

STRENGTHENING PROFESSIONAL LEADERSHIP OF JEWISH AGENCIES: THE TRI-STATE JEWISH PROFESSIONAL LEADERSHIP INSTITUTE

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*"One who does not increase one's
knowledge, decreases it."*

Pirkei Avot 1:13

Over the last two decades, significant trends emerged that gave focus to a new skill set necessary for Jewish communal professionals. Rapid technological advances and shrinking financial resources created a heightened demand for efficiency and good business and management practices. Shifts in the nature of voluntarism, the geographic dispersion of the Jewish population, and increasing overseas needs placed further demands on communal planning. Local and national Jewish population studies focused attention on issues of Jewish identity, education, and the role of synagogues, as well as the need for Jewishly knowledgeable professionals and Jewishly informed agencies.

The responses to these trends have been dramatic and varied in Philadelphia and the tri-state area encompassing Southeast Pennsylvania, Southern New Jersey, and Delaware. They emerged in planned and unplanned ways, initiated by grassroots Jewish communal professional groups and by educational institutions. This article explores models for training professionals to understand and address emerging trends, work col-

laboratively across agency and geographic lines, and be prepared to lead the Jewish agencies of the future.

PROFESSIONAL LEADERS: PARTNERS IN COMMUNITY BUILDING

*It is not your duty to finish the work; but
neither are you free to desist from it.*

Pirkei Avot 2:21

This is an exciting time to be working in the field of Jewish communal service. We see signs of Jewish renaissance all around us: Jews are well represented in all spheres of American life and are leaders in many professional, civic, and cultural arenas, and the Jewish community is the most highly organized and most philanthropic of any single religious group. Books on Jewish themes line the walls of popular bookstores; enrollment in Jewish day schools and courses of Jewish study in universities is growing. Jewish organizations seek to hire professionals with strong Jewish backgrounds, and many are adding rabbinic consultants to their professional teams. There are synagogues and *chavurot*, Jewish web sites, Jewish periodicals, Jewish adult education courses and support groups, and Jewish organizations of multiple religious and political flavors. The National Jewish Population Survey of 1990 revealed that nearly 80 percent of all Jews indicate that being Jewish is important to them.

Our challenge is to listen carefully for signs of what today's Jews mean when they

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say that "being Jewish is important." It is time to join together—lay leaders and professionals, rabbis, educators, and researchers—to exchange ideas and develop creative ways to open doors for Jews who may not know how to connect to this thriving network of Jewish life.

A highly sought-after Jewish communal professional is one who possesses a breadth of professional expertise, has strong management and administrative skills, works well with volunteer leaders, has experience in financial resource development, and is Jewishly identified and knowledgeable. Given the changing nature of voluntarism and the recognition that communal issues and needs are complex, agencies are increasingly relying on professional leaders to lend the stability, continuity, expertise, and leadership necessary for agencies to thrive in this rapidly changing world.

Today's Jewish communal professional must lead in *partnership* with the board and volunteer leadership. Jewish communal professionals must find new ways to draw on the invaluable perspectives, talents, and creative and financial resources of lay leaders. Recognizing that volunteers' lives are consumed by multiple demands, it is important that their engagement in Jewish communal life be well suited to their skills and interests. When there is a synergistic partnership between the volunteer and professional leaders, strong and vital agencies and synagogues emerge. Cultivating this healthy sense of partnership is well worth the investment. Agencies can help nurture this partnership by seeking professionals and volunteer leaders who are fully respectful of the mutuality of the lay-professional relationship and by creating an environment where a sense of partnership is expected and supported.

Professionals' busy schedules and "full plates" are often excuses for devoting far too little time to the kind of honest communication and clarification of roles and expectations that is optimal between each and every professional and volunteer leader. Each of us should recall a time in our own careers when

our creativity and energy was unleashed because of such a partnership. Analyzing the successful elements of these positive relationships will enable us to replicate them—for ourselves and for others within our system. When the lay-professional relationship is one of symmetry and balance, mutual respect and trust, Jewish programs, services, agencies, synagogues, and organizations can soar.

