more locally	19	19
Somewhat more locally	38	41
Keep the local/overseas split the same as now	32	29
Somewhat more overseas	9	9
Much more overseas	2	1

Listed below are three broad areas that Federation funds support. To what extent do you find each of these areas attractive as a recipient of Federation support?

		Very	Somewhat	A Little	Not at All
Israel and other overseas needs	V	62	32	6	0
	P	56	33	11	1
Jewish education	V	76	18	6	0
	P	72	22	6	1
Jewish social and human services	V	78	20	2	0
	P	75	23	2	0

Now, to the best of your knowledge, if Federation had to cut its funding in any of the following areas, how difficult would it be for the agencies in each area to find substantial replacement funding?

		Not Too Difficult	Somewhat Difficult	Very Difficult	Nearly Impossible
Israel and other overseas needs	V	13	49	31	7
	P	17	48	29	6
Jewish education	V	11	37	45	8
	P	7	34	48	11
Jewish social and human services	V	8	31	48	13
	P	4	30	50	17

Assuming a flat campaign, over the next several years, do you think the proportion of your Federation's funding to each of these areas should increase, decrease, or stay the same?

		Increase	Stay the Same	Decrease
Israel and other overseas needs	V	5	44	51
	P	5	40	55
Jewish education	V	40	52	8
	P	47	48	6
Jewish social and human services	V	37	54	9
	P	44	49	7

With respect to the Jewish community's efforts to ensure Jewish continuity, in your view, which group should be the primary target?

V	P	
11	9	Active Jews (the most active 1/4 of the Jewish population)
75	80	Affiliated, but not very active Jews (the middle of the population)
13	10	Unaffiliated Jews (the least affiliated 1/4 of the population)

YOUR BACKGROUND

Now we want to know a bit about you.

	V	P
	(Yes)	
Were you raised as a Jew?	94	96
Did you attend a 3-day-a-week religious school as a youngster?	51	56
Did you attend 1-day-a-week religious school as a youngster?	36	29
Did you attend a day school or full-time yeshiva?	5	14
Did you attend a Jewish secular or Yiddish school?	3	6
Did you attend at least one of the following: Camp Ramah, a UAHC camp, a JCC camp, an Orthodox camp, or one sponsored by a Zionist movement?	31	53
Did you belong to a Jewish or Zionist youth group?	48	66
Did you ever take a Jewish studies course at a university?	24	55
Before the age of 22, did you ever visit Israel?	16	38
Have you ever lived in Israel for a year or more?	4	20
Can you conduct a simple conversation in Hebrew?	19	43
Have you ever considered making aliyah?	28	52
Do you attend synagogue service once a month or more?	57	64
Are Sabbath candles usually lit in your home?	64	71
(If married) Is your spouse now Jewish?	91	89
Have any of your children ever spent 4 months or more in Israel?	31	22
Are any of your children now living in Israel?	4	2
Have you ever participated on a "Mission" to Israel?	80	74

How many of your children are currently married?

# Children	V	P
0	28	69
1	22	18
2	24	8
3	20	4
4+	7	2

Of these, how many are married to Jews (both born-Jews or converted)?

# Children	V	P
0	8	20
1	33	49
2	37	16
3	17	12
4+	5	3

You are:

	V	P
Male	62	56
Female	38	44

You are:

	V	P
Orthodox	6	10
Conservative	53	49
Reform	36	31
Secular	2	5
Other	4	5

If you were an Israeli voting in the last election for Prime Minister, do you think you would have voted for Bibi Netanyahu or Shimon Peres?

	V	P
Netanyahu	19	14
Peres	71	71
Not Sure	8	11
Don't know enough to make a good judgment	3	4

How much did you and your household contribute to the UJA/Federation in 1995?

	V	P
Under $1,000	7	25
$1,000-$4,999	24	54
$5,000-$9,999	17	15
$10,000-$24,999	23	5
$25,000-$49,999	13	1
$50,000 and over	15	1

You usually think of yourself as a:

	V	P
Republican	15	4
Democrat	67	82
Independent	19	14

Your usual stand on political issues is:

	V	P
Liberal	45	58
Middle-of-the-road	46	39
Conservative	9	3

Your household income:

	V	P
Under $50,000	3	10
$50,000-$74,999	7	17
$75,000-$99,999	7	20
$100,000-$149,999	18	32
$150,000-$199,999	14	12
$200,000+	52	9

About The Authors

Prof. GERALD BUBIS is the Founding Director of the Daniels School of Jewish Communal Service and Alfred Gottschalk Professor Emeritus of Jewish Communal Studies at Hebrew Union College, Los Angeles. He served from 1968 to 1989. Presently he is Vice President and Fellow at the Jerusalem Center for Public Affairs and Adjunct Professor of Social Work at the University of Southern California.

He has written, edited, and/or co-authored eight books and major monographs and published nearly 80 articles. He continues as a lecturer, trainer, and consultant. Over the years he has functioned in one of those capacities in over 100 communities throughout the world. He continues as a faculty member in the Council of Jewish Federations' professional education program and in the Wexner program for graduate training. He has been honored by over ten organizations locally and nationally.

He serves on many local, national, and international boards of directors, a number of which have elected him to the presidency.

