

PROFESSIONAL LEADERS RESPOND

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This article answers one of the persistent calls from those of us in academe for more articles by practitioners reflecting on the changing nature of practice. It is an excellent example of self-reflective practice in which Wayne Feinstein takes the time to "get off the merry-go-round of fast-paced practice" in order to (1) reflect on the impact of a changing environment on a large-city federation, (2) identify the need for the organization to learn and change in response, and (3) explore the role of the executive director in fostering a learning organization by beginning with himself. This article reflects the confidence and experience of a veteran who is willing to lay out a series of complex issues and his own dilemmas on how to address them. This form of risk-taking is both rare and welcomed, especially for those of us in academe attempting to prepare the next generation of professionals without a steady flow of case material coming from practitioners.

As with any good article, it raises more questions than it answers. Many of the questions relate to concerns about the future viability of Jewish federations as they respond to powerful local, national, and international forces for change. While this respondent forum does not allow for a full discussion of the questions raised by the article, a listing of the major questions provides a context for addressing a few of them:

- Given the comments about the federation's last strategic plan, was it really a well-crafted document with sufficient attention to both visionary thinking and concrete implementation steps? Is strategic planning a viable planning/management tool for federations in a time of significant change?
- Given the description of "future search conferences" and the process of visioning, is this approach to planning and consensus building sufficient to identify a plan for implementation that has realistic action steps and outcomes to be measured?
- Given the role of market research in assessing the interests and needs of younger generations, does this data really address the core issues confronting the next generation of federation participants and leaders?
- Given the comments about the organizational change literature, is it possible to change the workplace culture of a federation through the clarification of values and beliefs, as well as changes in the leadership style of the executive director?

Each of these questions could lead to an article or case study. Given the limitations of space, the first and last questions receive the most attention in my response. While the specific problems with the original strategic plan were not identified, except that it was conducted before the arrival of the current executive director, it is possible that the plan either generated little ownership, was not sufficiently comprehensive, and/or did not identify specific implementation steps for lay leadership and staff to address.

It is a major challenge for Jewish communal organizations to implement any strategic plan, no matter how comprehensive and action-oriented. For many stakeholders, the plan is viewed as "something to do on top of current activities," and when it is viewed as an "add on," it is difficult to get things done in a timely manner. However, when a plan is viewed as central to the implementation of all future activities, it seems to get woven into the fabric of everyday work life and has a greater potential to succeed. It is not surprising that organizations that do little planning have difficulty implementing plans, since

there is little precedent for such thinking and action. Similarly, strategic plans, like job descriptions, need to be viewed as management tools designed to be modified as situations change and yet sufficiently clear about the core directions to be pursued over time. In essence, the new initiatives reflected in a strategic plan need to be incorporated into the job descriptions of both staff and lay leadership if the plan is to have any success in redirecting the energies of the organization's stakeholders. One of the biggest challenges is to transfer the investment and excitement experienced by those developing the plan to those who were not involved but are central to the implementation of the plan. As noted in the article,

The process, producing four volumes of findings and recommendations, had not struck roots with 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.

This level of investment in community planning deserves a more thorough analysis by addressing such questions as the following: Which constituency did not connect with the plan? What aspects of the reports were interesting and why? Where were the problems of superficiality most significant? And why was there no mandate to implement the recommendations? Exploring answers to these questions may also be important if a new set of lay leaders and professionals are in charge and have limited understanding of the goals and intentions of their predecessors.

Another question raised by the article relates to changes in the organizational culture of federations. As Schein (1993) has noted, mature organizational cultures create patterns of perception, thought, and feeling that predispose the organization to certain kinds of leadership. In addition, organizational leaders create cultures that, in turn, produce

their next generation of leaders. Federation leaders are usually drawn from those with fund-raising experience. Some are able to balance a strong sense of campaign marketing with a strong sense of organizational planning. If the annual fund-raising perspective dominates, however, organizational and strategic planning may be viewed as irrelevant. If the organizational planning perspective dominates, a plan could result with no clear marketing or fund-raising "buy-in" or mandate. It is possible that the San Francisco plan may not have reflected a sufficient balance. In addition, the use of the future search conference to develop a vision and set of core values suggests that these elements were not sufficiently addressed in the strategic plan.

