

MAKING LEADERS

How the American Jewish Community Prepares Its Lay Leaders

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The author analyzed the methodologies, core components, and educational objectives of the lay leadership development and training programs of 40 national and local Jewish organizations. He found that, with very few exceptions, the programs did not actually train lay people to be leaders.

In this 350th anniversary year, much attention has been focused on the accomplishments of Jews in the United States, both individually and communally. Among the most impressive of these achievements, particularly over the last 100 years, has been the creation of an elaborate infrastructure of voluntary organizations. Responsible for a wide array of activities, from raising funds to providing the services deemed necessary for meaningful Jewish life, these groups operate within a rubric in which power is shared between unpaid boards of directors and a cadre of remunerated professionals. In sharp contrast to the all-encompassing *kehillah* model of the Middle Ages, this system of circumscribed voluntary organizations has characterized Jewish life in America at least since the early decades of the twentieth century. By the mid-1960s, Harold Weisberg (Weisberg, 1972), dean of the graduate school at Brandeis University, observed that "Jewish life in the United States is expressed primarily through a culture of organizations. To be a Jew is to belong to an organization." Similarly, when Melvin Urofsky (Urofsky, 1981), writing in the early 1980s, sought to explain the absence of individual great leaders in American Jewry, he did so by noting that in the United States "leadership is a function of organization," not single titans. Despite vast upheavals in American and Jewish life in recent years, this culture of organizations remains very much a hallmark of contemporary American Jewish life (Wertheimer, 1995).

Today, there are more than 285 recognized national Jewish groups in the United States, divided by function into categories that include: community relations, cultural, Israel-related, overseas aid, religious/educational, social mutual benefit, and social welfare organizations (*American Jewish Year Book*, 2002). Frequently, these national groups have local branches, chapters, or, in the case of the synagogue movements, affiliated congregations spread out in locales across the country. In addition, there are approximately 180 local Jewish federations and welfare funds operating in Jewish communities with populations of 1000 or more. In the aggregate then, "there are literally thousands of Jewish organizations that operate on both the national and local levels" in contemporary America (Dobkowski, 1986). (Since this analysis only concerns voluntary organizations, it does not include professional associations and certain educational institutions that do not have a lay infrastructure.)

Not surprisingly, there are enormous differences in mission, size, and operating styles among these groups. In addition, divergent ideologies and foci, as well as variances in constituencies and funding patterns, all militate against painting a monochromatic picture of American Jewry's organizational landscape. Despite these significant distinctions, however, many of these organizations (along with not-for-profits in other sectors of American life) share an overarching concern for the future development and training of

their lay leadership. The ability of an organization to continually engage and energize its volunteer leaders over a protracted period can often make the difference between its long-term success or failure.

Owing to an array of well-documented sociological developments, many Jewish organizations in America have had increased difficulty in recent decades both sustaining, and when necessary, replacing their volunteer leaders (Cohen & Eisen, 2000; Putnam, 2000). As a result, these groups have become steadily concerned about what is understood to be a rising crisis in organizational leadership. Mirroring a pattern found in industry (though obviously on a considerably more modest scale), Jewish groups have responded to this crisis by investing considerable amounts of their otherwise strained budgets in developing and training the next generation of communal officers and trustees (Conger & Benjamin, 1999). In synagogues and community relations groups, federations, and social welfare organizations, concerns about future governance have propelled leadership development to the top of the American Jewish communal agenda.

METHODOLOGY

The present analysis seeks to understand precisely what leadership training and development mean to the very organizations, groups, foundations, and institutions that have advanced their cause. I researched the methodologies, core components, and educational objectives associated with some of American Jewry's most popular programs of lay leadership development and training. With more than 25 years of first-hand experience as an organizational executive and faculty trainer, I was well acquainted with American Jewry's most important programs of lay leadership education. In an effort to avoid the sin of Procrustes, however, I carefully selected a diverse sampling of Jewish organizations from across the country, which included 13 national and international organizations — religious movements, defense organizations, educational/cultural groups,

philanthropies, and Israel-based organizations; two eponymous private foundations with missions that focus primarily on lay leadership training; and nearly 25 local affiliates of national or international Jewish groups, including federations, synagogues, community centers, schools, campus groups, and social service agencies. In cases when sponsoring organizations offered more than one leadership training program for their laity (often targeted at divergent audiences), I made every effort to include the maximum number of such programs in my analysis. I reviewed syllabi, met with faculty, interviewed professionals responsible for the design and execution of these programs, sat in on actual training sessions, and questioned individual participants. In each case, I sought information across a broad continuum, ranging from selection criteria, cost, venue, and program structure to curriculum, faculty, and long-term follow up. To provide a context in which to understand these issues, I compared my findings on leadership training programs in the American Jewish community with what is known about leadership education in the for-profit arena. In this regard, I studied best-practice analyses from some of the most effective corporate leadership training models throughout the United States.

