THE INSTITUTIONAL CHANGE PROCESS

Lessons Learned Along The Way

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A strategic plan is not worth the paper it is printed on unless its underlying vision is embedded in the organization's culture. The most essential element of organizational change is the alignment of all relevant stakeholders to the new direction. Four steps taken by the San Francisco federation—updating the executive's leadership style, increasing staff involvement in achieving organizational plans, helping the board understand the scope of the change, and strengthening the agency-federation relationship—are critical to achieving momentum, the successful implementation of a vision for change. Commitment, persistence, and enthusiasm for change by the leadership are key.

Much has been written about the process of changing organizations. The for-profit sector outpaces the nonprofit sector in implementing change efforts by a significant period of time, perhaps a decade or more. Thus, just when some more adventuresome nonprofit practitioners begin to experiment with the latest version of reengineering, the for-profit executives who pioneered that method's use in their corporations have often long since discarded the approach for something far more practical and effective. But, nonprofit executives, trained in social work or public administration, for the most part lack the for-profit world's experience and, in a rapidly changing environment, grab the latest tome on management innovation at the bookstore, consult with the friend who teaches at the business school, and dive into a sincere, but often ill-advised effort to adapt methods pioneered in assembly-line manufacturing to the world of human service delivery.

Still, there is much management technology pioneered and tested in the for-profit world that can be successfully imported to nonprofit administration. The critical factor is the executive's application of a thoroughly honest appraisal of the state of the organization and its environment. Applied haphazardly or in too small doses, we are apt to make mistakes like those a non-speaker of Hebrew might make when asking for coffee and cake on Dizengoff Street while using a phrase book. Too little learning can be dangerous. Yet, lay leaders often tout the latest method or management book they have read, and we know that the systems we lead need something new, and so, we park our *sechel* at the door and plunge into Version 7.3 of strategic issues management, or re-visioning, or some other late-breaking method.

This article offers solace and the benefit of learning from a colleague's earnest mistakes to those who know that something needs fixing in their organizations. It describes the moment when one recognizes the need to do things differently, presents early preparations for organizational change, reviews some of the useful literature of the last decade, and then describes an organizational change process that is in process, the application of theories, and what has been learned to date.

RECOGNIZING THE NEED TO CHANGE

Federations have developed in the pre- and post-World War II American environment with variations, adjusted to local history, customs, and traditions, but all based around these common principles:

- One annual fund-raising campaign for local and overseas Jewish needs would be efficient and economical.
- A community planning, budgeting, and allocating process, involving respected

members of the community, had legitimacy and credibility that ensured that the dollars raised annually would be wisely and appropriately spent on Jewish needs.

- Federations could and would add value to the agency beneficiaries, the donors, and to the Jewish community at large by periodically assessing and responding to needs, conducting program evaluations, and by intervening when necessary to eliminate duplications of service and ensure efficiency, effectiveness, and economy of service delivery.
- Federations could conduct the business affairs of the Jewish community more effectively than individual agencies, pooling agencies together to buy more economical insurance, employee benefits, and other goods and services that all would need to conduct their business.
- Federations would develop communal endowment and capital planning programs and to ensure that donor needs would be served, that communal assets would be well managed and properly used, and that the income would be distributed fairly and appropriately.
- Federations would enable the Jews in their area to respond effectively to the needs and challenges of the Jewish of Israel, the Soviet Union, and wherever Jews were in need of protection and assistance.

These principles were sacrosanct.

Just as certain fundamentals held true, so community workers who entered Jewish communal service before 1985 remember a normative, rational, and bureaucratic reliability to the annual cycle: first launching the program year, launching the fund-raising campaign, responding to external challenges (e.g., battles in Israel that required American Jewish mobilization), and then budgeting and allocating for the next year.

However, by the late 1980s that certainty of annual cycles and of basic principles had begun to erode, and increasingly, Jewish communal organizations, and especially federations, began searching for means of clarifying purpose, direction, and programs. Although the environment of the Operation Exodus and related global efforts to move Jews away from the CIS republics created an island of need, externally focused, this had the effect of delaying the quest for renewed purpose. As a result, many Jewish communal organizations, and especially federations and their national and international instruments, became deeply engaged in value- and goal-clarifying efforts, re-visioning exercises, and strategic planning processes.