One of the most interesting aspects of the change process was the director's decision to seek an outside personal coach. While some might view this as a sign of a professional in trouble, others hold the belief that it is primarily strong professionals and/or strong organizations that seek out help. The weak ones either do not recognize the need for help or do not have the strength to pursue self-assessment. This may also be a time in our country's history where it is increasingly acceptable to consult with others on sensitive and complex issues. Somehow, organizations have no difficulty seeking legal or financial advice when problems seem overwhelming. And yet, it has been increasingly difficult for executives to utilize outside consultation when an organization's future or identity has become unclear. Exploring the relationship between the organization's culture and its professional leadership represents a new horizon in the life of federations; Wayne Feinstein is to be commended for disclosing his feelings and describing how he involved a coach in learning more about his leadership style and its impact on staff and lay leaders, his managerial style with respect to visibility and accessibility, and his team-building and relationship-building capacities. As this exploration only focused on the federation director, only a partial picture emerges. What

about the leadership styles of key lay leaders and senior managers? Without a more comprehensive view of the leadership styles of both lay leaders and senior staff, it is difficult to see how the lay-professional partnership can be strengthened or staff roles and responsibilities restructured.

As noted in the conclusion of the article, this case study describes a "work in progress" that identifies "the early stage of a multi-year effort." The questions raised in this commentary were stimulated by this challenging and

innovative change process. It would be wonderful if this "work in progress" were described again in the years ahead. We all have much to learn about the challenges and complexities of guiding organizational change. We are fortunate to have received this dispatch from the frontlines of organizational change and renewal.

REFERENCE

Schein, E. H. (1993). *Organizational culture and leadership*. San Francisco: Jossey-Bass.

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ALLAN FINKELSTEIN

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Wayne Feinstein's article provides the Jewish communal field with an unusually introspective and, at the same time, broad view of the opportunities for meaningful change that exist. Each of us faces a reality in which internal, often manageable, realities combine with external challenges to change that are often acknowledged, but not properly balanced in our management of organizational change.

Wayne's primary contribution, in my view, is to reflect on two elements that are all too often missing from traditional efforts to "restructure, redefine, revision, and remake" our agencies. The first deals with the refreshing look at his own function as an executive, which is rarely acknowledged in such a public way; the second focuses on a new approach to integrating key stakeholders into the process. The latter is by no means a new concept, but there are elements in the

way this article reflects on them that are new and worthy of consideration.

Numerous articles have been written on executive function, many of which mention such time-honored concepts as "conscious use of self" and the ongoing distinction between manager and leader. However, it is difficult to recall anyone in our field dealing in such a frontal way with the need for the executive to seek feedback from stakeholders. We would all agree that board, staff, and agencies are key stakeholders in the federation system. In the normal course of events, neither staff nor agency leaders would be considered as having input into discussions of the leadership style of the federation executive, and certainly not in confidential and candid interviews. If we are to truly build a new and "out of the box" system of communal leadership, such stakeholders must be engaged on a *regular and ongoing* basis in such

a dialogue. In most cases, the perceived "power" of the chief professional at federation has led to assumptions—and to practice—that eliminate any such opportunity for feedback or input. Our traditional system has been all too formal, with specific "roles" being played by each of the stakeholders. The feedback described in this article is admirable. It would be interesting to have a follow-up piece done with each of the various stakeholders to test the reality of the experience—perhaps a year later—from their various points of view.

Our current system assumes, with some rigidity, that all agencies, for example, must be treated exactly the same. It is based on an allocations model—with goals of "fairness" and "process"—rather than acknowledging that the needs of the community and the goals and objectives of the federation might better be served by unique and differentiated relationships with each agency that change over time. This approach would be served well by the system outlined in this article.

The use of a personal coach has also become popular in certain settings in the business world, but is only recently being considered in our field. Isn't it interesting that a system in which most executives were trained—the supervisory model—in graduate school and early career assumes that executives can "go it on their own," and that some more formalized support system is not equally as important for the executives as it is for younger, less experienced staff. We often speak of the need for executive evaluation and management objectives. We have, perhaps naively, assumed that the executive will take the results of these evaluations and objective setting, and can effectively integrate them into practice without any honest feedback and objective challenge and dialogue. I, for one, am delighted that Wayne has put together these elements—feedback from stakeholders on executive style and function with the use of a personal coach—to challenge himself and us to open our thinking.

