

# PERFORMING AN EVOLVING ROLE: AN EXECUTIVE'S CHALLENGE

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**I**t is more than two decades since a visionary proclaimed that civilization had created a global village. In the ensuing years, we have witnessed and been beneficiaries of continuous advances in information and communications technology that would have seemed impossible science fiction two generations ago.

Through these fast paced advances, we are daily brought closer to the realities and causes of human suffering and social decay. One would have to cease reading newspapers, listening to radios, and watching television to avoid the omnipresent dazzling, yet maddening, phenomena. But, sealing the senses would not slow the pace, it would only yield a brief respite.

The signs of fraying social fabric appear daily: tax revolts, high officials breaking the law, suspension of the most elementary business ethics by many, acceptance by large numbers of fellow citizens of hunger, homelessness, deteriorated schools, worsening environments and more.

The Jewish world also is changing. For a generation, social scientists and rabbis have noted weakening affiliation patterns, rapidly increasing intermarriage, and declining family commitment to Jewish education for many of our children. Jewish unity in America has, in recent years, become less binding and more tenuous as external threats diminish and Israeli political decisions become harder to understand or accept. Distance in time

from the Holocaust has weakened the emotional impact of this singularly dark reality for too many Jews. And ideological differences within Jewry have become sharper and more politicized than at any time in memory.

Against this dark backdrop are many counterpoints of light. In cities, states and nations, a new political debate is underway. Citizens campaign for various offices who are genuinely motivated by a vision of a better society. And, within the Jewish community, while large numbers of our people act like the majority in the larger culture, many have rededicated themselves to the practice of Judaism, and there are signs of dynamic and innovative endeavor in all aspects of contemporary Jewish life: faith, education, community relations, Israeli society, Jewish arts, culture, and literature, among others.

No organization that seeks popular legitimization and support can survive this sea change for long without undergoing its own change. Federations have served the largest groups of Jews living in North America for over three generations. In the last two decades, Federations emerged as the most potent organizations of Jewish community life, working with but often surpassing synagogues as the institution to which the greatest number of Jews in any given area belong, to which they contribute, or from which they expect service.

Today, in many parts of North American Jewish life, Federation leaders have begun to question the future with an eye towards transforming their organization to better respond to and serve the changing needs of the Jewish and American community.

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This present quest is aimed beyond the new decade ahead toward the challenges of the twenty-first century.

In this context, the role of the large city Federation executive has been undergoing a gradual yet profound transformation. Heightened expectations of lay leadership and rapid social changes make the guidance that executives traditionally obtained from training in social welfare seem necessary but terribly insufficient.

Federation executives seek clearer definitions. Recent national efforts to assist in defining the role of the Federation executive have taken inadequate account of the growing complexity of the contemporary Federations and therefore of the requirements of its chief executive/chief professional officer. In the midst of this confusion, leadership is needed if executives are to fulfill effectively the community trust.

Between 1976 and the present, there have been several efforts to describe and examine roles. In these efforts there has been a creeping identification with the role of the for-profit corporation chief executive officer and, on occasion, reference to the university president. While there is a study of excellence in non-profit management currently underway, there is inadequate literature on non-profit corporation management presently available to provide guideposts or criteria, let alone definitions of roles of Federation executives.

In an effort to define the challenge to the contemporary executive of a major Federation, it is necessary to examine closely the features of the evolving Federation.

#### THE EVOLVING FEDERATION

Response to these complex times is diverse. Overwhelming numbers of Jews react in ways that suggest alienation at worst, lack of familiarity with vital Jewish matters at best. Yet, people do seek answers, shelter, and comfort among family, friends and accessible institutions. Two principal institutions of American Jewish

life are synagogues and Federations. A current common behavior in consumer society is affecting belonging to, involvement in and allegiance to synagogues. The same normative behavior pattern affects Federation even more. Federations often suffer from perceived inaccessibility.