In San Francisco, a strategic planning effort followed the latest Jewish population survey, which was conducted in the late 1980s. Yet, as a new executive, I found that the process, producing four volumes of findings and recommendations, had not struck roots with the various constituencies involved in the process. Despite the fact that more than 300 individuals had been involved in the process, the investment proved to be a mile wide and a millimeter deep, leaving leadership with interesting reports, desirable new directions, and no mandate to implement the changes.

By the mid-1990s in San Francisco, the principles upon which the federation was based were in need of review and update, and the external challenges to which it had responded magnificently over the decades seemed to many donors to be largely completed missions. The central challenge to the future of American Jewry seemed to be Jewish identity and affiliation—whether there would still be millions of affirming and practicing Jews in one or two generations. To leadership of the federation at the time, there was need to think deeply about change. Yet, the strategic planning process of the late 1980s was only a few years behind us.

In the winter of 1995, the Jewish Community Federation (Federation) undertook a market research project to understand better how to encourage the next generation of donors to become involved with it. The researchers found much that was promising in the surveys and focus group findings, but felt that Federation was too staid and seen by many under 35 years of age as "their parents' philanthropy." What the respondents told

the researchers they would respond to were messages, backed by reality, that Federation serves as their "extended Jewish family," particularly since so many were not native to northern California.

As the report was concluded, a member of the research team was retained to assist Federation to implement its recommendations. In the next six months, specific operating programs were recommended that required that Federation change from being operationally driven to being more market driven and more responsive to donors, agencies, and service providers, volunteers, and to the community at large. These recommendations required retraining of staff toward a customer service orientation, warming up contact with donors, developing a better system of donor and volunteer appreciation, and more effectively using our campaign database to retain information about donors that could help achieve warmer communications, e.g. retaining date of birth, life-cycle news, donor preferences as to issues or billing preferences, and the like. Doing so, said the consultant, would require significant retraining of personnel and support of the board, and she recommended using an organizational development consultant, whom we then retained to work with the management team.

In a series of long engagements with the organizational consultant, it became clear that external and internal changes in the philanthropic arena, in American society, in Israel-Diaspora relations, in local Federation-agency relations, and with the national service system for the local federations (United Jewish Appeal, Council of Jewish Federations, etc.) entailed a fundamental rethinking of how federation should serve the Jewish community in the coming years. We thought a proper strategic planning process involved building consensus around the issues and the possible answers among the constituents. Yet, we were faced with widespread skepticism from leaders and volunteers given the expense and failure of the last strategic planning process. How could we best mobilize the community to undertake this review and to commit to the changes needed to be effective in the future?

A BRIEF REVIEW OF THE LITERATURE

Since the late 1980s, many nonprofit organizations and many Jewish federations have used forms of strategic planning to try to bring about change that their leadership felt was necessary to their organizations' future. The most ambitious change process was that of the New York UJA-Federation, described in useful detail in a series of monographs compiled and edited by Michael Austin (1996). In the fall of 1996, interest had grown so great among Jewish Communal Service Association (JCSA) members that a national educational teleconference was held to describe one approach to this effort. This in turn stimulated a symposium on reengineering in the *Journal* (Cohen, 1996), and periodic articles on the method and experience of other practitioners in attempting to manage strategic change efforts in their organization. All the mid-1990s efforts made use of the path-breaking work of Michael Hammer and James Champy described in *Reengineering the Corporation* (Hammer, 1993), and Hammer was a featured speaker at the CJF General Assembly in November, 1997.

In all the strategic planning literature, emphasis is given to involving all relevant stakeholders, because all those who are expected to get behind the change foreseen by leadership need to become invested in the identification of the problem and the discussion and determination of possible solutions. Bryson reminds us of what for social service executives should be a given:

> A nonprofit organization is effective to the extent that it meets the needs and demands of individuals, groups, or organizations (stakeholders) concerned with its activities. The stakeholders are both those groups without whose support the organization would cease to exist and those who would be most seriously affected if the organization were to cease providing a service (Bryson, 1988, p. 21).

In getting started, the executive must clearly identify all who would be affected by the change proposed and whose support is essential if the organization is to be successful.