The whole area of involvement of key stakeholders—beginning with the "future search conference" and leading to the new vision of the federation—is, again, not a new idea. We have all had board retreats, strategic planning processes, evaluations, and more, all intended to *engage stakeholders* and to *establish buy-in*. If we were to observe most community planning processes to date, I believe that they would be "top down" efforts, primarily engaging board leaders and lead federation staff, with "input" from agencies. Wayne seems to be suggesting that each stakeholder group is unique unto itself, deserving of recognition that its input is of equal importance to that of the federation board. This is truly new. If this were integrated into the "muscle" of federation/community planning and function, it would potentially revolutionize the way we work, and could go a long way toward eliminating trust and credibility issues that dominate much of the communal mindset. I am not certain that this was Wayne's long-term intent in writing this article. It is clearly an effort to redefine the San Francisco federation at a given time in its history. The question is whether or not he intends to integrate this intensive and inclusive approach on a long-term basis.

This, like any change process, requires as much, if not more, effort in the implementation phase than during the planning process itself. Wayne tell us that "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." I for one look forward eagerly to learning whether that new world was what the explorers had envisioned at that initial "future search conference." If this model has played out as described, then all of us have a great deal to learn from it in looking at our own institutions and, more important, how we all interface with each other and with our new, different, and rapidly emerging stakeholders.

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Wayne Feinstein is to be commended for a forward-looking, risk-taking article that looks at some of the vital management issues confronting our agencies and institutions today. He exposed his practice and his personal and organizational style in a way rarely seen, and he deserves to be congratulated.

Management and organization styles come and go. New books appear daily, describing the best way to manage an organization and the most effective management style. Each new book takes issue with the ones before it, and each offers its own set of theories as to how to manage. Are decisions made from the top down? Is the organizational chart flat? How many layers of management exist between line staff and the CEO? All of these questions are of vital importance, or of no import, depending on who wrote the book.

In reality, of course, all these questions, as well as many others that help us to be more effective in our work, are valuable to ask and explore. It really is vital to have a framework to understand how to manage today's complex social enterprises. It is critical to have a conceptualized basis for deciding what operations and methods to use to achieve the goals of our agencies.

It is no great revelation to state that not-for-profits are different than for-profits, yet it is a fact not to be forgotten as agencies look for new sources of income to finance their endeavors. The "bottom line" of the not-for-profit enterprise must always be recounted in human terms. Who has been helped? What good was accomplished, and for how many? These are the vital questions to be answered as agency efforts are recounted to the board and to the public. It is much too easy for a not-for-profit manager to get caught up in the day-to-day need to keep costs under control, to maximize income, and to minimize expenses, and forget the reason for those cost controls; to forget why the agency is in busi-

ness. Today's relatively new field of "social entrepreneurship" emphasizes that the goal of increased income is "more mission."

Wayne Feinstein reminds us that our work is with people. We have a responsibility to manage our organizations humanely, even while keeping our eye on the profit-and-loss statement. How we do this is the challenge. Today's reality is that the truth no longer resides with one individual (if it ever did). Today's efforts must be team-focused. Groupware, those computer software products that allow teams to work jointly on projects from diverse locations, are among the fast-growing areas of enterprise. The team approach to problem solving is once again appearing in the management literature.

Our work is most effective when it is inclusive and broad-based. This requires both staff teams to focus on problem areas and inter-agency teams to concentrate on developing solutions to complex community problems.

The tendency of boards is to concentrate on the here-and-now. Their term of office is time-limited by the bylaws, and most often board members look to make their impact in the short-term.

Our job as professionals is to help them take a broader perspective, to look to the greater good of the community over a longer time frame than a two-year term. This is best accomplished when we break down not only intra-agency barriers but inter-agency barriers as well. It is not enough to work effectively within each institution. We must learn to work effectively across agency barriers. Interagency planning groups for the short and long-term are a must, as are think tank efforts that look to the future of our communities without regard for the institutional barrier.

This article puts us on alert. Times are changing; styles are changing. Now it is up to us to change with them.

HOWARD E. CHARISH

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It is virtually impossible to pick up an article or book today on the life of an organization and not find the topic of change discussed. The flux in which both the corporate and the not-for-profit world find themselves is widely detailed. Change efforts are deciphered from the top down and bottom up. For some, events are occurring so quickly that they can hardly be absorbed. For others, the need to act is so urgent that forethought and planning are abandoned for quick fixes. However it comes, this rush for answers is found amid a true quest for sustaining and enhancing commitment during turbulent times.