While the agenda and financial resources of Federations have grown dramatically in recent years, the numbers of givers have stabilized or declined. If they were fully effective, Federations could dramatically expand involvement and numbers of givers, thereby expanding financial resources further and enabling more needs to be met. Increasing access is not a simple matter of public relations. Rather, a careful and persuasive restatement (and redirection) of the Federation mission must be conveyed broadly in ways that will attract and develop commitment.

In the last decades, virtually all aspects of the world Jewish agenda have come to touch Federations. Beyond support for our traditional service agencies, the community relations, political, and ideological community issues have become the Federation concern. Federations increasingly can be described as nerve centers in the midst of a dynamic network of voluntary associations, synagogues, organizations and service agencies. In this construct, Federations have come to provide a framework for organized Jewish life. Federations have developed this role progressively, their leaders providing leadership, statesmanship and diplomacy to build organized Jewish community life. But the excitement of being at center stage is lost to many who haven't heard of the theatre (let alone have tickets).

On the one hand, thousands of deeply committed and involved volunteers spend hundreds of hours in committees, analyzing issues and discussing alternative solutions. These people experience the full meaningful impact of performing Jewish services on the main stage, and they are afforded a sense of personal Jewish benefit—they properly feel as though they influence Jewish life. For these “few” the

importance of their work and its impact are palpable. In response to confusing and maddening events that may cause others to withdraw, these leaders and workers actively engage in policy and decision-making, and fund-raising to further the institutional goals of the Federation. For these folks, Federation is totally accessible and malleable. On the other hand, current demographic research suggests that this immersion is not desired by most. Access to information and data, appropriately packaged and available, is sufficient for the "consumer-oriented" majority.<sup>1</sup>

Federation's mission has expanded well beyond that which was taken for granted prior to the mid 1970's. But Federation executives have lacked rigor in laying this out for themselves to focus on what these changes in organization mission mean for them. As some have rushed to borrow the most obvious aspects of the roles of for-profit corporation chief executives or university presidents, have they done themselves a disservice? For while it is essential to increase the businesslike conduct of the operations of Federations, thereby increasing executive credibility among very demanding lay leadership, to project only that executives operate a social welfare "business" like a business is a woefully inadequate statement of what Federation executives are becoming.

What can compel a volunteer to associate with the executive who is unable to transmit that essential and unique quality of the contemporary Federation mission, that is, to serve as a builder of the Jewish community? When a lay leader has busily engaged in developing a professional practice or business for 50, 60, or 70 hours per week, why should he or she give precious time away from family and business to a voluntary enterprise if its only claim is

that it is operated in a businesslike fashion or that its campaign—like that of a sales organization—should raise more money than the year before? Rather, Federation professionals need to focus increasingly on the sense of personal Jewish benefit available to the individual volunteer that would warrant active engagement in the work of the local Federation.

How can involvement in organized Jewish life benefit an individual personally? First, there is the basic level at which the individual participant enjoys, learns from and connects with a network of similarly motivated and involved volunteers. Involvement in the work of Federation enables them to meet a personal objective, whether they are seeking to expand their social or business contacts or simply exercising some defined sense of commitment to serve. Some may want only to contribute money and read about all the good that is done with Federation contributions. Others may have talent and personal resources to contribute, e.g. modernizing and maintaining the administrative aspects of the Federation. Some may have technical expertise that would benefit planning either for domestic services or for overseas programs. Others may want to teach or lecture, and they have an opportunity to do so through the many human resource development functions of Federation and its agencies. Finally, some may have a talent for leadership and aspire to lend that leadership to the Federation and its agencies and to organized Jewish life. Federation needs to project its myriad opportunities for a volunteer to contribute time, talent and treasure, and thereby satisfy his or her particular personal motivations.

