

FUNCTIONAL QUALITIES REQUIRED FOR A SUCCESSFUL FEDERATION EXEC

BY JONATHAN W. KOLKER

Chairman, Board of the American Jewish Joint Distribution Committee (JDC)

I have been asked to write about the functional qualities required for a successful federation chief executive officer. I suppose that I received this assignment because of my longevity as a federation lay leader and because, as the chief lay officer of the Baltimore federation and later of JDC, I have worked closely with Robert Hiller, Steve Solender, Darrell Friedman, Michael Schneider, and Steve Schwager, all certainly among the best Jewish professionals of the past half-century. This article focuses on functional qualities, rather than personal qualities such as integrity, intelligence, and good judgment. Functional qualities are abilities based on knowledge and competency, the craft of the profession.

So here is my list of the 12 most important functional qualities required for a successful federation executive. I am certain that you will have others, and I hope that you will share them with me at jwkjrk@aol.com.

First and foremost, **a good federation exec must be able to formulate, with the help of lay leadership, a vision of the future for the community.** By vision I do not mean a revelation, but rather a well thought out plan based on sound knowledge. What should the community be like in ten years? What are the appropriate goals for the development of the community based on its specific needs and capabilities? It is the professional's responsibility to lead the community into the future, not merely to maintain the status quo. The professional must bring to the process the knowledge of what other communities are doing, the competency to assess the needs and capabilities of his or her community, and the knowledge of what federation can and should accomplish as part of the fabric of Jewish life. A professional must not only lead but must also know what to lead to. In the final analysis, an exec will be judged by how successful he or she is in

maximizing the potential of the federation to meet the future needs of the community.

To craft this plan for the future, to lead the community toward the goals of the plan, and to accomplish just about anything else, **the exec must know how to establish and maintain a consensus of the lay leaders.** That is easier said than done. The lay leaders can be a disparate group with conflicting ideas and agendas. Building and maintaining a consensus is an acquired skill. It involves knowing how to use process, how to form alliances, how to influence others, and how to negotiate and compromise without abandoning important goals.

In forming the consensus, **the exec must seek the vital center and eschew the dead center.** These are terms developed by the historian, Arthur Schlesinger, Jr., who posits that great leaders avoid directing to the comfort of the center of the consensus (the dead center) because that assures the status quo. Rather, they find that position far enough ahead of the dead center so as to lead the constituency forward toward new goals, but not so far ahead as to lose their support (the vital center). This is the quality that will enable an exec to lead the federation forward and maintain consensus at the same time.

Of course, **the exec must be skilled at financial resource development.** This is the primary function of federation, and lay leaders expect their exec to lead them in producing the financial resources necessary to meet needs and goal. A team of professionals will help, but the exec should be the best fundraiser in town. Successful campaigns are the *sine qua non* of being a successful exec.

Today, federations are complex financial institutions. Accordingly, **the exec must be skilled in financial management.** Of course, there may be a chief financial officer, but that does not relieve the exec from the

ultimate responsibility for the financial integrity of the federation. The lay leaders will rightfully expect the federation to keep its financial affairs in order. They will be unforgiving to an exec who fails to do so.

The quality of Jewish life in a community depends on the quality of Jewish services. Reaching federation goals requires sound program development. Accordingly, **the exec must be capable of leading the federation in the creation and delivery of appropriate services.** Even though those services may be delivered by independent agencies with their own professionals and board, the exec must lead the federation in creating, monitoring, and evaluating those services. And the exec must be ready, willing, and able to step into any failure of appropriate service delivery and to direct the changes necessary to reestablish satisfactory performance.

To assure the highest level of performance of the federation and the service delivery agencies, **the exec must take the lead in identifying and recruiting quality professionals to the community.** The exec is not only the professional leader of the federation but is also the leader of the local community's development and service professionals. He or she serves officially or unofficially as their mentor, cheerleader, and confidant. It takes a great team to realize a great community. The federation exec is the team leader.

Once the community has attracted quality development and service personnel, **the exec must be ready, willing, and able to delegate authority along with responsibility.** This is perhaps the most difficult requirement for many execs, who by their very nature are control-oriented. Yet, it is only by releasing the creativity and enthusiasm of the professional staff that a community can reach its maximum potential. Delegating responsibility without authority impedes the development of the community, discourages staff, and inhibits the realization of the vision plan.

The exec must exercise courage and speed in responding to unexpected challenges. This is a difficult task, as most execs

are cautious by nature. However, the exec is a fiduciary standing watch for the federation. The lay leaders expect him or her to respond to emergency needs, to represent the federation in stressful situations, to protect the community and its members, and to seize opportunities. Leaders lead.

At the same time, **the exec must maintain calmness and orderliness and generate a confidence in his or her leadership.** Good leaders get ahead of issues and are proactive in facing challenges. There must be both the perception and reality that there is a strong hand at the helm, that the affairs of the federation are under control, and that the federation is moving forward in a deliberate way toward its goals.

And always, **the exec must be responsive to the concerns of lay leadership.** This is what makes the position a 24/7 job. The exec is constantly on call to respond to the needs of the federation's constituents. Just as important, the exec must make all constituents feel that they and their concerns are important and that they are welcomed and included in the federation family. Federation is an inclusive institution; the exec must be inclusive in the pursuit of his or her responsibilities.

Last, but by no means least, **the exec must maintain the support of the federation leaders.** Without this support, he or she cannot lead. Maintaining this support requires a team approach to the major decisions so that lay leadership "buys into" the program in advance. Constant consultation is also important, as is sharing of responsibility for articulating the program.

I have just described a set of criteria that is not to be found in any one human being. However, these qualities give us an understanding of why the position of federation exec is so demanding and difficult. The continued success of our federation system depends on our providing functional skill training for present and future execs. In the meantime, we can all take a moment to appreciate the fine quality of the men and women who are serving as our execs today. Hats off, please.