RESPONDING TO CHANGE: RESOURCE DEVELOPMENT AND TECHNOLOGY

"To everything there is a season; and a time to every purpose under heaven...A time to plant and a time to uproot;...A time to break down and a time to build up"

Ecclesiastes 3:1-6

In his ground breaking article in the Fall 1996 issue of this *Journal*, "Re-engineering the Jewish Community," sociologist Dr. Steven M. Cohen (1996) described the beginnings of a sea change in Jewish philanthropy. He challenged federations to ride the waves by embracing the decentralization of fundraising, nurturing it in creative and forward-thinking ways. He argued that federations could enhance their central role in the community by encouraging the sharing and regionalization of resources, thereby unleashing the potential for greater philanthropic dollars in new and unimagined ways. He also challenged federations to "move toward assuming headquarters functions: the responsibilities that cut across functional agencies, such as the management of information and professional personnel recruitment and training...centralized purchasing and communal planning."

Jewish agencies and synagogues throughout the Delaware Valley region have independently expended enormous time and resources on computer and technology consultants and training, personnel and human resources services, volunteer and professional recruitment and training, financial resource development and marketing, and

the purchasing of equipment, computers, and other technology. The Jewish federation is increasingly seen as a source of expertise in these areas, and some steps have been taken to offer and envision how such expertise and resources can be channeled to the agencies in a more systematic way. For example, in Philadelphia, the Jewish federation's personnel director has advised many agencies in the areas of benefits and personnel matters, Endowments Department personnel have guided agencies in seeking grants and setting up endowment funds, and in 1999, the federation's computer training workshops were made available to all personnel in Jewish agencies housed in their building. Dramatic technological changes have unleashed new possibilities for shared resources and the regionalization of communication, technology, and service provision.

Financial resource development, once the exclusive realm of Jewish federations, has become by necessity part of every Jewish agency and synagogue setting. More often than not, professionals and Jewish agency executives find themselves involved in some component of the development process. Some professionals have stumbled into this arena ill equipped and unable to attain commensurate professional training to accomplish this new responsibility. In other instances agencies have engaged development staff who may not have come out of the Jewish communal world.

In his latest book, *The Tipping Point*, Malcolm Gladwell (2000) describes how to identify "epidemics and trends" by exploring the underlying patterns or contagious behaviors happening at a dramatic moment in time. The name he gives to that critical moment when everything can change at once is the "tipping point." Gladwell (2000) advises professional leaders to be aware that change is not only possible but inevitable and that people can transform their behavior with the right kind of impetus. While particular institutions, people in power, and decision-making processes may seem immovable, they are

not. With a slight push in the right place, even "sacred" concepts can topple.

Years ago, for example, donor-directed philanthropy was seen as a threat to federated giving. Today, it is clearly seen as a way to bring new dollars and volunteers into the community. Not too long ago, agency-based campaigns and multiple Jewish funding sources were also seen as harmful to federated campaigns. We are now beginning to see that harnessing the energy of family foundations, venture philanthropists, entrepreneurs, funders' networks, and the like can ensure that new and necessary resources are available to help build our communities. Sweeping technological advances and philanthropic changes may be bringing about another "tipping point."

It is therefore imperative for Jewish communal professionals to seek opportunities for study and for interagency communication in order to keep current and be able to recognize the trends and patterns that Malcolm Gladwell describes. Overcoming resistance to change is an age-old challenge. At times change will be unavoidable, such as keeping up with the technology age. At other times, change will require strong leadership, disciplined focus, and a willingness to constantly reevaluate and reassess that our efforts, resources, and structures are directed toward the pursuit of our mission, not program. Agencies need to be flexible enough to be "tipped." Once leaders are open to this concept, stronger foundations can be laid for the future and new growth can occur.