Much has been written about re-visioning organizations. Visualizing the future when the community is served by a re-energized and effective organization is a powerful tool to change and focus minds of stakeholders and later, as the hard work of implementation begins, to remind all involved of the goals. Belasco (1990) offers one of the clearest statements of the importance, to the leader, of communicating and reinforcing the vision:

> First, *tell that your vision represents what you think and feel.* Your managers want to know that your vision comes from your own heart, not the pen of some clever public relations person....Second, *get understanding of your vision.* Managers need to say to themselves, "I understand the vision." People learn best from examples they understand. Or ask the managers to restate the meaning of the vision in their own words. This clarifies meanings and gets everyone on a similar wavelength....Third, *keep building the need to change.* That's one of the underlying purposes of these management meetings....Fourth, *generate specific, concrete actions that support the vision.*...Have your people set specific goals and action steps that use the vision. Then report progress on their specific goals and actions. Fifth, *emphasize short-term actions.* Management action takes place within a short time frame perspective....Forty-eight hours is the magic time frame. If action isn't taken within forty-eight hours of attendance at a meeting, it will likely never take place....Sixth, *be prepared to handle objections and obstacles.*...Answer them with actions. Your managers are key players in the use of your vision. Your people look not only to you for example setting but also to their immediate boss as well. Get your management staff using your vision (italics in the original text).

Belasco summarizes the critical steps that must be taken to ensure that the leader's vision becomes embedded in the organization's underlying culture. This process, which in nonprofit settings takes much longer than in the for-profit sector, will determine the pace of necessary change and whether the new plan can really take hold. By contrast, in the for-profit sector, the vision is often clearer, prior experience of leadership more relevant, and the urgency for change more apparent. Therefore, change called for by the leader can be effectuated quickly, and managers who do not support the new direction will likely leave the organization soon after the change begins.

Because large federations are multi-divisional and not often well focused on a few goals, services, or programs, the importance of this process of constituency or stakeholder involvement cannot be overemphasized. Kotter's work points up the critical flaw leaders evince when they assume that stating a goal makes it live in the organization. He notes, "Whether delivered with many words or a few carefully chosen symbols, messages are not necessarily accepted just because they are understood" (Kotter, 1990, p. 57). Kotter goes on to describe what proves to be the most essential and time-consuming element of organizational change: the effort to align all relevant stakeholders in the organization to its new direction, "Alignment [is defined as] a condition in which a relevant group of people share a common understanding of a vision and set of strategies, accept the validity of the direction, and are willing to work toward making it a reality" (Kotter, 1990, p. 60).

All organizations have cultures. There is an ice-breaking game we have used on occasion at staff retreats called "cultural anthropologist," in which staff members break up into teams and, through a series of questions, attempt to "discover" what a colleague from another department does. The game is great fun and achieves its purpose of acquainting staff from different areas with one another. But, on reflection, and throughout the year, too little is known by colleagues of how another's department contributes to the overall goals of the organization. And, perhaps

more importantly, how often have we noted how resistant colleagues are to new means of doing the tasks at hand. Resistance to change is certainly a natural human behavior. But, when the lack of knowledge about the organization is combined with resistance in an organization undergoing a change process, the net impact is wholesale resistance to change. If the staff do not understand, and/or cannot be helped to learn new behaviors and adapt to new approaches, soon volunteers will follow the staff's resistant behavior, and the change process will bog down. I have come to call this effect "cultural obduracy," the natural resistance of human beings to change in organizations.

De Pree offers an important observation about the importance of organizational culture from his lifelong involvement with the Herman Miller company. It is very applicable to our challenge:

> As a culture or a corporation grows older and more complex, the communications naturally and inevitably become more sophisticated and crucial. An increasingly large part that communication plays in expanding cultures is to pass along values to new members and reaffirm those values to old hands. A corporation's values are its life's blood. Without effective communication, actively practiced, without the art of scrutiny, those values will disappear in a sea of trivial memos and impertinent reports (De Pree, 1989, p. 108).

Thus, if leaders are to ensure that strategic change processes take hold in the organizations they lead, they must be certain not only that the vision is heard and understood but also that it is accepted and put into practice, and in turn, that it becomes embedded in the organization's culture.