The following section contains both a summary and analysis of the major trends that inform lay leadership education programs in American Jewish life today. I intend neither to approbate nor excoriate individual offerings or their sponsors. To the extent that I have specific criticisms and (in the concluding portion) some modest recommendations, I endeavor to express them without identifying any specific organizations by name.

SUMMARY OF FINDINGS

Despite the widespread popularity of leadership training programs throughout the organized Jewish world, there is little or no agreement as to what is meant either by leadership or by training. When it comes to defining who should participate, there are

two distinct approaches: one that restricts participation to those who already hold (or are about to hold) some titled position in the Jewish community (e.g., board chair, president, trustee, committee member, etc.), and one that treats *every* member of the organization as a potential leader, and therefore automatically eligible to participate. In the first case, the American Jewish community has confused office-holding (i.e., authority) with leadership (Heifetz, 1994). That is to say, volunteers who have been (or are likely to be) “elected” or appointed to positions in their organization are, ipso facto, understood to be Jewish leaders, regardless of their skill sets, competencies, behavior, or personal attributes (Lewis, 2004). In the second case, the growing anxiety over who will step forward to don the mantle of governance in the future has led many Jewish groups to equate leadership with a willingness to serve. In both cases, real questions exist as to the bases on which those who participate in these programs can be considered Jewish leaders at all.

Related to the issue of who should participate in leadership programs is the question of requirements. That is, what, if any, prerequisites should exist for eligibility? Certain types of organizations conceive of leadership training as an exclusive, even elitist venture. They insist on formal nomination, recommendation from a recognized communal authority, a written statement, and, in some exceptional cases, personal screenings before admitting participants. Often sponsored by a national organization as a means of assisting its affiliated chapters, this approach to leadership development is also quite prevalent among federations and has become the hallmark of several nationally recognized private foundations devoted to lay leadership education. The unabashed goal is to foster a sense of leadership cachet by constructing highly restricted, homogeneous groupings (e.g., incoming agency presidents, young professionals, wealthy philanthropists, or the like), and socializing participants to see themselves as leaders. Others, as noted, in-

cluding most educational institutions and congregations, tend to cast a much broader net and require nothing more than desire to participate. In either case — highly selective or broad-based — the overwhelming majority of these programs employ a rather generous use of the term ‘leader’ when referring to participants.

Enveloping all of these issues is the matter of economics. Not surprisingly, programs of leadership education cost a great deal of money. With only one exception, a national community relations group with a long-standing history of investing in leadership development, every group I interviewed, from Hillel International to the Jewish Reconstructionist Foundation to the Jewish Community Centers Association, indicated that their budget for leadership development has increased considerably over the past ten years. Many of the larger groups now have full-time departments with one or more professionals devoted exclusively to leadership training and development. In the case of the highly respected Wexner Foundation, the entire expansive enterprise is devoted to “programs designed to enhance the quality of leadership” in the Jewish community.

There does not seem to be a monolithic approach to the question of paying for these leadership programs. Participant costs vary between several hundred dollars for a short-term workshop or seminar to more than \$10,000 per student annually for a multi-year course of study. In less than 10 percent of the programs studied, attendees paid their own way, including transportation and lodging. Far more often, the sponsoring organization or local affiliate makes the decision to “invest” in the individual by subventing part and sometimes all of the associated costs, with the stated expectation that such an investment will pay huge organizational or communal dividends in the future.

Several variables account for the costs of a leadership program, including duration, faculty, and what I call “atmospherics.” Again, there is a considerable diversity of practice in the Jewish community. Venues

for these programs run the gamut from local synagogue-school classrooms and JCC boardrooms to conference centers in Aspen and ballrooms in Jerusalem. With regard to faculty, in the majority of programs studied, leadership courses are taught by “insiders” — rabbis, administrators, and organizational staff who are already on the payroll of the sponsoring organization. A less prevalent approach involves bringing in expensive outside experts, some of whom are perceived to have celebrity status in the Jewish world. To be sure, graduates of these latter programs are quickly taught to understand that their training is informed by a certain heft not typically available to the average Jewish lay leader.

Most groups in this study expressed disagreement with this approach for reasons that seem to go beyond budgetary constraints. To paraphrase one national leadership program that opts not to use high-profile faculty, “While it is often the norm for an ‘outside expert’ to fly in and teach, our students and [in-town] faculty have the time to develop close relationships. Students enjoy having access to teachers outside of class.” A senior executive for a venerable defense organization expressed a similar sentiment: “Since one of our goals is to develop long-term organizational loyalty, we’d rather expose lay leaders to our own people, whom they are likely to see repeatedly over the course of their volunteer careers.”

