

VOLUNTEER-PROFESSIONAL RELATIONS

Intersecting Spheres of Influence

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Today's executives and presidents are different from their predecessors, and they are operating in a changed environment. So many of the premises underlying lay-professional relationships for the past fifty years require significant modifications. The sharing of power, particularly in terms of access to information and the expectation of the executive to provide leadership and a vision for the organization, is a key issue. A mentoring system, as well as research and continuing education relating to lay-professional relations, is urgently needed.

For decades, the effectiveness of the Jewish communal system has depended on a mutually satisfactory relationship between the executive/professional and volunteer/lay leaders. In recent years, as our organizations have responded to complex external circumstances, increasing stress has been placed on both the volunteers and the professionals. Expectations have changed, and frequently the resulting tensions have made it more difficult for these organizations to meet their basic responsibilities. This trend has been evident particularly within the federation system and is most clearly exemplified in the president-executive relationship. Although we focus primarily on this relationship in this article, it is important to note that the issues and problems that we analyze are also reflected in the volunteer-professional relationship throughout the system.

Until recently, discussion of the lay-professional relationship did not involve a dialogue between lay and professional leaders. Each group tended to talk among themselves. One of the most encouraging recent developments has been an increasing tendency for this issue to be discussed between the two principals: the volunteer and the

professional. Under the aegis of the Council of Jewish Federations (CJF), over the past two years we have held a series of meetings with the presidents and executives of the large city federations in North America to identify the issues, analyze the problems, and develop recommendations for the system. This has proven to be a most useful series of meetings and will be continued this year with presidents and executives from intermediate-level cities.

TODAY'S LAY LEADER

From these discussions have emerged profiles of the president and of the executive today. Today's lay leaders are often more sophisticated and better educated than their predecessors. By the time they emerge as presidents or chairs of their federations, they tend to be very experienced in the volunteer enterprise. They have matured in an environment where they have had unprecedented choices of the focus of their voluntary efforts. They now have opportunities to become leaders not only in the sectarian sector but also in communal institutions previously closed to earlier generations, such as museums, symphony orchestras, hospitals, and universities. Therefore, those

choosing to express their volunteerism within the Jewish community seem to be more motivated to connect with Jewish organizations. The new Jewish communal volunteers are inclined to be more educated in Jewish traditions and history, often resonate to Jewish values, and are concerned with the future of Judaism. They are likely to have visited Israel numerous times and to be more knowledgeable and engaged in the issues confronting the international Jewish community than many of their predecessors. They expect the professional to be a Jewish role model and to be at least as well educated and as knowledgeable about the issues confronting the local, national, and international Jewish world as they are.

Many of today's Jewish leaders are entrepreneurs and decision makers in their businesses, and they generally control the outcomes of their work. They are accustomed to working with the best and brightest and often are intolerant of weaknesses. They also tend to be politically astute. Many see themselves as equals to the professionals. They believe and at times may indeed have a keener understanding than the professionals of such financial issues as maximizing investments, cash flow, lines of credit, and tax issues. The reluctance of many of these volunteer leaders to defer to professionals on these complicated issues has been intensified by the recent management problems of the United Way and some federation systems. In addition, volunteers are likely to be using the latest technology in their businesses and may be frustrated by the inability of some Jewish communal organizations to provide them with sophisticated and timely information.

Because some lay leaders perceive that they have greater skill or knowledge of managing complex organizations than the professional, they may be inclined to see themselves as the chief executive officer of the organization and to treat the executive as their chief operating officer and other professionals as their employees.

Other volunteer leaders with similar

backgrounds and experience are functioning in a very different way. They are prepared to give the professionals more autonomy, to allow them to take risks and make mistakes. Yet, they then hold the professional accountable for their actions, and this accountability is often reflected in their performance reviews and compensation decisions. These lay leaders place an emphasis on refraining from any micromanaging. They are concerned that we have created a culture in which professionals essentially are not allowed to make decisions without lay input. They emphasize that lay leaders must step back and allow the professionals to run the organizations.

TODAY'S PROFESSIONAL

For professionals, these different approaches to the lay-professional relationship create additional tensions and a sense of vulnerability and ambiguity.

