

THE RELATIONSHIP BETWEEN Jewish professionals and volunteers is at the heart of all aspects of Jewish communal life, and it is often so complicated. What is it that makes this relationship so fraught? Might it be redesigned to build on the strengths of the leadership? How can the governance of Jewish communal institutions be reshaped to reflect a heightened appreciation for human decency, a greater respect for diversity of class and gender, and a broader sense of the wide range of talent and expertise in Jewish life?

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## Whither the Professional and Lay Leadership?

A recent *Sh'ma* Round Table discussion on the lay and professional relationship brought the following communal leaders to the table: Bob Aronson, President of the Jewish Federation of Metropolitan Detroit; Beryl Geber, Director of the University of Judaism's MBA Program; Rabbi Shoshana Boyd Gelfand, Vice President and Acting Director of the Wexner Heritage Program; Nate Levine, Executive Director of the JCC in San Francisco; Arnee Winshall, Founding Chair of JCDS, Boston's Jewish Community Day School; and Judy Yudof, President of the United Synagogue for Conservative Judaism; The moderator, Carl Sheingold, is Director of the Fisher Bernstein Institute for Philanthropy at Brandeis University. His introduction follows.

### Seeking Sources of Strength

The following round table discussion between professional and lay leaders suggests that mutual respect and clarity of role in the volunteer-professional relationship is essential. It is often present with rewarding results for the organizations and individuals involved. But why is the presence of these qualities absent in too many cases, beyond the obvious fact of human limitations?

The lay-professional relationship takes place in a changing environment. For example, Bob Aronson notes a trend toward increased professional leadership of our institutions. Several other comments suggest that this trend is not universal and is the subject of mixed feelings. Surrounding this is the fact that lay leaders, donors, and professionals have changing and diverse understandings of the nature of communal institutions and the leadership they require. Many of these understandings come from outside the communal context — for example, the experience of board members with effective corporate leadership. The following discussion also addresses the increasing independence of donors, particularly major donors, leading to opportunities for creativity but also to new tensions in what is already a very complex governance process.

At the Fisher Bernstein Institute, we have organized successful training for volunteer-professional teams. We have found that in regard to these and other trends it is both necessary and possible to facilitate serious and frank discussion. And it is both necessary and possible to offer training in the real and very personal challenge of making this relationship work. Respect requires understanding and acknowledgment of the complex, macro realities confronting this partnership. And the only clarity that is useful is one that recognizes the adaptive nature of this challenge, both communally and for individuals. The goal is to make the differences in role and personality between volunteer and professional leaders a source of strength, a basis for depending on each other and experiencing one of the most important meanings of community — to be a part of something larger than oneself and to be effective in ways one could not be alone. That strikes me not only as an organizational ideal but also, as a Jewish one.

— CS

**CARL SHEINGOLD:** I know there are times and circumstances where the lay-professional relationship works very well, is gratifying for the people involved, and validates the partnership. And I know there are lots of circumstances where it's dysfunctional, painful, destructive — both personally and organizationally. Through your own experiences and observations, what's the key to making your professional relationships work well?

**BERYL GEBER:** Mutual respect. Although this sounds easy, developing mutual respect is, in part, a matter of expectations, of how people fulfill their roles. Not all volunteers — even if they are committed to an organization and even if they are full of virtue — have the same ease in interpersonal relationships. It comes down to a willingness to listen and give credit, to understand that this is a partnership, which means that flexibility and respect are essential.

**BOB ARONSON:** The basic fundamentals of the lay-professional relationship are shifting. And while balance is still important in terms of partnership, the professional role is becoming more of a leadership role and a directive role, and less of a facilitative role, which is how many of us were trained. I also see a change in the nature of lay leadership. Although volunteer leaders are just as committed as before, they do not necessarily have the time that a past generation of lay leaders had, and therefore rely more heavily on the professional. The lay-professional relationship needs some attention because it's gotten out of whack — professionals are expected to do far more than any of us were trained to do, and many volunteers are pulling away because they don't feel as invested, or empowered, as they felt previously.