Determinative with regard to cost, and quite important on several other levels, is the question of duration. I found three distinct responses to the question of how long leadership training programs should last. Among community-based groups, such as local federations, individual congregations, and chapter affiliates of national Jewish agencies, the most common approach features a series of free-standing, though thematically linked sessions. While some groups attempt to consolidate their training into only three or four meetings, the average for these locally sponsored leadership training programs is eight to

twelve sessions, typically lasting anywhere between 90 and 150 minutes each.

Second are the leadership training programs sponsored directly by national Jewish organizations — the American synagogue movements, Hillel International, American Israel Public Affairs Committee, American Jewish Committee, the Jewish Community Centers Association, the United Jewish Communities, and the like. In these cases, participants from all over the country gather in a single venue for leadership programs that are conducted over a multi-day period, often a weekend or week-long conference. Concurrent sessions run during the day and well into the evenings. These programs often take place at a camp, hotel, or conference center. Rather than conducting all the training at one time, some of these groups, such as the Union for Reform Judaism’s “Synagogue Associates” program, break up their offerings, requiring students, for example, to participate in weeklong seminars over two successive summers or, in other cases, to attend three weekend workshops during a 12-month period. In a program run by the national office of the American Jewish Committee, selected participants come together from around the country eight to ten times over the course of a year as part of their leadership training.

The leadership programs of longest duration in American Jewry today are sponsored not by national organizations, individual groups, local federations, or synagogues, but rather by eponymous philanthropic foundations and institutes. While their policies and practices vary widely with regard to eligibility, cost, faculty, and other factors, the length of study in programs sponsored by groups like the Florence Melton Jewish Leadership Institute and the Wexner Heritage Foundation far exceeds that of most other Jewish leadership programs. On average, these groups run for two years. Participants attend classes weekly or semi-monthly, for two to two-and-a-half hours at a time. Summer seminars and periodic weekend program-

ming usually supplement the in-class offerings.

With regard to follow-up programs, again there is a broad continuum of practice. Representatives of almost every organization I researched appreciate the theoretical value of program follow-up. Not surprisingly, the most well-financed of these programs, those with professional staffs to oversee such efforts, do offer their graduates some sort of regular follow-up, including the distribution of additional reading material, alumni listservs, and periodic reunions. Most groups have failed to build formal follow-up into their leadership education offerings. For example, although many programs sponsored by local federations do strive to have their graduates placed in some official volunteer capacity after their formal training, there is little or no evidence of any systematic post-training, monitoring, or follow-up. The same holds true in many of the leadership training programs offered by synagogue movements, individual congregations, and the nexus of national Jewish organizations, including schools, JCCs, and informal educational institutions. Frequently what happens in these cases is that graduates report going to a leadership program, coming back all enthused and raring to share, only to find that the rabbi, agency director, or even fellow volunteers are, at best, too busy to facilitate any serious follow-up or implementation.

What exactly do Jewish groups mean when they invoke the mantra of leadership development and training? Intellectual honesty and academic integrity compel me to conclude that, with very few exceptions, what currently passes for lay leadership education in the American Jewish community is simply not leadership education in any sense of that word. I do not mean to suggest that the many and varied programs sponsored by the pantheon of American Jewish organizations are without redeeming value or that they are unimportant for today's American Jewish volunteers. Rather, I suggest unambiguously that these programs, whatever their inherent worth, do not, to any signifi-

cant degree, constitute leadership training and development.

Today, the most prevalent programs purporting to be Jewish lay leadership education consist either of those that seek to transmit specific skill-sets and competencies or those that provide formal instruction in Jewish literacy. (Occasionally, as in Hadassah's Leadership Academy, some seek to combine the two.) In the most intensive of the literacy programs, participants attend classes for an amount of time equal to slightly more than a three-credit undergraduate quarter course. Faculty members are often experts in their field, and a modest amount of outside reading is usually assigned. Although syllabi differ from program to program, Jewish literacy courses usually include something like the following: Basic Judaism and Religious Practice, Jewish Ethics, History of the Jewish People, Jewish Thought, and Contemporary Jewish Issues.