Professionals of today tend to have different and arguably better training than their predecessors. Particularly in the federation field, the executives are often graduates of schools of Jewish communal service and thus have sophisticated Jewish backgrounds and graduate-level training in community organization. When they assume their executive positions, they are frequently younger on average than the prior generation of professionals and have young or school-aged children. They tend to be confronting critically important parenting issues at the same time that they are directing major communal enterprises. They are attempting to strengthen communities in a much more potentially contentious atmosphere than existed fifteen years ago. Because of the size of their operations and the changing legal environment, executives frequently are more aware of their fiduciary responsibilities and consequently want to operate their federations on a more business-like basis.

Many executives work sixty or more hours per week and are under intense pressure. Increasing numbers are experiencing

periods of insecurity because of the recent hirings and firings and early retirement patterns in Jewish communal service. More and more executives tend to be conflicted about their futures as Jewish communal professionals. Although they find their work to be rewarding, both personally and professionally, they must deal simultaneously with many employment pressures and quality-of-life issues.

THE CHANGING CONTEXT FOR THE LAY-PROFESSIONAL RELATIONSHIP

In preparation for our discussions, we carefully considered these emerging profiles of the lay leader and the professional, particularly as they described today's federation president and executive. We quickly realized that the lay-professional relationship is very much affected by changing conditions in our communities and in our national and international environment, particularly the impact of campaigns that are experiencing minimal growth, cutbacks in government support for human services, and the changing relationships with the state of Israel. Volunteer-professional relationships will continue to be affected by these factors as we begin to enter the post-rescue period, the years when hopefully the saving of refugees will not be so central to our mission.

From a historical perspective, many of the premises that have been the foundation of our federated approach and our lay-professional relationships for some fifty years require fundamental modifications. This places added pressure and stress on both volunteers and professionals because we must operate in an environment where the understandings that have guided us for so many years are undergoing the most significant changes in decades.

PREMISES UNDERLYING AN EFFECTIVE LAY-PROFESSIONAL RELATIONSHIP

In the series of meetings we have conducted, several issues and premises emerged repeatedly.

We all recognized that a satisfactory relationship between a lay leader and a communal professional does not develop by osmosis or automatically. Both the executive and the president must concentrate on building and strengthening such a relationship.

Interestingly and significantly, few opportunities exist for sophisticated or sustained training for either the professional or the lay leader, either separately or together. This is a deficiency that should be corrected quickly.

It also became clear that we need to conduct more research on the lay-professional relationship and to disseminate the findings on a systematic basis.

We should understand that the sharing of power has a critical impact on the relationship between presidents and executives. Information has been and is a source of power. Many presidents have become impatient with the control of the flow of information from the executives. The presidents feel that their lack of access to information makes them unable to be true partners, limiting their ability to set the communal agenda and to give leadership to critical issues in Jewish life.

There was also a consensus that some limits must be established on the power of each partner in the relationship and that specific responsibilities must be defined more precisely. More clarity needs to be developed on these issues: Who is the leader and on which issues? Is it always the same person, or can the executive and president have the final say at different times on different issues? Who is the boss? Who should be the spokesperson? These questions need to be discussed more precisely in defining the respective roles of the executive and the president and in determining how power is shared. In this context, it is important for the executive and the president to discuss and understand each other's communal and personal agendas. Guidelines need to be developed to assist the president and the executive as they share power.

When considering the power-sharing is-

sues, we must also remember that increasingly more and more volunteers expect the executive to provide leadership and a vision for the future of the organization. This desire for the professional to be a leader can create more tension since, at the same time, the volunteer often does not want to be overshadowed by the professional. In many cases, the organization will need to accommodate two leaders simultaneously, each defining for the other his or her individual expectations.

Our dialogue also focused on clarifying in what ways and in what settings the chief voluntary officer and the chief professional officer can disagree. In this context, it was emphasized that presidents and executives should operate on a basis of mutual trust with no surprises. It is essential that they respect one another and their partner's experience and expertise. The president should recognize that the executive's role is to provide continuity and a communal perspective. At the same time, the executive must create opportunities for the president to bring his or her creativity and vision into the communal enterprise.

The executive and the president should adjust to each other's personalities and styles. It is primarily the responsibility of the executive to adapt to the personality and style of the president, which may differ from his or her predecessor and/or successor.

