

PROFESSIONAL PERSONNEL

A Local Response to a National Crisis

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Professional Excellence is a long-term local response to the national personnel crisis that was developed by the St. Louis Jewish Federation and is funded by a supporting foundation. The initiative uses a multiple-intervention approach focused on recruitment, retention, professional development, and organizational capacity building.

David Edell's call to action in this *Journal* (Edell, 2002) challenges the field of Jewish communal service to address what he termed a "crisis . . . about the quantity and quality of professionals available to serve the Jewish community." Edell acknowledges this is not a new issue and echoes an assessment issued by Larry Moses, President of The Wexner Foundation, that by and large the organized Jewish community, national and local, has failed to mount a serious effort to understand and respond to this escalating problem (Moses, 2001). Moses also emphasizes the adaptive nature of the challenge and the need for responses that are themselves multi-leveled, systemic, and sustained, rather than attempts to find quick fixes. Moses stated, "As with all human and organizational challenges, we need to develop a will to embark upon this journey, and we need tenacious leaders to lead us through it, and to assure its success." Taken together the Edell and Moses articles provide an excellent summary of the crisis and framework for analysis.

THE PROFESSIONAL EXCELLENCE INITIATIVE

In March, 2002, the Board of the Jewish Federation of St. Louis adopted the initiative, Professional Excellence, as a long-term, local response to the personnel crisis to be

undertaken in coordination with national institutions and efforts. Central to the launch decision was a commitment by the Lubin-Green Foundation, a supporting foundation of the Jewish Federation, to allocate \$1 million over a period of years as seed funds. The Foundation further indicated a willingness to view Professional Excellence as a central priority for the long term.

As stated in the initial proposal to the Foundation and Federation Board, the purpose of the initiative is to "build the capacity of the Jewish community at large as well as specific organizations to attract, retain, and manage high-quality professionals who will deliver services of excellence." The initiative uses a multiple-intervention approach focused on three aspects of the crisis: recruitment, retention, and professional development. Moreover, the initiative focuses on building the commitment and capacity of senior lay and professional leaders to create an organizational and communal culture that nurtures, supports, and rewards professional excellence.

The initiative is conceived to address the full range of professional disciplines—direct service, education, clergy, development, and management—and the needs of all local Jewish organizations, whether federation-funded or non-funded agencies, congregations, and other organizations. The initiative addresses both Jewish and non-Jewish profes-

sional employees. It promotes collaboration and leverages the knowledge, skills, and resources of local and national strategic partners. Experts in human resources and professional education contributed to its development.

The impetus for Professional Excellence grew out of a gradual recognition that the Jewish Federation (and the larger Jewish community) was not addressing, seriously and systematically, the local manifestations of the personnel crisis. Despite frequent references to the problem and its debilitating effects, rising turnover, and knowledge of contributing factors, personnel development and management generally was a low priority, ad hoc haphazard function. The Jewish Federation's initial response was to create a full-time, professional human resources function and employ an experienced full-time Director of Human Resources, recognizing that this was only the beginning of an effort to address the crisis.

Several additional factors influenced early thinking. With the exception of a modest program run by Washington University in St. Louis and Hebrew Union College—Jewish Institute of Religion, St. Louis lacks educational institutions that prepare workers specifically for employment in the Jewish community. It also became apparent that the substantial Jewish enrollment at Washington University in St. Louis was a resource to be developed.

An additional problem was the difficulty in attracting beginning workers, particularly young, single people from more attractive destinations, such as New York, Chicago, Boston, and Los Angeles. This is hardly a challenge unique to St. Louis or the Midwest. Finally, there was a recognition that, despite the crucial role required of national institutions, progress would depend on local effort. Communities like St. Louis needed to take responsibility for addressing their own needs.

INITIAL PLANNING AND IMPLEMENTATION

An initial process of exploration, emphasizing key informant interviews with experts

and colleagues locally and around the country, shaped a working model of the initiative and a funding proposal to the Lubin–Green Foundation. After acceptance by the Foundation, a first-year work plan was adopted by the Federation Board. That work plan outlined the organization of the initiative, directions for further research, development of a strategic framework, identification of initial priority projects, and exploration of possible strategic partners.

The Federation hired an individual with corporate human resource experience as the part-time Project Manager. It retained as a consultant Dr. Carl Sheingold, a management professor who had extensive experience in the Federation world. A local Advisory Committee, comprising lay and professional leaders, as well as human resource experts from the Jewish and general community, was convened to offer critical insight and reaction to emerging plans. Of note, Professional Excellence was structured as a professionally driven initiative, under the direction and management of senior Federation professionals.

Over an eight-month period, the consultant met with the initiative's management team, Advisory Committee, and local focus groups and consulted with national experts and potential strategic partners. Over 80 local lay and professional leaders were engaged at a kick-off seminar addressed by Larry Moses. A search of relevant literature was conducted, and a detailed census of the St. Louis professional cadre undertaken. At the same time, St. Louis was selected as one of the communities included in a national research project, funded by a group of major philanthropists, to be conducted by the Fisher Bernstein Institute and Cohen Center for Modern Jewish Studies at Brandeis. This will provide essential support to a project that is both long term and self-consciously experimental in nature. In January, 2003, The Lubin–Green Foundation and Federation Board of Directors adopted the report outlining Professional Excellence's goals, strategies, and plan of action.