There is, of course, some variation among the literacy programs. In many federation-sponsored courses, for example, the literacy component incorporates a unit on tzedakah and an orientation to Jewish communal resources — locally, nationally, and internationally. Sometimes, a field trip to local agencies, synagogues, and related institutions caps the experience. Congregational-based leadership programs often include basic Hebrew reading, cantorial skills (davening, Torah reading, etc.), and an orientation to the ideology of the sponsoring movement as part of Jewish literacy. Israel-advocacy, community relations, and campus groups frequently consider units on modern Israel, the contemporary Middle East, and Israel-Diaspora relations to be vital parts of Jewish literacy for their volunteer leaders. In many cases, these latter groups incorporate a fact-finding mission to Israel or another overseas Jewish community as part of their leadership training program.

In groups where literacy is not the dominant aspect of the leadership training agenda, it may still be considered worthy of inclusion. Examples of what might be called "lit-

eracy-lite" abound in Jewish lay leadership training programs. Frequently, they include devoting some portion of time to classical text study, often in the form of *divrei Torah*, examination of the weekly Torah portion, or the like. In other settings, selected sacred texts are incorporated into leadership programs when the goal is to explore some uniquely Jewish dilemmas of contemporary communal life. JCC officers, for example, have occasionally studied rabbinic sources in a leadership training session on the contentious question of whether to open the Center on Shabbat or Jewish holidays. Occasionally, synagogues and even some federations incorporate selected Jewish sources into discussions of fiscal responsibility, marketing, and related issues of organizational governance. When national groups hold leadership programs over Shabbat, they often include some literacy programming as part of the observance of the day.

Despite the emphasis on literacy or text study, the inescapable irony is that in most leadership training programs run by the American Jewish community, the actual subject of Jewish leadership is never taught. Curricula rarely include anything about the history, value system, or governing principles of Jewish communal leadership. With few exceptions, neither paradigms nor personalities of Jewish leaders receive serious consideration except, of course, for the seemingly ubiquitous *d'var Torah* on the life and work of Moses. In all but a handful of cases, these programs ignore classical Jewish teachings on: power, authority, or reciprocity (the complex relationship between leaders and followers) as they apply to communal leaders. Precious little attention is devoted to the examination of personal leadership styles and *middot* (attributes) for Jewish leaders, despite a treasure trove of sources on the subject.

Clearly, the idea of teaching Jewish communal officers more about Jewish history, thought, and practice is both noble and laudable. The growing popularity of including text study into the conduct of an organiza-

tion's business is a positive and wonderful statement and one that would no doubt shock organizational *machers* of bygone eras. *Jewish literacy, however, is not the same as Jewish leadership.* Nor can courses in basic Judaism, however rigorous and well taught, automatically make Jewish leaders. It is one thing to say that Jewish leaders should be Jewishly literate; or to argue, as I have, that no one should be elected or appointed to a position of communal responsibility absent a personal commitment to Jewish learning. It is quite another thing, however, to contend, either overtly or by implication, that Jewish literacy alone is sufficient to guarantee effective leadership (Woocher, Winter/Spring 1999).

My investigation into these programs reveals that those that define leadership training in terms of specific skill sets (rather than Jewish literacy) are subject to similar concerns. When the particular skills being taught are analyzed, it becomes clear that, in the overwhelming majority of cases, they are not leadership skills at all (Kotter, 1990; Zalenik, 1990). While true leadership development involves the transmission of such skills as: coping with change; visioning and setting direction; aligning, motivating and inspiring people; fostering teamwork; challenging others to maximize their potential; mentoring; and risk taking, the most popular programs of lay leadership training in the Jewish community focus instead on budgeting and financial management, marketing, fundraising, and how to run an effective meeting.

To be sure, a few programs sponsored by Jewish groups do endeavor to really teach leadership. The Jewish Community Center Association, for example, runs a program called "Next Generation," targeted at future JCC officers. For a few hours, over a day and a half, participants attend sessions such as "Mapping Your Leadership Skills," "Impediments to Leadership," "Measuring Your Current Leadership Skills," and "Building Your Legacy." In addition, a session entitled "What It Means to be a Jewish Leader" is included in the training program. As impor-

tant as these sessions are, however, they are offered to volunteer leaders only once in their career, for no more than a few hours during JCCA's biennial conference.

Most programs, however, feature a random mélange of diverse leadership theories, not a systematic and clearly articulated approach to leadership that is rooted in both classical Jewish teachings and best-practices from industry.

I do not oppose the transmission of organizational skill sets for Jewish volunteers. Indeed, anyone familiar with the organized Jewish world will appreciate the importance of fiscal management, fundraising, and the like. It is difficult, if not impossible, to run a volunteer organization without them. These, however, are not leadership skills. As the Jewish community has proven repeatedly, the possession or acquisition of any or even all of these competencies is no guarantee of effective, and certainly not authentic, Jewish leadership. Referring to them as leadership skills or teaching them in courses that are hailed as leadership training and development creates an illusion and perpetuates a myth about leadership, in general, and the individual graduates of these programs, in particular.

