

VOLUNTEER-PROFESSIONAL RELATIONS REVISITED

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In today's era of massive change, the lay-professional relationship is being tested in a very real sense, and the creative tension inherent in that relationship tends to become uncreative more frequently. Leadership development initiatives and management training are needed to help lay leaders and professionals manage their relationships in as productive a way as possible.

In a special *Journal* edition celebrating the one hundredth anniversary of the federation movement, we collaborated on an article about the lay-professional relationship. Our collaboration itself underscored one of our main points—the value of a dialogue between lay and professional leaders in making the tension inherent in such a relationship creative rather than destructive.

In light of Bernard Reisman's interest and seminal contributions to the area of lay-professional relationships, we were asked to revisit the 1995/96 article to see if its conclusions still held true. We are pleased to report that the article continues to be relevant and worthy of serious consideration.

In the rabbinic tradition, we comment here on our 1995/96 article, "Volunteer-Professional Relations: Intersecting Spheres of Influence," portions of which are reprinted below in italics.

THE CHANGING CONTEXT FOR THE LAY-PROFESSIONAL RELATIONSHIP

Every premise upon which we established the federated and national agency system and our relationship with Israel and other Jewish communities is changing in a fundamental way as we enter the final year of the twentieth century. The option to maintain the status quo is no longer acceptable, and leadership has the opportunity either to manage the

change or to be forced inadvertently into modifications on an ad hoc or haphazard basis.

As we continue through this period of massive change, the lay-professional relationship is being tested in a very real sense. It is not easy to maintain such relationships during a so-called normal period. It is particularly difficult when we are in such flux. Each of our interests and basic sources of legitimacy is being challenged, so inevitably much more insecurity characterizes the lay-professional relationship. Because there is less certainty about the next steps to take in managing the change, there is a growing lack of clarity as to each other's roles, less consensus among professionals and volunteers themselves, and certainly less agreement between them about how to proceed. More emotion exists within the relationship, and it is often harder to reason together. The creative tension tends to become uncreative more frequently.

There seems to be a more pronounced trend among lay leaders to consider hiring executives whose background is business or from another discipline outside the field of Jewish communal service. Lay leaders have the sense that today's Jewish world needs new approaches to leadership and to bring new energy, enthusiasm, and creativity to our enterprise. This trend is certainly understandable. However, we caution that what

could be lost in retaining such persons for executive positions is the very valuable Jewish community organization experience and Jewish educational background of many of our current executives. This trend will need to be monitored very carefully in the coming years.

PREMISES UNDERLYING AN EFFECTIVE LAY-PROFESSIONAL RELATIONSHIP

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.

New leadership approaches and skills are needed by executives, and their traditional preparation must be expanded to include finance, business administration, and other managerial skills.

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.

Some limits must be established on the power of each partner in the relationship, and 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 issues, 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.

In recent years, we have become increasingly aware of discussions between lay and professional leaders about the value of professional performance reviews. In some federations, the volunteer and professional are simultaneously evaluating their own performance, and then they meet to analyze each other's review. We urge that case examples of such reviews, both of professionals and lay leaders, be studied carefully. This is an area that needs further attention as the lay-professional partnership matures.

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 prevail 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.

During today's period of massive change, both the lay leader and the professional have to be guided consistently by their community's vision and mission statement. We must constantly remind ourselves that, although we want to be creative and entrepreneurial in helping our federations and communities reposition themselves for the twenty-first century, ultimately we must not follow our personal visions alone, but must be responsive to the communal direction established by our Boards of Directors.

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

In reviewing our earlier article, we were both heartened by the relevance of many of our recommendations and dismayed that many have not yet been implemented. The success of our entire Jewish communal enterprise rests in large part on the ability of volunteers and professionals to work together to provide sound and visionary leadership. Let us dedicate the energy we are using to honor Bernie Reisman to work toward the betterment of the lay-professional relationship.