Carver offers a graphic way to remind all within the organization of the new approach: "Unless a mission is pervasive, it will lose its compelling power in organizational affairs....The mission should appear on all documents, on the phones, and in the conference rooms. Live with the mission" (Carver, 1990, p. 66). However, graphic reminders,

although useful, will not ensure that behaviors change to support the new direction. Imparato and Harari, suggest a more emphatic approach, one that nonprofit organizations will engage in only after a great deal of deliberation:

> Ensure that those who live the values and ideas of the organization are the most rewarded and the most satisfied. This is how leaders can enhance coherence and unity while enhancing corporate performance, integrity and espirit d'corp....Leaders can increase the probability by making certain that different experiences accrue to individuals based on the degree to which their performance and behavior give expression to the "high purpose" [vision or mission] (Imparato & Harari, 1994, p. 194).

Even if this method seems unusual for the nonprofit arena, the support of management team members is essential if the rest of the organization is, in time, to become aligned with the new direction required.

Finally, the results of the organizational change process have been documented in the for-profit sector. The Herman Miller company led by Max De Pree has won numerous awards over a long period of time, even as it has been one of the most profitable furniture manufacturers in the world. De Pree has coined a term for the successful implementation of vision and new direction, *momentum.* He writes, "*Momentum* comes from a clear vision of what the corporation ought to be, from a well-thought-out strategy to achieve that vision, and from carefully conceived and communicated directions and plans that enable everyone to participate and be publicly accountable in achieving those plans (De Pree, 1989, p. 18).

The end goal of organizational change processes must be momentum. The questions now are, How and where has momentum been achieved successfully in the nonprofit sector?, and For our purposes more specifically, Where has momentum been the result of strategic change processes in the Jewish communal service community? We do not yet

have a literature of success, because, at best, we are still trying to make these efforts work. And, to borrow from the writers quoted, we may not have been sufficiently attentive to the process of embedding new ideas, new vision, new goals, and new objectives into our organizational cultures.

THE PROCESS OF CHANGE IN
ONE JEWISH FEDERATION

Future Search Conference

The question before the leadership of the San Francisco Jewish Community Federation in the winter of 1996 was how to secure broad investment—from the board, staff, agencies, and donors—to the need to change direction. We searched for a "key for the engine." The first thought was to try a more effective strategic planning process than the one undertaken eight years earlier.

One day I was meeting with the CEO of a major bank, who was an important lay leader, to solicit his thoughts about the need for a strategic planning process. The CEO vigorously shook his head no and explained that traditional planning processes are far too slow in a rapidly changing world. He argued from his experience leading an internationally successful bank that, from the time the issues are identified, stakeholders persuaded to become involved, the matters studied, and the recommendations reached, two years have passed. By this time, the original presenting issues are irrelevant, and so are the study results. There is no excitement to this process, and as a result, momentum is not created.

Mulling this experience over, I turned back to the organizational consultant, who agreed with the CEO and said, in fact, that most of his for-profit and government clients were using a telescoped approach to strategic planning—a well-designed, 48-hour retreat labeled a "future search conference." In this conference, a conclave of all the relevant stakeholders in an organization would together re-vision the future of the organization and, in the process, identify real, post-confer-

ence work to build toward that vision and to build momentum. This approach had some additional benefits:

- It helps stakeholder groups identify a common vision of a desirable future they want to achieve together.
- Activities focus on common ground, not past problems.
- Participants reflect the whole system, taking advantage of the insights and perspectives of many stakeholders.
- Outcomes are agreement/consensus-based, resulting in greater buy-in and stronger commitment to the implementation of action plans.
- Higher-quality plans are developed because the whole system is in one room versus a few people planning and then trying to convince other to buy-in and implement change. Everyone hears the same thing at the same time.
- Development time is radically shortened, producing a product that is dynamic, current, and useful immediately.
- Costs are significantly lower than a linear review process that hinges on iterative, repetitive "checking out" of key stakeholders.

A planning committee was organized drawing from the relevant categories of stakeholders: board members, donors, staff, and agencies. Once the planning group was recruited, the chief professional and volunteer leaders did *not* participate in the planning conference, by design, in order to empower imaginative thinking. This group had two tasks, which were accomplished over six weeks: articulate the central question for the retreat and identify representatives of the four stakeholder groups who would be invited to participate in the actual conference.