Embracing such change is appealing to today's volunteers who live in a fast-paced and consumer-driven culture and are impatient with bureaucracy and slow decision-making processes. Allowing outmoded structures to topple may enable Jewish institutions to better tap into human potential and volunteer time, explore new models for collaboration and resource sharing, take advantage of technological innovations, and be prepared to address fundraising challenges and communal needs from a position of strength. While the Jewish communal system

thrives, with Jewish agencies, organizations, and synagogues maintaining a healthy sense of independence, access to centralized services and expertise in technology, marketing, personnel, web site and information services might lead to welcome opportunities for efficiency and mutual benefit.

As competition for philanthropic dollars grows, Jewish federations must redefine for this generation the rationale for a centralized campaign, beginning with those who are employed by the Jewish community. If the field were to ask Jewish communal professionals why, as a Jewish community, we conduct our campaign in this manner, the answer would elude many. Wouldn't we have stronger campaigns if the stakeholders understood and endorsed the reason for its existence? Federated giving was developed to avoid duplication and to ensure that the most vulnerable parts of the community were served, that funding is directed not only to the trendy issues that people enjoy supporting but also to the mundane, everyday needs of real, yet faceless people. Protecting donors from countless "multiple asks," while meeting community needs, has been a sound principle.

Are we ready for the challenge? Can the Jewish communal field develop mechanisms to anticipate and embrace opportunities for change, welcome new fundraising models, integrate technological innovations, and envision a federated system that adds "head-quarters services" to its historic model of resource development?

PREPARING PROFESSIONAL LEADERS

"Great is Torah study because it provokes good action,"

Kiddushin 40a

In the early 1980s, the Greater Philadelphia Association of Jewish Communal Workers (since 1998 called JCPA, the Jewish Communal Professional Association of the Delaware Valley) decided to add a series of classes on Judaism to its annual programs

of professional interest. The groundswell of interest from the grassroots professional group was the beginning of a philosophy that has since become embedded in the culture of Jewish agencies in Philadelphia. Professionals themselves sensed the importance of enhancing their own Jewish identity and that of their agencies. They organized themselves to provide programming that would encourage networking and an awareness of services and issues across the Jewish communal field. In 1989, Ferne Katleman, formerly with the Council of Jewish Federations and then with the Wexner Foundation, came to Philadelphia to keynote a program for JCPA. She spoke forcefully of the importance of professional training in order to equip Jewish communal workers to address community needs and enhance the status of the field. Katleman encouraged JCPA leadership to organize regionally and to plan a comprehensive program of professional enhancement throughout the tri-state area.

In 1991, after a one-year planning process funded by the Wexner Foundation, the Tri-State Jewish Professional Leadership Institute was founded; it was fully supported for its first three years by the Wexner Foundation. After the initial funding and evaluation period, the local communities joined forces, and the Institute was supported by the Jewish federations of Greater Philadelphia, Southern New Jersey, and Delaware, with the Federation of Greater Philadelphia serving as the lead agency and primary funder. Additionally, in some years other local educational institutions—the University of Pennsylvania and Gratz College—provided financial support and ancillary services.

Since its inception, seven year-long Institutes and one year of multiple seminars have been held, bringing together a cadre of Jewish communal professionals from a wide range of Jewish settings. Five of the Institutes targeted middle management, and two were designed for professionals in the field for three to five years.

The Tri-State Institute is a model of regional collaboration, bringing together the

talents and perspectives of a broad spectrum of professionals who work for the Jewish community in synagogues, organizations, and agencies. The challenging and complex issues facing our community are studied with expert instructors in a context that draws both on Jewish texts and innovations in management. Dr. Rivka Ausubel Danzig, former director of the Tri-state Jewish Professional Leadership Institute and adjunct faculty at the University of Pennsylvania School of Social Work, summarized the effectiveness of this training program as follows: "This model of sustained, professional development is the kind of approach that can imbue talented professionals with a broader vision. The key to its lasting potential is its core concepts of interagency and interdisciplinary collaboration and the integration of Judaism and sound management practices."