Executives are continuously driven to earn the respect of the broadest numbers and continually to transmit the basic credibility of the Federation cause and its vital importance to the well being of individual Jews who live in Federation areas. The process of doing so projects the characteristics of the Federation, including its

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1. Gary Tobin, "We Are One, We Are Many: Reaching Potential Givers," lecture, Brandeis University, Center for Modern Jewish Studies, October 19, 1987.

responsibility for the basic needs of Jews within the community, its continuity as an institution of Jewish life, the caliber of its leadership, the influence of peers, and the establishment and maintenance of respectable standards. So doing makes possible the continuous growth of the dollars raised and the development of more donors. But beyond this, the Federations in recent years have moved beyond the traditional social welfare model of a consortium of agencies and has become an important player in the enrichment of Jewish life in the communities. This function is becoming a fundamental objective of Federation and it, in turn, flows from the appropriate conduct of its business. Because of this new element of its mission, the drive to expand its total resources has grown and gains in persuasiveness.

The Federation needs, therefore, to project itself in new ways, but remains always attentive to this basic objective of enriching Jewish life. To be successful, the Federation process must raise the level of an individual's knowledge of Jewish programs, increase participation in those programs, broaden peoples' Jewish perspective, and strengthen their identification with the total Jewish community. Federation is, after all, striving to create an instrument through which Jews can address the broadest number of agreed upon issues in concert.

In this writer's view, the essential mission of the Federation can be summarized simply:

1. Federation sits in the center of the organized Jewish community. Federation should widen the circle of inclusiveness, of people and programs.
2. Federation should serve as an instrument of Jewish identification and be the institution with which increasing numbers of Jews will associate.
3. Federation should serve to deepen the quality of Jewish life and the quality of life of the Jewish population. To do so, Federation must move forward in areas of Jewish culture and spiritual programs

while maintaining a high level of basic services necessary for the health, welfare and security of the community.

4. Federation should strive to find the consensus (in the sense of *Klal Yisrael*) on basic issues while respecting diverse attitudes and ideologies, developing a greater stake in community among a greater number.

5. Federation should increasingly be the Jewish "address" vis-à-vis the general body politic.<sup>2</sup>

#### TOWARD A CONTEMPORARY JOB DEFINITION

The Federation executives' role is fundamentally two fold, that of leader and manager. As leaders, they are charged with serving as the prime agent of change. They shall ultimately be judged as to their effectiveness or success by whether the Federations they serve continue to evolve and grow in the discharge of their traditional and new responsibilities. And they may be judged failures if they bow to a bad dream of their organizational effectiveness eroding, succumbing to the increasing challenges of internecine strife within the Jewish world and the external allures of an open society. As change agents or leaders, they must continuously remind themselves that they are not the sole authorities (which, to some extent, the CEO of the for-profit organization is) but are rather important and essential for the making of intelligent judgments that further the chain of Jewish continuity.

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2. Thanks to William Avrunin, two of whose papers have been very important in shaping the writer's thinking and practice as a Federation executive. These papers are, "Can the Future of Federation Be Shaped by the Jewish Community Organization Process and a Grand Design?" *Journal of Jewish Communal Service*, Winter, 1976; and "Philosophy, Principles and Practice in Federation Operations," a monograph distributed by the Jewish Welfare Federation of Detroit, September, 1986.

There are some very practical aspects of the executives' role. *First*, they must always be engaged in understanding the worlds around them, both the megatrends affecting western society, world Jewish concerns, and the more micro aspects of the dynamics of the local communities in which Federations sit, and the changing capabilities and demands of the organizations they administer. This is probably the single most important criterion for serving well as a Federation executive. I would not use so lofty a term as "philosopher king" to describe it; perhaps "student-activist" is more appropriate.

*Secondly*, as the nature of the organizations and the communities executives lead become more complex and as the definition of responsibilities held by Federations broadens, then executives will have to strive for a balance between their own inside role of shaping and managing the corporate culture in which they live and the "outside" role of identifying, recruiting, educating, and nurturing the lay leadership who will help to lead organizations and communities in the years ahead.