More than fifty people participated in the future search conference. They, in fact, were broadly representative of the four groups, with the Federation board being disproportionately represented for two reasons: the board itself is broadly representative of the

Jewish community, by design, and without ample buy-in from the board, recommendations for change might be resisted. Half the participants were board members; the other half were divided equally among donors, agencies (including agency executives), and staff. Five of the participants were respected leaders of non-affiliated Jewish organizations and were non-donors to the federation. All had a common interest in the future well-being of the Jewish community. Together they asked and answered the question developed by the planning committee: "In what ways can federation change to be most valuable and useful to the Jewish community over the next 20 years?"

In the first day of the conference, a deep consensus emerged that (1) a roof organization was very much needed to serve all the diverse interests of organized Jewry in the federation area and that (2) federation must dedicate itself to a vision of a more vibrant Jewish community, one that would see a significant increase in participation in Jewish life. Over the balance of the conference, the facilitators led the participants to identify strategies that would enable this vision to be realized. To live up to this vision, federation would have to reshape itself along these lines, which were developed during the conference as "themes":

- become more inclusive/welcoming
- place a high premium on Jewish content
- move annual fund-raising/allocating toward solicitation of multi-year gifts/multi-year grants
- increase and strengthen regional operations to better serve dispersed populations
- improve operations to support voluntarism and to improve leadership development
- increase coordination of annual and endowment fund raising and disbursement
- envision and work toward a "seamless, lifelong continuum of services"
- create value-driven alliances between agencies and organizations serving the Jewish community
- have an open governance
- reward/encourage community development; increase opportunities for involvement in Jewish life

After the conference, four task groups were appointed, made up of participants in the future search conference as well as other volunteers, to explore ways of responding to the major themes and issues explored over the weekend. They reported to the board, which accepted their recommendations without change, and in turn, the conference participants were informed of progress by letter.

Addressing Leadership Style: Use of a Personal Coach

By the summer of 1997, one year into the process, I realized that two additional elements should be added to the effort to change federation to live up to the vision. First, with the support of my officers, I began using a personal coach who helped me see how my leadership style affected the various stakeholders and how I might change my behaviors to model the new directions I was committed to taking. This journey is more difficult than it may appear, because after twenty-five years of career success, it is not easy to be self-critical and more difficult still to attempt to modify one's established patterns of behavior in organizations. Yet, to the extent some volunteers felt less supported by me (and worse, others, lay and professional, modeled their own behavior after mine), or staff felt I was unconcerned with their genuine sense of obstacles that blocked their efforts to support the vision, or agency leadership felt that their efforts were not fully valued by me, then these vitally important stakeholder groups were less than optimally engaged in the change process.

Once the coach was retained, she suggested eliciting baseline data through a series of candid and confidential interviews with representatives of three key stakeholder groups: the board, the Federation staff, and agencies. The coach and I developed an interview schedule and identified potential

interviewees, with a purposeful focus on including individuals whom I knew were critical of federation or of me. The interview schedule was designed to elicit candid and insightful comments, the questions were open-ended, and interviewees were asked to allow one hour for their session with the coach. At the heart of the questions were leading questions, such as the following

- If federation were to work to improve, what do you think needs improving?
- How are the executive's listening skills?
- Can you describe the executive's work style?
- Do you perceive any barriers to working effectively with the executive?
- The executive wants to improve his effectiveness; do you have any suggestions?

These five questions were the heart of a 12-point interview schedule. Although there was much to be proud about in the responses, the reason for undertaking this exercise was to learn about less-than-optimal behaviors with a commitment to finding ways and means of improving them.

The coach distilled the critical input into three behaviors that needed attention:

1. *Personal style:* occasional displays of impatience or anger; presenters not always certain that what they needed to say was heard
2. *Accessibility/visibility:* a need within the organization for the executive to be felt as more present and caring and, by agencies, a need to see the executive at more of their events as a demonstration of support
3. *Management team:* a need, expressed by both staff and board members, to strengthen management and to ensure alignment of departmental work with overarching goals and objectives

In each cluster of behaviors, the coach helped me focus on simple changes in behavior that she could help reinforce. "Permission" was given to key staff and officers to call

me on these work areas if old habits crept back. A diagnostic update is included in my annual performance review with the officers, and although, after more than a year of effort, much has improved, changing ingrained and comfortable habits takes very hard work and that work continues.