In June 2001 the Tri-State Institute for Jewish Professional Leadership surveyed its 136 alumni to assess the impact of their participation in the year-long Institute. Fifty-five responses were received, representing 40 percent of the alumni. The vast majority of respondents (90%) are still working in the Jewish community. More than half have been promoted, many to senior management positions (approximately 4/5 of the participants were middle management). Two-thirds of the respondents said they participated in collaborations with colleagues from other agencies because of networking with other participants in the program. Many reported an increase in Jewish knowledge that enhanced their personal practice, and many stated that the program gave them Jewish values and skills that they brought back to their workplaces. Sixty percent reported that the seminar reinforced their commitment to Judaism, the community, and their profession.

The survey yielded numerous expressions of appreciation for the cutting-edge management skills learned. Many stated that they learned from the Tri-state program a new way of thinking—regionally and collaboratively. The mentor component of the pro-

gram was also highly rated, because it enabled participants to address issues and problems that arose within their own particular agencies and to discuss questions about the roles and responsibilities of professionals and volunteers.

Reflecting on the impact that the Institute has had on the regional Jewish community, Dr. Ernest Kahn, its founding chairman, stated,

Over the past eight years, the Institute has engaged hundreds of professionals across the spectrum of Jewish organizational, agency, and synagogue life as participants, mentors, and teachers in the program. This has helped to foster a culture of interorganizational and regional collaboration and enabled professionals to experience the benefits of interdisciplinary study and training. Through the mentor program, the Institute has helped to nurture a culture of mentor and peer professional consultation in the Tri-state Jewish communal system.

As difficult as it was for busy, conscientious professional leaders to set aside time for monthly, intensive training seminars, participants valued the opportunities it afforded to

- make time for study and reflection
- learn to engage volunteer leaders in meaningful ways so their expertise could be maximized to enhance the agencies' effectiveness
- recognize that Jewish communal professionals across agencies, synagogues, organizations, disciplines, and state lines are in this enterprise together and creative solutions can result when trends and problems are examined with colleagues from all parts of the field
- examine ways for agencies, organizations, and synagogues to share limited resources, especially in areas of technology, marketing and public relations, and endowments and resource development
- bring Judaism into their own lives and the lives of their agencies

To quote two alumni surveyed: (1) "The

program helped us put our daily tasks into a larger context, giving them significance and meaning that often eludes us when we are distracted by the daily demands of budgets, program, paperwork and the like” and (2) “I gained a heightened awareness of my leadership responsibilities and now I am better able to encourage and nurture future leaders.”

As the Tri-State program matured, Gratz College has remained involved. A national institution of higher learning dedicated to training Jewish communal professionals and providing them with the technical tools and requisite Jewish knowledge to contribute fully to their communities, Gratz’s role in the Tri-State Jewish Professional Leadership Institute was a logical one from its inception. By 2002, the Institute’s leadership had begun discussions with Gratz’s administration concerning the possibility of a more formal connection with the college.

LEADING JEWISH AGENCIES

*“Do not separate yourself
from the community.”*

Pirkei Avot, 2:4

The majority of Jewish agency executives in the Philadelphia tri-state area have worked in the field of Jewish communal service for decades, many in the agencies they now lead. Eleven of these professionals were interviewed in the fall 2001 to winter 2002 to examine their experiences with professional development. Their reflections, some of which are presented below, focused on three major themes: leadership, mission, and training. In all instances, the importance of Jewish learning, language, and identity was addressed.

Leadership

A strong professional team is defined by the quest for excellence, the value of teamwork, the harnessing of spirit, and the ability to communicate a message of urgency and action.

- If the agency executive believes in professional education, then it is his or her responsibility to build an understanding within the volunteer community that professional enhancement needs to be protected, even under difficult campaign conditions.
- Senior professionals should serve as role models for their staff, valuing each person as an individual, involving them in decision-making, creating a sense of ownership, and encouraging candid communication.
- An executive’s most important contribution to professional development is defining and modeling passion, envisioning endless possibilities, and helping staff see what their role is in that vision. Passion is what keeps us going in this field and why we do what we do.