Several specific projects have been initiated, including laying the groundwork for systemic local and perhaps regional promotion of Jewish communal service and St. Louis job opportunities. Supervisory training programs for beginning and mid-level managers as well as a special version of the Melton Adult Mini School are being offered. Initial steps have been taken to form a local professional organization. An on-going think tank process has been initiated to involve top lay and professional leaders in addressing issues of organizational and communal culture. Research, education and advocacy within community organizations is ongoing.

CENTRAL PRINCIPLES AND ASSUMPTIONS

Several years of work on Professional Excellence has provided both a broad and detailed frame of reference for a complex issue, which has been enriched and reinforced by numerous writings, research, and conversations. The central principles and assumptions underlying the initiative are neither startling nor original, but their synthesis seeks to provide a data-driven, comprehensive, and internally consistent paradigm within which to launch the initiative. However, as mentioned below, ongoing research and evaluation are required to validate, reject, or modify these assumptions, as well as the strategies that will shape the initiative. Indeed, the research will also help us gain greater perspective on the nature of the problem itself—the actual meaning of what, within the community, we have labeled a “crisis.”

Professional Excellence is a means to an end. Specific interventions and projects will focus correctly on the mechanics of improving recruitment, retention, and professional development. However, it is crucial to understand these efforts as instrumental to an end—the development of leadership and services of excellence that build a vibrant, caring community that nurtures its members, cares for those in need, and inspires Jewish identity. The welfare of our professional cadre is desirable and may even emerge as a

critical factor in recruitment and retention. Nonetheless, alone, it is insufficient justification for the initiative.

Professional Excellence is an important community-building activity. Again, although insufficient as a justification, it is important to recognize that building organizational capacity, developing cross-institutional solutions, and responding to the needs of community professionals strengthen the fabric and spirit of our community.

Professional Excellence requires a comprehensive approach encompassing recruitment, training, retention, and organizational capacity building. As Larry Moses (2001) stated, “To discuss recruitment and retention in isolation from the larger systems and professional cultures that encompass them would be incomplete and would not honor the seriousness the subject deserves.” Moreover, we are convinced that it will not work. Perhaps the keystone factor in addressing the crisis is understanding and influencing the communal/organizational environment and culture in which professionals work. This factor encompasses organizational readiness, attitudes, nature of the lay-professional relationship, willingness to commit resources, and willingness to make change. Changing the culture cannot be achieved without seriously engaging senior lay and professional leadership in understanding and becoming champions of professional excellence.

Solutions require a dynamic interaction between national and local efforts. Moses (2001) argues for a continental approach. However, the ultimate success of efforts by national organizations and philanthropists to recruit and prepare professionals is dependent on how those people are handled within local communities and organizations. Investments in the recruitment and professional education of talented individuals can enable them to enter the door of communal work. Will they stay? Will they flower? Will they inspire others to view this as an exciting and gratifying career choice? The answers to those questions will primar-

ily depend on their experience as professionals within local communal institutions. This is where local communities, supported by national resources, need to make strategic investments in building an environment that can sustain professional excellence.

Moreover, the leadership and involvement of local communities add value in two other important ways. There is a need to field-test ideas, models, and specific programs. Doing so requires multiple communal/organizational settings to establish the generality of models and successful replication of interventions. In addition, conducting training and other activities within local communities affords an added dimension of cross-disciplinary networking and learning that can enrich the training programs conducted by national organizations.

A communal approach crossing organizational and professional boundaries adds significant value. For one, it can realize important economies of scale through joint human resource functions (e.g., advertising, recruitment, and screening), as well as shared training programs and resources. A communal approach encourages professional networking and the development of a professional community, something we believe is increasingly absent from Jewish professional life. Such a community provides emotional support and helps workers understand their responsibilities in a wider context. It can enhance the quality of service by facilitating collaboration and breaking down barriers between institutions. Such networks can also be leveraged to contribute to professional development through the sponsorship of training programs, informal mentoring, and coaching. Recently, such communities as Atlanta and Baltimore have seen positive results in forming professional networks. A communal approach can help make St. Louis be seen as a preferred place to work, one where there is a strong sense of mission and community. This can be a particularly powerful attractor to new workers.

The communal approach also derives

from a decision to view the professional experience more broadly, by focusing on career as well as job. One of the disincentives and concerns for Jewish communal workers is inadequate career growth opportunities within their current organizations. This is particularly true in smaller communities and among workers who lack geographical mobility. By reconceptualizing human resource management within a community and breaking down competitive barriers, it becomes conceivable to move workers proactively through the communal system over their professional lifetimes. This already happens, naturally, to a limited degree and is a key retention strategy within the initiative.