Throughout our dialogues, emphasis was placed both by the president and by the executive on the importance of receiving assistance at transition points, such as when a new president or executive is assuming responsibilities. More attention also needs to be placed on how to end presidential administrations most responsibly. Specific reference was made to the desirability of more systematic debriefings and guidance, particularly to help the chief volunteer officer "let go" at the end of his or her administration.

The need for a more thoughtful performance review process for the executive was another important theme that emerged from

our dialogues. The increasing need of presidents to ensure accountability has resulted in their becoming more involved in performance review and compensation issues. There was a sense that the criteria for the performance assessment of executives are ill defined or, in certain cases, nonexistent. More understanding needs to develop regarding the specific relationship between performance assessment and compensation determination. In addition, both executives and presidents urged that attention be paid to learning how to respond from a public relations perspective to executive compensation, particularly since this issue tends to be more public than was the case in previous decades.

A frequent theme emerging from our lay-professional dialogues was the need to use a mentoring system that would enable former presidents to be mentors to new presidents. Such a system would help new presidents assume their responsibilities more quickly and effectively. Yet, caution was raised that a former president may have biases and that careful thought must be given to the choice of mentor.

In subsequent discussions with some federation senior executive staff, concern was expressed that we do not focus sufficiently on the value-added component in determining which lay leaders are given which assignments. Too often, lay leaders are assigned to specific committees or boards to ensure their involvement, rather than because that is where there is the potential for them to make a significant contribution.

GUIDELINES FOR AN EFFECTIVE LAY-PROFESSIONAL RELATIONSHIP

The following six guidelines need to be followed in developing a good volunteer-professional relationship:

1. *Emphasis must be placed on developing a high degree of mutual trust. In order to create this element of trust, a "no surprises," full disclosure method of operation must exist. Candor must pre-*

vail at all times, and the president and executive each need to define and create realistic expectations for the other.

2. *Priority should be placed on the executive helping the president optimize his or her skills and experience.* This guideline is based on the assumption that the president has helped the executive become familiar with his or her strengths and prior professional and voluntary experience.
3. *The president and executive must always remember that they are representatives of a Jewish community and that they are not private entrepreneurs.* For them to function in this manner, an officers group, executive committee, and/or other mechanism must exist to which they can report and consult on a regular basis.
4. *At all times, the president and executive need to be guided by their ultimate objective: to build and maintain as strong and as vital a Jewish community as possible.*
5. *A sound president-executive relationship is always characterized by an element of creative tension.* Each person brings his or her own expertise to the position. Each ultimately must be committed to achieving excellence and to maintaining the highest possible standards. As they each strive to achieve these objectives, often under difficult circumstances, some tension should be anticipated. The challenge is to ensure that it is constructive.
6. *The president-executive agenda must give priority to providing leadership in the development of a strategic perspective that enables a community not just to focus on the day-to-day issues but also to plan for the next five to ten years and to give leadership nationally and internationally as well.* To achieve this objective, it is expected that both the president and the executive will have well-defined values, goals, and objectives and a vision of what they want their community to become during the

next decade. It is also anticipated that the president and the executive should be able to function both as leaders and managers, depending upon the circumstances at any point in time.

We urgently recommend that further consideration be given to how external changing conditions and pressures affect the executives' and other key staff's willingness to take risks and to give leadership in this difficult environment. This could become a very serious problem if they become too conservative and defensive during an era when executives are expected to manage change and to provide leadership.

We also believe that the schools of Jewish communal service should give a much greater priority to leadership development and management training for the next generation of executives. These and additional training programs should provide more opportunities for lay leaders and professionals working together to learn to manage the relationship in as productive a way as possible. In addition, training must also be given in fiscal management and financial resource development. If these changes do not occur, our major Jewish communal organizations may be managed in the next decades by people who come from business-related disciplines without a Jewish community organization perspective.

CONCLUSION

The volunteer-professional relationship is in flux and in many ways is in need of urgent re-examination. To a great extent, the success of our Jewish communal enterprise depends on the ability of volunteers and professionals to work as a team and to provide sound, visionary leadership and financial management to our organizations.

The issues that have emerged from our discussions with leading federation volunteers and professionals require diligent and ongoing communal attention if we are to be a vibrant Jewish community as we enter the next century.