

PURSUING EXCELLENCE IN JEWISH COMMUNAL POLICY, PROGRAM, AND PROFESSIONAL PRACTICE IN TIMES OF CHANGE

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At a time when the Jewish world is achieving historic successes, many professionals feel unsure about the future and doubt their ability to achieve excellence. This article presents ten challenges that professionals must confront if they are to pursue excellence in the communal enterprise. These ten challenges can be used as a checklist to evaluate one's professional practice.

The topic of this article is itself very revealing. Why was this subject—pursuing excellence—chosen for the keynote address to the Annual Conference of the Jewish Communal Service Association?

Indeed, some of us are questioning whether we can pursue or even expect to achieve excellence when we must constantly react to today's economic realities by focusing on cutback management and by then implementing or being subjected to the results of the downscaling of our operations. We tend to feel frustrated because we cannot control these events. We feel powerless to protect ourselves from these external economic factors. In addition, our field is now being affected by the fallout from the recent United Way crisis. At least for the immediate future, the repercussions from these revelations will, in many communities, influence lay-professional relationships and personnel practices.

Because of these developments and their resulting impact on our daily lives, many of us feel less and less good about what we are doing professionally. We are having to make very painful decisions and are frequently providing fewer services to our clients and members. And some of us are

concerned that too many of our existing services are not meeting our standards for quality.

I find it understandable but intriguing that we are expressing such concerns and doubts about our ability to achieve excellence at a time when, abroad, we are recording some of the major successes in modern Jewish history and when at home, we are achieving remarkable professional results within our agencies, despite limited resources.

We and the Israelis have now completed or are in the midst of several major rescue efforts. Since 1989, approximately 400,000 Jews from the former Soviet Union have emigrated to Israel and another 122,000 have come to the United States and Canada. In the United States, our Jewish community, with assistance from the government, assists these New Americans to find employment, learn English, and obtain housing. In addition, we make available Jewish and American acculturation activities and aid the immigrants with medical and mental health services. In Israel, despite the disappointing economic situation, all immigrants receive housing and health benefits and free education through the tenth grade. All adults have access to an ulpan class as well. Although we are understandably and properly impatient and disappointed that in Israel more has not been done to help the immigrants find suitable employment,

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we sometimes underestimate the task that Israel is facing. Israel's challenge is comparable to the United States absorbing about one-half of the entire population of France in only a little over 3 years!

Just one year ago, in one of the most incredible chapters in our history, 14,200 Ethiopian Jews were transported to Israel in approximately 36 hours. This effort clearly and dramatically reflected the effectiveness of the Israel-American Jewish community partnership.

And, as was recently revealed on the front page of the *New York Times*, Syrian Jewry may very well be rescued within the foreseeable future. There have been some encouraging developments in recent days, and over 150 Syrian Jews have arrived in Brooklyn during the past several weeks.

At least one other rescue effort may very well be launched within the next year.

No other generation of Jews has been so successful in protecting our own. What a remarkable record! And all of these rescue efforts are occurring while we are privileged to serve as Jewish communal professionals.

At home, there are also some encouraging developments.

- The Council of Jewish Federations (CJF) recently conducted a survey of salary increases in 1990, 1991, and 1992. Of approximately 50 federations representing all size communities in 1990 and 1991, more than half reported salary increases of approximately 5% or more per year. Although that percentage dropped this year, it is noteworthy that, despite the recession, salary increases in four of ten communities continued at the 5% or higher level. Most of the remaining federations reported increases for all 3 years in the 3%–4% level. For the most part, these federation salary trends are also reflective of those in the functional fields.
- Cutbacks and retrenchment, contrary to widespread perception, are only occurring in a few communities that are experiencing severe and unanticipated deficits. And in most of those areas, relatively

few people have lost their jobs. Instead, previously unfilled slots have remained unfilled.

- From 1986 to 1991, our annual campaigns have shown some moderately encouraging results. During that period, they have increased by 8½% to \$808 million. Although regrettably not keeping pace with inflation, this increase was achieved despite a severe recession and the impact of a successful second-line campaign—Operation Exodus—that raised an additional \$755 million as of December 31, 1991. To look at our campaign results from a different perspective, we are closing in on a \$1 billion Annual Campaign result, which I believe will be achieved soon after the recession recedes. That is a very remarkable indication of voluntary financial support for our programs and services!
- The total assets of our endowment programs now exceed \$2 billion.
- Practitioners across the country are responding with creativity, innovation, and resourcefulness to challenges in our communities—to AIDS, to single parents and their children, to older adults requiring very sophisticated community-based services, and to the absorption of new immigrants