*Third*, among these first priorities must be included, the identification, recruiting and shaping of senior associates who will form management teams or executive staffs. These associates, some of whom will become tomorrow's Federation chief executives, may be drawn from outside the Federation movement or from within — but all will need to be molded. At their most effective, these will be bright, engaging and talented professionals who will stimulate executives' growth and learning through "supervision up." But they in turn will be the essential troops who will spread the authentic concepts and practices of how the Federation will navigate these confusing times, by the "hands-on" nurture they provide to emerging lay leaders who'll serve as tomorrow's chairs and presidents.

*Finally*, there is a very practical regimen to the function of the executive. More often

than not, one functions as "fire chief in residence." No matter how smoothly the organization operates, there are the daily crises, the need for associates and staff, agency executives, rabbis, synagogue presidents, journalists, volunteers and leaders to be in touch with the executive of the Federation about a looming emergency or an ongoing irritant. Sometimes, with the best of intention, the Federation process is inadequately attentive to the genuine needs of other organizations and leadership in the community, and that's where conflicts can arise. The intervention of the executive may be very brief where he functions as statesman. Sometimes a decision is required or the right words need to be said to cool heated feelings and to enable progress to be made. At other times still, it is necessary to organize the right blend of volunteers and professional staff in a committee or task force to study the emerging problem and to make recommendations for improved operations in the future. Every executive must be prepared to afford a substantial portion of his day and week to "putting out fires."

The chief executives/professionals will have to spend an increased amount of their time in community affairs. This may include participation in local United Way, or special groupings related to the major organizational executives, various civic associations, governmental bodies, and ecumenical endeavors. Insofar as we see a key role of chief executive in any organization — for- or not-for-profit — as being that of spokesman and leader, then Federation executives too have to actively perform in such a role. It is not sufficient to issue press releases. Effective communication happens when executives or chief volunteers can see and be seen in various arenas. Executives must remember that they are projecting the corporate interest of organized Jewish life in these activities.

How do we judge which activities are important? Among the questions executives may ask themselves is: will my

participation in this activity advance any of the basic functional objectives of the federation, i.e., (1) financial resources development; (2) community planning; (3) business administration of the service system; (4) community development; (5) community relations?

- Will the executive's active participation in representing the Federation (and through it the organized Jewish community) open doors to garner more revenue?

- Supplement planning knowledge?

- Create opportunity for collaboration with other helpful institutions?

- Project Jewish concern about social needs or civic concerns of our day?

- Contribute to attracting to Federation Jewish laymen who are not presently involved in its work?

Executives must ask — as a “litmus test” — would my participation in any such activity detract from broad scale allegiance of Jews? Will it make them proud to see their Federation representing organized Jewish opinion? Will it unlock doors to individuals who have not heretofore seen the Federation in this role and who might respond more favorably when next approached to contribute time, effort, leadership or treasure to the fulfillment of the mission of the Federation?

#### A CONTINUING EVOLUTION

We both shape and are shaped by our environment. Federation executives must spend so much time at their jobs, that they are shaped by while shaping the

nature of the contemporary Federation. But the dominant social, cultural and demographic trends of the general society and of Jewish life have an even more profound impact on the nature of the evolving Federation. And as we recognize the evolving nature of Federation, so must we recognize that the executives' roles, too, are continuously evolving.

To discharge these roles effectively, there must be an expanding and continuously upgraded Jewish knowledge base. Executives need to go beyond an ability to give a *D'Var Torah*, to understand the evolution of Jewish traditions and laws. They need to treat with sensitivity the emerging (and sometimes conflictual) streams of contemporary Jewish life and expression. Social welfare administration becomes increasingly complex even as does the nature of our society; so must Federation executives remain rooted in the tenets of this profession. Finally, to demonstrate credibility to emerging lay leadership, they must also upgrade their business administration skills.

In sum, Federation executives are charged with being simultaneously leaders of Jewish communities, social architects who design the communities' future, and managers of the organizational systems which enable them to institutionalize their gains, correct their weaknesses, take advantage of emerging opportunities, serve the client populations, and convey a sense of wholeness and personal benefit to the Jewish people.