Mission

Significant attention needs to focus on defining the agency mission as well as the population served.

- Making professionals aware of the agency mission begins in the interview, and should be carried through in job descriptions, supervision, and performance evaluations. Creating an environment where staff feels cared for is critical to enabling them to be successful in creating strong, comfortable, and valued communities as they carry out their work.
- Professional leadership leads by setting the tone and transmitting a belief in the agency mission. Every member of the staff must be part of the agency plan. Since language is critical in raising awareness, the agency mission and Jewish values are posted throughout the building in an attempt to maintain the connection of our heritage, mission, and vision.
- The workplace is changing and how we do business is changing, and this will result in a radical restructuring in all fields. In order to enhance our service delivery system and promote a sharing of

resources, it will be necessary to change the culture of how we fulfill our mission. This will require an investment of time and resources in training professional leaders.

Training

Professionals need to be trained to make decisions in ways that will help them understand their complexities and analyze their multiple ramifications.

- Professional development should be far reaching and have lasting impact. Formal and informal education, such as missions to Israel, serve to create informed staffs and create ambassadors for local and overseas needs within our communities.
- In order for staff to carry out a mission, they must function as a team and be able to grow professionally. It is the responsibility of the executive to set this expectation and to provide staff with the time and opportunities for study and professional development, as well as for Jewish growth and celebration.
- Professionals would benefit from strategies such as case study analysis to help them capture the difficulty of issues, weigh the pluses and minuses of a situation, see potential allies, and keep the focus on what is best for the community.
- Advocating for staff training and development is one way to maximize the agency's potential. Executives should place a priority on serving as mentors and helping staff acquire skills for growth and advancement.
- There is a need for professionals to stay current in the Jewish communal field, as much as in any other profession. This is a society in which great change takes place as a matter of course. Regularly gathering people of like minds to share ideas, in addition to providing more formal study and training opportunities, will accrue to the benefit of the professional as well as to the Jewish communal system.

BUILDING PROFESSIONAL LEADERSHIP FOR THE FUTURE

If you will it, it is no dream

Theodore Hertzl

Over the last century, the Jewish community in America has built an extraordinary system of religious, cultural, educational, and service delivery agencies and organizations. The community, now more than ever, is aware that the vitality of institutions springs from the people who lead, not the walls that are built. As we plan for the future, we need to invest in the professions that will spiritually nourish, educate, engage, fund, and protect the health, welfare, and security of the American Jewish community.

In their article in the *Journal of Jewish Communal Service*, Larry Moses and Dana Sheanin (2001) emphasize the need for professional leaders to take responsibility for building the field of Jewish communal service:

We must stop playing divide-and-conquer on these and other issues. In the final analysis, we need to enlist a cadre of very visible and strong local professional leaders to champion the larger cause. We need to find a group with that courage, and with that vision. We need a cadre of professional leaders who, in addition to all of their other demanding responsibilities, will also stake their integrity on building these professions—senior leaders and younger leaders alike. Here (we) mean not a committee that meets a couple of times a year, but a group of driven pioneers who will not sleep well until this is done. Like all meaningful change, this will take a long time, and will require patience as well as determination...A final and larger premise is that building these professions is our work and not the work of volunteers.

The late Robert Forman, during his tenure as executive director of the Jewish Federation of Greater Philadelphia (1976–1991), often described the role of leadership by using the metaphor of an orchestra. The

warm, creative link between music and the musicians, which sounds seamless, is in fact an intricate blend of individual roles. When performing together, they rejuvenate the soul and enable the spirit to soar. To apply Bob Forman's metaphor to the field, each Jewish communal professional plays an important and distinct role. In the performance of their separate parts, like melody and harmony played in tandem, they create a whole that is all the more rich and beautiful.

Building a vision is beyond any one individual or agency. It can be shaped by the thinkers, leaders, and teachers in our field; it can be inspired by the rich heritage and texts

that we have inherited. But ultimately, communal vision is built by each and every one of us. The challenge is to begin the work.

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