One might legitimately ask, if there is so much good news, why do so many of us feel unsure about the immediate future and concerned about our ability to achieve excellence. I urgently believe that we need to put our historic successes and achievements in perspective and to acknowledge that external economic conditions are causing many of us to feel unsure and insecure about the future. We also must recognize that lay leaders are also increasingly affected by the scarcity of resources. They did not become involved in Jewish communal service to help fewer people. They too are frustrated by current conditions. In addition, some communities reported that, even before the recession, lay-professional relationships were becoming increasingly

tense. Will lay leaders during the next few years want to reduce overhead costs by employing fewer professionals? Will some of the salary and fringe benefit improvements we have fought for and achieved during the past several years be eroded? After the United Way debacle, are we entering a period when lay leaders will tend to micro-manage our federations and agencies?

All of us professionals entered Jewish communal service because we wanted to provide more and better services to children, families, and the older members of our community. We also want to assure Jewish continuity. Will we be the generation that presides over the diminution of our communities' capacity to achieve these objectives? Will the recession deepen, resulting not only in our reducing expenses by attrition but also by laying off professionals who are now currently employed?

These are some of the anxieties and questions that preoccupy us and lead many of us to conclude that, despite so many current successes, we will not be able to achieve excellence in our professional careers. I do not share this pessimistic assessment.

We are now in the midst of a period when the external circumstances described above are forcing us to reassess our priorities and to reexamine the fundamental missions of our communal agencies. In fact, the historic rationale for our communal infrastructure is now under review. If we can seize this moment and provide well-reasoned professional leadership, I am convinced that we can have a profound impact and move closer to the level of excellence we all urgently want to achieve.

Historically, it has been during such periods that fundamental change has occurred in our communal infrastructure. We need to determine whether we will only react to these external circumstances by adopting a defensive posture or whether we will lead with a vision and with courage and with firm convictions.

Does your agency or federation have a

vision or mission statement that is up to date and specific enough to help you provide such leadership? If not, there will be a tendency for you to react only as a fireman putting out the fires in your community.

This leadership challenge does not apply only to executives in our communal enterprise. Middle managers, beginning workers, and professionals in all functional fields and disciplines represented in our professional infrastructure—social workers, psychologists, fund raisers, lawyers, and others—have a part to play in this great human drama. We are like a great symphony orchestra. All of us must play in harmony if we are to achieve our potential and have the desired impact.

I propose ten challenges that we must confront if we are to pursue excellence in our communal enterprise.

RE-EMPHASIZE OUR MORAL OBJECTIVES

We in Jewish communal service are not in the business of selling dog food. Rather, we are in the business of pursuing a lofty and very significant mission—the saving and caring for tens of thousands of lives in North America, Israel, and 33 countries throughout the world, as well as assuring Jewish continuity. These are not just empty words; they reflect our profound commitment. Thousands of people can continue to be motivated to join us and to realize their potential if we present our mission in this way.

I would recommend that you institute a content analysis of your recent staff and board of director meetings. Do you consistently focus only, or primarily, on the immediate issues of the day, or do you regularly help lay leaders and professionals understand the broader mission and moral objectives of our communal enterprise? If we do not regularly use these meetings to so educate our voluntary and professional colleagues, we certainly cannot expect them to have a proper perspective on our very important mission.

SET HIGH STANDARDS

We must continue to set high standards and to fight for them, despite the clear tendency in our society to accept the second or third best alternative. We should set a benchmark for service, which should constantly be kept in mind and should provide the basis for evaluating what has been achieved. Sometimes we must compromise, particularly given the current circumstances, but we have a profound responsibility to remind the power centers in government that we should and could have done better. Our clients expect us to represent their interests in this manner.

SET PRIORITIES IN STRATEGIC PLANNING

Now is the time for sophisticated priority setting based on a professionally directed planning process. Strategic planning is an effective technique to employ to move in this direction. However, we must be certain that we do not become corner grocery store managers striving urgently to maintain the status quo. Too often, I regrettably hear us described in those terms. Are we capable, particularly during this unsettling period, of really leading the way in modifying the priorities that have guided our efforts in recent years? Are we prepared to provide such leadership if it means giving up or de-emphasizing some programs and/or services that have been so central to our practice in recent years?

In our New York strategic planning experience, it was important for staff to adapt our approach so that we did not move quickly toward consensus, but rather first helped both volunteers and professionals consider all options and possibilities, even if doing so resulted in significant differences of opinion. We must be secure enough to encourage an involvement in strategic planning that allows for such an unrestricted exchange of views. It is only through such an open and far-ranging dialogue that we can achieve the desired objectives in a strategic planning process.