In all of the so-called leadership programs — those emphasizing literacy and those focusing on skill-set development — the suggestion that participants are better prepared and more qualified to lead, strictly on the basis of their studies, is insinuated both formally and informally. As a well-respected Jewish woman's organization declares in publicizing its highly touted training: "Every Jewish woman — a learner; a leader." The supposition of credibility surrounds those who have participated in such programs. A major synagogue movement, for example, promotes its program by promising affiliated congregations that graduates will "feel prepared for leadership roles." Participants of a highly regarded literacy series are told that they will receive the "information and skills" to help them "make decisions for the Jewish community." Yet a different program tells

participants that by becoming Jewishly literate they will "expand the[ir] leadership vision [and] bring a Jewish language of discourse to the policy and decision-making" activities in which they will be engaged. A popular training course in a large metropolitan area, with a prominent faculty teaching its basic Judaism courses, advertises that such study will produce "leadership for a new age." Although the research revealed no evidence that these groups are willfully seeking to deceive or mislead, it is unmistakably certain that the organizers of these programs truly believe that they are, indeed, making Jewish leaders.

MAKING LEADERS

While the purpose of this analysis is not to redesign every volunteer Jewish organization's approach to leadership training, it hardly seems responsible to level such a critique without at least suggesting the possibility of a new direction. In this spirit, I offer the following modest guidelines for reconceptualizing Jewish lay leadership education in America.

Three hundred and fifty years after its founding, the American Jewish community must rethink its indiscriminate use of the words "leader" and "leadership." As a first step, Jewish organizations should affirm a clear distinction between *volunteer training* and *leadership development*, a distinction not dissimilar from the business community's widely accepted bifurcation of management and leadership. Most of what currently exists throughout the American Jewish community fits well within the rubric of volunteer training. In today's environment, to volunteer for a synagogue, federation, JCC, Israel-based or community-relations group is a positive statement of communal affiliation and Jewish identity (and may be indicative of a predisposition toward serious Jewish learning). Those who step forward to volunteer ought to be validated and treasured. The volunteer experience will only be enhanced when the individual in question becomes conversant with basic Jewish values and

practices and when he or she has achieved a level of technical proficiency required for the performance of important volunteer tasks. For this reason, every non-profit organization, working hard to compete for volunteers, must continue to invest in the kind of training programs that characterize so many American Jewish groups today. The issue at hand then is not whether Jewish groups should engage in volunteer training. Rather, the issue is to differentiate between such programs and genuine leadership development, thereby acknowledging that graduates of the extant programs are not *prima facie* Jewish leaders.

Having distinguished between volunteer training and leadership development, American Jewish groups must set about the task of rethinking their entire approach to leadership education. At a minimum, *programs purporting to be Jewish leadership development should teach about Jewish leadership*. They should include material about the history of Jewish communal leadership, its major paradigms, and key personalities, as well as classical Jewish principles of effective and authentic leadership.

At the same time, and consistent with the Maimonidean injunction to "consider the truth, regardless of the source," Jewish leadership development programs should be willing to incorporate appropriate best-practices from industry (Bennis, 2003; Conger & Benjamin, 1999; Giber et al., 2000). Jewish groups wishing to design a program that is truly worthy of being called leadership development should consider the following principles:

- Leadership development programs must have a clear and focused audience in mind. The specific goals of the training, as well as the faculty and curriculum, must be aligned with and geared to that audience.
- Leadership development must take place over a protracted period. One does not acquire the skills of leadership in short order.
- Leadership development must be more

than theoretical classroom work. It must provide participants with hands-on experiences and meaningful opportunities to "practice" leadership.

- Leadership development must provide participants with substantive mentoring and/or coaching opportunities as part of the training experience.
- Leadership development programs must create ongoing opportunities for participants to understand, evaluate, and reflect on their personal leadership styles.
- Leadership development programs must provide participants with regular opportunities for feedback and observation throughout the process.

The Talmud in *Rosh Hashannah* (25 a-b) makes it abundantly clear that not every Jewish leader will be a person of impeccable integrity or one who has been destined for greatness from birth. Far from being an innate trait, leadership involves a set of behaviors and activities, much of which must be taught. The organizational and institutional health of the American Jewish community, in this its 350th year, depends in large measure on its ability to do that which it is not currently doing; namely to provide those who have risen to the top of volunteer governance with a sophisticated understanding of what it means to be an authentic Jewish leader, along with the tools necessary to lead effectively.

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