**JUDY YUDOF:** I thought I was going to agree with Bob, but I don't because I'm a hands-on volunteer with probably too much time on my hands. Of organizations that I've led, we have felt that the policy-making power was with the lay board, and that the administrative authority to carry out that power, and its daily responsibilities of the organization, belong to the Chief Executive Officer. The CEO must be accountable to the lay leadership. I think the strain comes when the lay leadership isn't strong enough to fulfill its responsibilities

of setting policy and being clear about what policy is in their domain and what is operating procedure. Without clarity, a talented professional leader is going to fill that vacuum.

**SHOSHANA BOYD GELFAND:** One of the keys to volunteer-professional relationships functioning well is clarity of roles and expectations. We use the word "lay leader" to mean everything from a volunteer to a donor. And our definitions of professional leaders are often too broad as well. Sometimes the expectation of the professional is to be the visionary of the organization; other times it's to administrate or implement that vision. The key is knowing where authority lies and how decisions get made.

**ARNEE WINSHALL:** As Shoshana said, a key thing is managing expectations and maintaining clarity. In a school, we look very carefully at trying to balance our board oversight with micromanagement, and to allow the head of school to be delegated the general management responsibilities. Because the lay leader is responsible for evaluating the performance of the professional and ultimately the success of the institution, it is critical to create complementary support systems — a shared understanding of everybody's capacity and how to address areas where more expertise is needed.

**NATE LEVINE:** I want to point out two additional factors. One is that the relationship builds from strength to strength. The professional has to be strong in his or her core competencies, leadership, and vision, and the lay people or the board have to be knowledgeable and strong leaders. Second, as Shoshana said, is clarity of job roles. And I would add that clarity on the objectives of the organization itself is essential. The board plays an essential role in clarifying these objectives.

**CARL SHEINGOLD:** And what impedes the partnership?

**BERYL GEBER:** A number of factors impact the relationship negatively. First are the extremely high expectations of our professionals and volunteers. Volunteers, who are putting in a lot of time, often don't understand that the professional is balancing several commitments on the job — not just the particular needs or

focus of the volunteer. While the volunteer might be available at all hours of the night, it does not mean that the professional should be expected to do the same.

**BOB ARONSON:** The relationship breaks down or has problems when the level of candid communication and honesty leaves the room. These relationships have shifted dramatically over the years. I think that there is less room for the professional, certainly the chief professional, to learn or to make mistakes the way that it may have been possible in the past. I also think that our professionals are not necessarily as well trained as they should be, in terms of the volunteer-professional relationship. But basically at the end of the day it comes down to respect and trust and being able to talk to each other.

**JUDY YUDOF:** Shared values and visions is another key to a successful working relationship.

**SHOSHANA BOYD GELFAND:** When the relationship becomes dysfunctional, a blurring or a merging of identities occurs. Why do people take on lay leadership positions? Why do people take on professional leadership positions? The answers are complex and include personal identity issues, spiritual identity issues, and professional identity issues. It would be helpful to understand why we are sitting around the table and passionate about what we do, and where our potential partners are coming from. When those identities are compromised the cost is incredibly high, not just to the organization, but to the community as a whole.

**ARNEE WINSHALL:** An inherent dilemma exists when a lay leader brings his or her own expertise from the field to the running of the institution. While lay leaders want to share their expertise, they do not want to micro-manage the professional.

**NATE LEVINE:** Professional leaders are lacking adequate preparation for the depth and breadth of what their job responsibilities require, particularly in business acumen. While we have a lot to learn from the corporate world about board-professional relationships, what is unique to the nonprofit is that at any one time a volunteer is simultaneously a cus-

tommer, a co-worker and part of the workforce, and a strategic policy-maker for the organization. A lot of professionals have difficulty navigating that subtle relationship. Among volunteers, there is often confusion between someone's donor capacity, his or her family pedigree, and his or her leadership skills. We put people in leadership positions for various reasons, without the necessary qualifications. One last point about volunteers: some quite intelligent and sophisticated people seem to park at the door of a nonprofit board room the critical thinking they bring to their own business affairs.