MAINTAIN A BALANCED PERSPECTIVE

We must always remember that we are on a winning team. Despite our current serious problems, we have achieved so much during the past 45 years at home, in Israel, and throughout the Jewish world. Just imagine how profoundly different the Jewish experience would have been in the 20th century if in 1932 the Jewish world would have been operating as effectively as we do today.

We must keep this perspective in mind as we strive for excellence today. We have a tendency to focus only on our problems, on the bad news. Although we must face our dilemmas honestly and directly, we should constantly remember that we are confronting our current agenda from a position of strength. We and our predecessors have established a remarkable communal foundation from which to confront the challenges of the mid-1990s and the early 21st century.

MAINTAIN OUR COMMITMENT TO INTERNATIONAL AND NATIONAL NEEDS

Between 1987 and 1990, while the overall amount raised by federations increased by 4.8%, allocations to UJA decreased by 7.9%, allocations to national agencies decreased by 33%, and allocations for local needs *increased* by 18.7%. Clearly, fund raising is not keeping up with our needs, and when short of funds, communities are placing priority on meeting local needs at the expense of the national, international, and Israel-based infrastructures. A complex series of factors are influencing these allocation decisions, including the reality that program and service shortcomings are much more visible in one's own community. There is also significant dissatisfaction with the inefficiency and bureaucratic structures of some of our national and international agencies. However, we cannot achieve excellence if we are going to short-change programs and services outside of our own communities. If these trends continue, we

will fundamentally weaken our extraordinarily impressive capacity to operate as a continental entity and to help Israel integrate effectively the thousands of refugees who are arriving at Ben Gurion Airport each month.

How much emphasis is your community placing on sensitizing both your staff and lay leaders to our global agenda? Have you personally taken advantage of opportunities to familiarize yourself with the Jewish world beyond the four walls of your own agency—by reading Jewish publications, by going on missions when they are available to you, and by taking advantage of contacts with national and international leaders when they are in your community? In short, are you doing your part to help your community understand its broader responsibilities and to maintain a proper balance in its allocation processes, despite the urgent service imperatives we face at home each day?

ENHANCE AGENCY INVOLVEMENT IN RESOURCE DEVELOPMENT

The annual campaign in each community is now facing formidable challenges from other Jewish and non-Jewish fund-raising efforts. There is more and more interest in designated giving. And the impacts of the recession exacerbate each of these trends.

Each of us, whether we are employed by a federation or an agency, has a stake in the success of all of our community's fund-raising efforts—the annual campaign, Operation Exodus, planned giving and endowment, and capital campaigns, if they exist.

After having spent the last 13 years as a federation executive in Baltimore and New York City, I am convinced that we do a very inadequate job of marketing the services that we provide to our constituents. When major and new contributors personally experience the efforts being made in our family agencies, Jewish Community Centers, and vocational agencies and by the Jewish educational infrastructure, they,

more times than not, begin to make quality gifts. We need to enlist more fully the assistance of the agencies in our fund-raising efforts. Doing so requires agency professionals and lay leaders to respond positively when asked to help interpret our needs to our donors and to become leaders in the community campaigns.

We must be very careful that we do not evolve into two communities—the fund raisers and the fund spenders.

ADDRESS PERSONNEL PROBLEMS MORE EFFECTIVELY

One of our most valuable assets is our professional and support staff. Approximately 70% of our operating budgets finances our personnel. To achieve a higher level of excellence, we must address more effectively these serious personnel problems.

- Entry-level salaries in federations have remained at the \$25,000–\$30,000 level (for trained masters-level people) for at least 4 years. This is in part a reflection of the economy, but it is a deterrent to recruitment since we are falling behind such professions as teaching and government service. Low entry-level salaries pose even more of a problem in some of the functional fields.
- In too many cases, our middle managers are not well trained in administration or supervision. Yet, they often play decisive roles in the development of some of our finest young people.

Schools of social work and we in practice have not satisfactorily confronted this challenge. This is a significant frustration for me. I often feel that we hope this problem of inadequate managerial and supervisory skills will disappear. Of course, it will not. We are doing a disservice to our field by underestimating the impact of this deficiency on our personnel development.

- Particularly in our larger functional agencies and federations, there are significant communication problems between top

management and middle managers and line staff. Poor communication is probably the problem most frequently mentioned by the participants in the course on personnel management in CJF's Continuing Education Program that I have taught for the past several years. It is profoundly affecting our ability to realize our potential.

We need to put much more emphasis on encouraging staff to manage up and on convincing communal service executives to be more receptive to these messages.

- Stress has become a constant reality in the professional lives of so many communal workers. I frequently hear such statements as the following:
 - "I keep striving for unobtainable goals."
 - "Faxes and E Mail have certainly made us more efficient, but the quick turnaround time is driving me crazy."
 - "I am operating in a constant crisis mentality."
 - "Burnout has become a real possibility."
 - "I constantly have to rush. I do not have time to think or to process vital decisions."