Professional Excellence should serve as a catalyst to stimulate organizations to develop individual (as well as collaborative) programs and projects. The scope of the personnel challenge is far too large and complex to be owned or managed in a hierarchical way or by any single communal institution. Clearly, the Jewish Federation can play important advocacy, education, management, community organization, and resource development roles. However, ultimately the success of the initiative will depend on the degree to which individual organizations and their leaders devote themselves and their resources to personnel matters and develop policies, procedures, and programs that strengthen professional service within their institutions.

Professional Excellence should build on knowledge from other settings and consciously experiment to build that body of knowledge. Jewish communal organizations have largely ignored the substantial knowledge and expertise that exist within the human resource profession, many successful businesses and industries, as well as the rest of the non-profit and public sectors. Much is adaptable to the Jewish community. However, the community must be willing to engage in the challenging conceptual work needed to translate such expertise for use in our Jewish settings. Moreover, the community must be willing to accept experimenta-

tion as an important aspect of developing communal capacity. There needs to be a willingness to fail and to learn from those failures, as well as a drive to succeed.

A full statement of the goals and strategies that will guide the initial implementation of the initiative is provided in Appendix A.

CONCLUSION

The Professional Excellence initiative encompasses an ambitious but exciting vision. Initial reactions from a broad range of volunteer and professional leaders have been positive, and many have demonstrated a willingness to become involved and shape the initiative. Reactions from leaders of national Jewish organizations have likewise been encouraging. Beginning national-local partnerships are being formed. Federation's role in beginning and managing the initiative introduces an important new role for it as it seeks to add value to the communal system. This may represent an important evolution of the Federation mission.

St. Louis community leaders understand that this is a long-term (actually never-ending) process and priority. However, there is hope that by being proactive, real improvement is possible in the quantity and quality of professional staff and St. Louis can make an important contribution to the national effort. It is hoped that more local communities and individual organizations will develop similar initiatives and that national agencies and funders dramatically increase their investments in building the profession of Jewish communal service.

APPENDIX A

The Federation report—*Professional Excellence Goals, Strategies and Plan of Action*—itemized four broad, long-term goals and numerous strategies to achieve those goals. These frame year-to-year work planning and are reprinted in their entirety.

GOALS

1. Improve knowledge, skills, commitment, and performance of organizations, lay, and professional leaders toward the improvement of professional leadership and service, as the critical factor in providing services of excellence
2. Improve the knowledge, skills, commitment, and performance of Jewish organizational professionals so that they will be more effective in providing professional leadership and service
3. Make St. Louis the recognized leader in providing high-quality services through professionals who are engaged in challenging, rewarding, and satisfying professional employment and careers and thereby become a magnet community for aspiring Jewish professionals
4. Increase professional success (maximizing the return on our professional investment) by effectively selecting, hiring, managing, developing, and rewarding high-quality professionals who are and who feel committed, motivated, and fulfilled in their jobs and careers

STRATEGIES

- Educate lay and professional leaders (senior and middle management) on the nature, causes, and cures of the personnel crisis
- Advocate and inspire organizations to identify and adopt policies and best practices that enhance professional excellence and professional success
- Use Jewish Federation as a laboratory and model agency to test and implement policies and best practices
- Engage senior local lay and professional leadership in a process of continuous learning and knowledge development regarding the issues of professional excellence and professional success in the Jewish community
- Conduct ongoing research to understand dynamics of the personnel crisis in St.

Louis, compare St. Louis with other communities, and monitor and evaluate the progress of the initiative

- Disseminate knowledge nationally
- Encourage local organizations to invest seriously in effective orientation and training (knowledge and skill development) of new staff
- Create opportunities and a structure for community-wide training, networking, mentoring, and mutual support among professionals, creating a sense of professional community and empowering younger, newer professionals to become partners in their own professional development
- Promote organizational cooperation and reduce competitive barriers to encourage good professionals to continue their careers in St. Louis by moving, when necessary, from organization to organization.
- Create a community-wide training program for middle and senior managers focused on strengthening knowledge, skills, and commitment to supervisory management
- Organize and strengthen the promotion and marketing of Jewish professional work and opportunities in St. Louis, focusing primarily on the university campus, other Jewish programs (camps, birthright Israel, youth groups), smaller

Midwest communities, and national recruiters

- Develop cooperative, community-wide human resource functions in such areas as advertising, recruitment, screening, and hiring
- Develop major communal programs to support recruitment, development, and retention, such as a fund to assist new employees in paying off loans from graduate school, cooperative relationships among institutions to lower the cost of Jewish life for employees, and support of sabbaticals or a professional training institute in Israel
- Create a community-wide professional team to assist in communication and management of the initiative
- Maintain an Advisory Committee to provide consultation and input to the evolving initiative
- Partner with local institutions, national organizations, and other communities to leverage resources and share knowledge

REFERENCES

- Edell, David E. (2002, Fall). Professional recruitment and retention: A call to action. *Journal of Jewish Communal Service*.
- Moses, Larry S. (Fall, 2001). Recruitment and retention: Imperatives for the field of Jewish communal service. *Journal of Jewish Communal Service*.