**BOB ARONSON:** And how many of our volunteer leaders see Jewish communal service as a professional discipline? There is still such lack of respect for the profession.

**SHOSHANA BOYD GELFAND:** It's also important to distinguish between rabbis and other professionals. There's a very complex relationship between a rabbi and his or her synagogue board members. One day the rabbi is relating to a board member and the next day he or she is burying the person's mother.

**CARL SHEINGOLD:** And the day after that, Shoshana, they're evaluating your performance in delivering services.

**SHOSHANA BOYD GELFAND:** That's exactly right. Trying to shift between those various roles and the associated psychological transference is quite complicated.

**BOB ARONSON:** The role of rabbi may not be that different from the role of a federation executive today. As a matter of fact, in the rabbinic searches that I've seen here in Detroit in the last year it's interesting that the question of how well the rabbinic candidate fundraises is one of the first questions asked. And while federation directors don't perform life cycle events, in other ways we're very much in the same boat. Trying to separate our professional self from our personal self is perhaps even harder for people who work in agencies or federations these days. I haven't yet figured out how to tell a major donor who calls me at 11:00 p.m. that I'd rather speak to him the next day. Establishing limits is still a big issue.

**ARNEE WINSHALL:** The composition of a

board is very important. For instance, I can't imagine that a synagogue board would include anything but synagogue members. But in our school, for example, less than 50 percent of the board members are parents, providing a perspective from outside the immediate constituency served by the head of school. How many of our Jewish nonprofit agencies ensure that the board includes lay leaders that are immediate recipient constituencies?

**CARL SHEINGOLD:** Along with the increase of business practices in the nonprofit, we are also seeing an increasingly independent role of donors, particularly major donors, who seek to have an impact on the organization, and on Jewish life outside of serving and formal governance positions. Does this change things?

**BOB ARONSON:** The ever-changing face of Jewish philanthropy and giving these days has caused tremendous challenges for the lay-professional relationship. What happens when major donors shift their giving? If a \$500,000 commitment is canceled, it adds tremendous tension and difficulty to the relationship. At the end of the day, the volunteer turns to the professional for direction on how to go out and replace these dollars, and who's going to do it, and what happens if it can't be done, and who's accountable for this.


**BERYL GEBER:** I think the major donors are a problem not only for boards but also in terms of where the professional is first obligated. When a major donor tries to alter the direction or focus of an organization, it puts the professional in an extraordinarily

difficult position. How the professional balances the competing demands of volunteer leaders is something we haven't addressed. Professionals are confronted with conflicting demands and expectations from different lay leaders.

**ARNEE WINSHALL:** Too often, the relationship between the board and the professional isn't viewed as a win-win where the institution and professional are poised to grow; it's viewed as something that everybody's afraid to touch.

**SHOSHANA BOYD GELFAND:** I've heard the profoundly disturbing comment, "I wouldn't encourage my child to become a Jewish professional." And the same comment — not encouraging a child to become a lay leader — is equally troubling. When will this relationship be valued for bringing different strengths and skills to the organization?

**JUDY YUDOF:** This is particularly applicable to congregational rabbis. In addition to a situation where there are too many masters and too little remuneration, there is a lack of fundamental respect for the position.

**BERYL GEBER:** We have to find another way of motivating, training, and encouraging people to stay in the field as professionals. When the professional-lay relationship is good, it really represents a most meaningful collaboration. When mutual respect, appreciation of the enterprise, and partnership are successful, we are magnificently successful, and I just hope we can find more ways of being so. 

## Discussion Guide

*Bringing together myriad voices and experiences in a sacred conversation provides Sh'ma readers with an opportunity in a few very full pages to explore a topic of Jewish interest from a variety of perspectives. To facilitate a fuller discussion of the ideas, we offer the following questions:*

1. What are the fault lines in the relationship between Jewish professional and lay leaders? And how can they best be addressed?
2. What is the impact of feminism on volunteerism? Are Jewish organizations losing a needed pool of volunteers? How might they restructure to adapt to new social, technological, and communal realities?
3. Should business practices play a role in the governance of nonprofit organizations such as synagogues and schools?