Obviously, a stressful atmosphere inhibits our efforts to strive for excellence. Work-related stress is a subject that we discuss constantly, but generally do not confront.

Clearly, we can address our personnel problems more adequately. We must place a higher priority on improving the atmosphere in the workplace. Since addressing personnel problems has financial and policy implications, we must involve lay leaders in helping us deal with these significant personnel management challenges!

IMPROVE INTERGROUP RELATIONS

We are *not an island* unto ourselves. Our ambitions and complicated agenda have tended to cause us to be totally preoccupied with our own issues. We no longer seem,

in most cases, to put a priority on improving our working relationships with other ethnic and religious groups. For example, do you know your colleagues in the black, Hispanic, Catholic, and Protestant communities? As the recent riots in Los Angeles indicate, we are all going to be adversely affected by the lack of a satisfactory program of urban aid. In addition, we urgently need partners if we are going to minimize the damage caused by constant cutbacks in government funding.

We cannot delegate the responsibility of strengthening intergroup relationships to our Jewish community relations councils. Even if some of us 1960s liberals are a little tired and discouraged, we must persevere in reaching out to others.

IMPROVE THE AGENCY-FEDERATION RELATIONSHIP

The partnership between federations and agencies must be updated in light of the change in the pattern of training professionals that has occurred in recent years. Some 20 to 30 years ago, most federation professionals came to federation with prior agency experience, and most federation lay leaders came from the agency system. That is less and less the case today. Too few federation professional and lay leaders have a sufficient feel for the agency realities, and vice versa. Much more attention must be devoted to establishing a higher level of mutual understanding if this partnership is to maintain its vitality into the 21st century.

The findings of our 1990 CJF National Jewish Population Survey will mandate fundamental changes in our communal priorities. Efforts to assure Jewish continuity will require significantly more resources.

Particularly in our older communities, agency structures were developed in the immediate post-World War II period and have not been fundamentally updated since then. We will need to have the vision and courage to make some very basic modifica-

tions in these systems that we have taken for granted for many years. Agencies and federations will need to work together courageously to achieve some major realignments if we are to meet our communal responsibilities.

STRENGTHEN THE LAY-PROFESSIONAL PARTNERSHIP

The combination of lay and professional resources, when working in a well-coordinated way, is a major reason why our communal enterprise has been so successful. Yet, our lay-professional relationships require attention. They are in flux and frequently suffer from inattention; in too many cases, they are in disrepair.

I am constantly hearing from both professionals and laypersons that, in many instances, the lay-professional partnership really exists in name only. There are problems concerning mutual respect and the sharing of power. There is increasing anxiety that our overhead costs are growing too rapidly and that staff are not sensitive enough to these financial issues. Questions focusing on staff productivity are also surfacing more frequently.

Maximizing the effectiveness of the lay-professional partnership is difficult. Yet, most staff who are expected to engage in these types of relationships have received little, if any, training concerning them. Unless we modify our current priorities, we can expect a minimum of assistance in the immediate future in strengthening these relationships.

If serious attention is not given to enhancing the lay-professional partnership, our quest for excellence will be certainly hindered. I am pleased that CJF has begun to give priority to this issue. Shortly, six past and current federation presidents and six federation executives will participate in a 4-day think tank on fundamental issues underlying the lay-professional relationship. I hope this experiment will stimulate more direct and frank lay-professional dialogue,

which will be the best way to confront these vital matters. We must work through these issues *with* lay leaders, not just in professional meetings.

I hope that other functional fields are also conducting such dialogues. It is my expectation that a series of papers on this subject will emerge and that eventually we will develop mutually agreed-upon guidelines and standards that will strengthen these relationships.

CONCLUSION

We must confront and respond to these ten challenges in a satisfactory manner if we are to pursue excellence in times of change. If we confront them with courage, integrity, intelligence, and sound professional judgment, we can make significant progress. I hope you will use these ten challenges as a checklist by which you evaluate your own practice.

There is a story in the Talmud about the confrontation of Alexander the Great with nine rabbis. One of the questions he asked them was, "Who is called wise?" And the rabbis responded, "Who is wise? He who discerns what is about to come to pass."

The rabbis of old were not fortune tellers. Rather, they had a very good sense of Jewish history and knew that it has to be measured in terms of the long run. I think that we too, in charting our course for the future, will be able to reflect the wisdom of the rabbis. They had confidence in what the Jewish people had accomplished in the past and looked forward, not naively, but with the knowledge of the ages to a future characterized by continuity, excellence, and adherence to our value system. We can do no less.

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