He and his wife reside in Los Angeles and spend a number of months annually in Israel.

Prof. STEVEN MARTIN COHEN teaches at the Melton Centre for Jewish Education at the Hebrew University of Jerusalem. He specializes in the study of contemporary American Jews, focusing on such issues as intermarriage, Jewish identity, Jewish education, and Israel-diaspora relations.

He is the co-author of *Two Worlds of Judaism: The Israeli and American Experiences* and *Cosmopolitans and Parochials: Modern Orthodox Jews in America*. His earlier books include *American Modernity & Jewish Identity* and *American Assimilation or Jewish Revival?*. The results from his many national surveys of American Jews have been widely cited in the mass media.

For over 20 years he was a professor of sociology at Queens College in New York, and he has been a Visiting Professor at Brandeis University, Yale University, and the Jewish Theological Seminary. In July 1992, he and his family made Aliyah and moved to Jerusalem.

He has served as a consultant to several agencies including: JCC Association, Jewish Agency, WZO, UJA, CRB Foundation, Memorial Foundation for Jewish Culture, Wexner Foundation, Nathan Cummings Foundation, and American Jewish Committee, as well as the Jewish Federations of Detroit, New York, and New Haven.

THE JERUSALEM CENTER'S NEWEST PUBLICATIONS

Books:

Covenant and Constitutionalism: The Great Frontier and the Matrix of Federal Democracy
Volume 3 of the Covenant Tradition in Politics
Daniel J. Elazar

The ancient biblical idea of covenant gave birth to the late medieval Protestant pursuit of commonwealth in a polity constructed on the proper covenantal principles. These principles subsequently were transformed into the foundations of modern civil society that was given its best political form through constitutionalism. The way in which these ideas were transformed by modernity is the subject of this book. (Transaction Publishers, 1998)
300 pp.; $50 – NIS185

Constitutionalizing Globalization
Daniel J. Elazar

This book documents the revival of federal arrangements around the world and the development of appropriate global and regional constitutional mechanisms and controls that are part of a general shift from modern statism to postmodern federalism. (Rowman & Littlefield, 1998).
258 pp.; $23.95 – NIS90

Israel at the Polls, 1996
Shmuel Sandler and Daniel J. Elazar, eds.

The sixth volume in the JCPA's "Israel at the Polls" series analyzing Israeli Knesset elections since 1977. (Frank Cass [London], 1998)
288 pp.; $22.50 – NIS85

Kinship and Consent: The Jewish Political Tradition and Its Contemporary Uses
Daniel J. Elazar, ed.

Major scholars, leaders in their fields, explore the Jewish political tradition from their several disciplinary perspectives from biblical times to the present. The essays collected here demonstrate the connections between the earliest days of the Jewish political tradition through the expression of that tradition in the Land of Israel and in exile to modern and contemporary times. Third edition, revised and expanded. (Transaction Publishers, 1997)
630 pp.; $29.95 – NIS110

A Classification System for Libraries of Judaica
David H. Elazar and Daniel J. Elazar,

The third revised edition of the Elazar Classification System, first invented and applied in 1952 to allow for the cataloging of materials in any Judaica collection based on internal Jewish criteria. The system has been adopted throughout the Jewish world for use in libraries in synagogues, community centers, Hebrew schools, college campuses, and research institutions. (Jason Aronson, 1997)
264 pp.; $50 – NIS185

Monographs:

Religious Zionists in Jerusalem (Hebrew and English)
   This detailed study looks at the role of religious Zionists in the city, a fourth major population group (after ultra-Orthodox Jews, secular Jews, and Arabs), who serve as a bridging element between the secular and ultra-Orthodox. (JCPA, 1998)
   62 pp.; NIS35

How European Jewish Communities Can Choose and Plan Their Own Future
Daniel J. Elazar and Shmuel Trigano
   This report discusses the shape of postmodern Europe and the revival of European Jewry, and the place of European Jewry in world Jewish affairs. (JCPA and Institute of the World Jewish Congress, 1998)
   32 pp.

Serving the Jewish Polity: The Application of Jewish Political Theory to Jewish Communal Practice
Gerald B. Bubis, Daniel J. Elazar, and Melvin L. Silberman, eds.
   A handbook for the use of teachers and students in the schools and programs of Jewish communal service in the United States. (JCPA, 1997)
   265 pp.

The Effect of Class Heterogeneity on Scholastic Achievement in Israel
Victor Lavy
   An economic and statistical analysis of the effects of different social levels on scholastic achievement. (Milken Center for the Study of Educational Systems, 1997)
   65 pp.; NIS25

Forthcoming Books:

Jewish Centers and Peripheries: Europe between America and Israel 50 Years After World War II
S. Ilan Troen, ed.
   This book documents the reemergence of European Jewry at the end of the twentieth century. (Transaction Publishers, 1998)
   440pp.

Covenant and Civil Society: The Constitutional Matrix of Modern Democracy
Volume 4 of the Covenant Tradition in Politics
Daniel J. Elazar
   This volume explores the idea of political compact, constitutional systems, popular sovereignty, and the development of consociational and cooperative forms of political and social organization, especially in modern and early postmodern Europe. (Transaction Publishers, 1998)
   382pp.