Addressing Organizational Culture: Alignment Process

The second element was the reshaping of the federation's management team and with it, a concerted long-term effort to change the organization's culture. A former business executive who had been consulting with me on organizing federation to support the change agreed to join the federation's management team for a limited time; his tenure lasted only one valuable year, before he returned to the for-profit sector. During that time, while serving as chief operating officer for the federation, he placed great emphasis on engaging the staff at all levels in helping generate personnel policies—subject, of course, to lay approval processes—with regard to workplace values, teamwork, and identification of the obstacles to more effective work and then working together to change the way federation functions.

Through a series of all staff and interdepartment work groups, this statement of "Workplace Values and Beliefs" was crafted:

The quality of the Jewish Community Federation as a workplace and of the Federation's relationship with its staff is central to achieving the Mission and Goals of the Federation.

The values of the Federation are grounded in Jewish values, animated by *Torah* and acts of *Tzedekah*. These values and learning about them are a core component of the Federation workplace.

Service is a keystone to building a quality Federation and quality workplace. Our first rule of service is to treat our community, donors, beneficiaries, and each other as we would wish to be treated—with courtesy, promptness, understanding, and respect.

Employees play a central role in serving donors and beneficiaries. The Federation strives to be an exemplary employer, providing an environment defined by respect, fairness, teamwork, and opportunity.

Our communication with our donors, beneficiaries, the public, and each other is clear, honest, complete, and timely.

Our donors provide their gifts in good faith and assume Federation to be trustworthy. Staff responsibility and integrity must be of unquestionable character.

Federation will develop a planned approach to staff education and development, which is intended to support the achievement of Federation goals and needs, improve the quality of the workplace, and support individual career development.

This document grew out of regular and structured opportunities to engage the whole staff in learning about federation's values and vision, goals and objectives, and the rationale for the change process. This engagement provided an opportunity to unlock the potential of our entire workforce and to treat our employees as key constituents. The statement of values and vision drove a process to identify obstacles to greater achievement, which resulted in a work plan for continuous workplace improvement. When the chief operating officer moved on, I began a search for an executive with specific training and experience in organizational and human resource development, as well as operations management experience, to continue the alignment effort.

Taken together, these steps, still in process, are seen as fundamental to supporting the overarching operation plans designed to realize the new vision.

At the same time as the staff was engaging in this effort, a formal internal organizational planning and budget process was introduced to the board and committee structure. Beginning with the vision, purpose, and overarching goals generated by or clarified through the future search conference, all of federation's current activities were analyzed and func-

tionally accounted for and then displayed on one spreadsheet to assist the board and committees to begin to understand both the wide variety of functions now operated by federation, as well as to see clearly where existing functions did or did not support the new vision and goals and where new programs or strategy implementation could support more successfully the new goals. This spreadsheet enabled the board to realize that if resources were not sufficient to support all that was planned, then functions that support the new vision would be given highest priority and funded first, and functions that had little or nothing to do with the new direction would be lowest priority and let go. Additionally, the board participated for four months in pre-board meetings called study sessions, where they had the time, without regular business pressing, to ask all manner of questions and engage in discussion, thus ensuring that board members understood fully what they would eventually be asked to support for the coming year.

These three elements—updating the executive's leadership style, improving workplace and staff involvement in achieving organizational plans, and helping the board understand the scope of the change process and to see how their support contributed to realizing the visions—are three fundamental steps toward achieving organizational alignment with the new vision. These are also very labor intensive and ongoing activities that must be supported actively for several years. Without this continuous focus and support from leadership, the culture change needed to make the new vision live on will not take hold. Thus, at the three-year mark, I now recognize that at least three more years of intensive focus on change will be needed to complete the transition.

Addressing Federation-Agency Relations

By the winter of 1998, it was clear that a fourth and final initiative in federation-agency relations was needed. The policies, practices, and procedures that guided federation's relations with its agencies were developed de-

cades earlier. Although on the whole these were quite adequate, they did not acknowledge the dynamic growth and development of a few of the largest agencies nor of the enormous increase in communal resources developed and managed by federation. Furthermore, when the focus of the new vision was to significantly increase participation in Jewish life, the federation, in behalf of the Jewish community, had a stake in increasing the sense of partnership among all the agencies, congregations, and organizations serving the community. As this direction was called for in the outcomes of the future search conference the federation began organizing itself to commence a structured dialogue with its agencies beginning in the early winter of 1998–99 to identify the ways and means in which, as partners, we can better support each other and thereby add value to the Jewish community.

As this article is being written, an interview schedule for individual dialogue sessions with each domestic federation agency, donors, and community leaders is being developed. The key areas of assessment include defining the partnership, updating the federation's role and function to better support service delivery, improving federation's resource distribution system, and more effectively engaging donors and volunteers in supporting service delivery. The sessions will be conducted by a consultant retained by federation and in a confidential fashion; i.e., no staff or lay leaders from Federation will participate in these discussions, thereby eliciting the most candid input from the agencies, donors, and leaders.

By the summer of 1999, the information thus gathered will be distilled into areas for response and change in the areas of policy, practice, and procedure. Before recommendations for change are brought to the federation board, administrative practices that the federation needs to update to do its work effectively will also be discussed with the agencies, such as making our accountability forms easier to use, co-branding of the federation with agencies, and more effectively coordinated fund raising. Although the final

outcome cannot be foretold at this writing, it is anticipated that updated policies, practices, and procedures will be adopted in concert with the agencies and reflected in memoranda of understanding between federation and agencies as defining documents for of these relationships.

Visualize a chair. If the first three legs are leadership style, staff empowerment, and board investment, then the fourth leg is partnership with the service providers. This chair will not work unless all four legs are strong.

The Leader's Responsibility to Continually Energize the Process

Two years since the future search conference, although much has been accomplished to reshape federation to live up to this vision, there is now a significant dissipation of energy. While these change processes were underway in discrete committees, the ongoing work of the federation had to continue. To what the literature of change identified as sources of resistance and impediments to change must be added these elements: fear of change (felt by insiders, both volunteers and staff, and to some extent by agencies), the power of inertia, the lack of a clear picture of what increasing participation in Jewish life would look like, and the persistent intrusion of daily life. The commitment and persistence of the leader are therefore all the more important because, periodically, the will to continue must be mustered and the whole system must be re-energized or else the natural tendency to entropy will overwhelm and stop the change process.

FROM THE TRENCHES: LESSONS LEARNED IN THE FIELD

There is a certain amount of *chutzpah* involved in reviewing a work in progress. It is possible that three years from now the dissipation of energy for change just noted will have continued and that the change process will have failed. One reason for writing this now, at what is arguably an early stage in a multi-year effort, is that my review

of other strategic change processes in the nonprofit field has yielded a field of dreams never realized. Many colleagues report that, once approved by boards, too many strategic planning reports are shelved and gather dust. The heart of the challenge has been the implementation process, and too many practitioners underestimate the concerted time, energy, and unflagging commitment leadership must make to see the process through.

Seeing the process through requires formal implementation strategies, formal plans, and programs whose implementation must be measured and accountable, both inside and outside the organization. The paragraphs of verbiage articulating the vision and goals must be reduced to simple and ubiquitous word pictures that convey a clear and compelling idea of why working toward the better future is worth letting go of the staid and predictable present. Without this continuous reference to the new tomorrow, the inertial force of fear of change will frustrate and likely disable the effort to get to the new world imagined. This key to change is what animated the process of organizational alignment.

Every day, the leader must manifest passionate commitment to the new and emphasize the urgency of changing to get to the re-envisioned organization. The simple and clear vision statement thus becomes a map to a better future, and the sooner staff, board, and agencies are convinced that it is worth achieving, the sooner that commitment to this change, to this new way of being will become rooted in the culture. Given how resistant people naturally are to change, every little accomplishment along the way must be celebrated. Doing so regenerates the energy that is unlocked in conferences and retreats, but dissipates too quickly given the pressures of ongoing work.

Throughout Jewish history, ours has been a story of continuous evolution. Wherever and whenever Jews have lived, local communal organizations have developed to enable those communities to do collectively that which could best or only be accomplished as a community. Our constant compass have been the stories that describe a vision of a different people found in Torah. By contrast with the majestic history of the Jews, the effort to change contemporary Jewish communal organizations to make them more effective servants of Jewish communal need is but a brief episode. This is a task from which we are not free to desist.

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