In his article, Wayne Feinstein provides an invaluable mirror to reflect current conditions. He rightly points out that the anxiety leaders are experiencing now is caused by the fact that the founding premises of our organizations no longer conjure up the loyalty of yesteryear. As a consequence, there has been a proliferation of strategic plans. If we are in the field long enough, we are bound to have participated in a long-range plan to renew our organization. Yet, so many times, while the research has been done, the proposed recommendations have not caused the resultant transformation. Such was the case when Feinstein assumed the helm as executive of the San Francisco federation. Despite doing a comprehensive study, the results and changes necessary were not transfused into the cultural bloodstream. What he faced was high paper production and low stakeholder buy-in. The federation realized that new messages, new constituents, and new values had emerged that warranted rethinking how it did business.

Feinstein provides a useful review of the literature that advises the following, among other things: create a vision from the heart, develop quick wins, stay focused, and dig in. He also charges the manager not to underestimate the involvement of stakeholders. While

the quotes in this section are aptly chosen, the most valuable contribution of the article is the description of the change process at the federation itself. Even more extraordinary than his reporting of the organizational realignment is his description of his own self-alignment. Here Feinstein invites us not only into the executive suite to understand the change dynamics but also into the executive psyche to learn first hand what he faced in order to accomplish the vision. While I wondered what specifically prompted him to engage a personal coach, I am amazed by the candor and courage of his self-discovery. I cannot ever remember reading so revelatory an analysis by a colleague. It makes this article, in my mind, required reading for any executive contemplating comprehensive change. We can all learn from the advice Feinstein received, as well as from his personal reaction and behavior modifications.

Feinstein does not shy away from sharing the results of what most of us would consider a high-risk enterprise. It is obvious that Feinstein understood that in order to restore people to the heart of his organization he had to start with himself. He had to lead the way; he had to go first. By doing so, he gained the capacity to encourage the hearts of his staff, his volunteers, and his agency cohorts. He instilled confidence by modeling. He demonstrated caring, which is the most important and most difficult practice to exhibit. Whether one calls it momentum or performance, here lies the way for leaders to inspire progress. In his concluding remarks, even the language he uses connotes his new-found recognition of the importance of setting the example: every day the leader must manifest passionate commitment.

In order to lead healthy, vibrant organizations, each of us must examine our inner resources. By telling his story, Feinstein has provided a powerful lesson in true leadership. Bravo!

FERNE KATLEMAN

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It is no wonder that many expensive (and expensive) strategic planning reports sit on executive office shelves or in file cabinets gathering dust, their recommendations unimplemented. Motivated by lay and professional leadership who recognize the need for agency change, reinvention, or "out-of-the-box thinking," these reports represent a considerable outlay of time, money, and effort. Unfortunately, too many have apparently undervalued or underutilized the lessons so well delineated in Wayne Feinstein's article.

Feinstein uses the analogy of a chair with four strong legs to describe the essential components in the process of creating meaningful institutional change. The legs represent (1) leadership style, (2) staff empowerment, (3) board investment, and (4) partnership with service providers. One might say that failed attempts at planning and implementation are often chairs perched on weak and wobbly legs, at best. Having participated in several efforts to mobilize either agency or federation renewal and change, both as a member of executive staffs and as a volunteer, I can appreciate the complexity of managing the entire enterprise from its inception through implementation, evaluation, and revisioning. My colleagues who have responded to the Feinstein article have more than adequately commented on the major points that emerge as critical to creating an effective system for achieving change; I see no need to repeat their contributions, especially since I fully agree with them. Instead, I discuss here two issues that I believe would benefit from further exploration: staff empowerment and board investment.

Feinstein points to several strategies used to develop staff buy-in, including engaging staff at all levels "in helping generate personnel policies...with regard to workplace values, teamwork, and identification of

the obstacles to more effective work and then working together to change the way federations function." The efforts to align staff as key stakeholders invested in the outcomes of the change process seem right on target. In addition to those strategies described, thought should be given to techniques that would help management staff and others focus on their own leadership styles as well. Feinstein stresses the important work he is doing on his own leadership skills with the aid of a coach; can other staff benefit from similar (though not necessarily the same) experiences? Is it possible for an agency to fill the gap left by the absence of good supervision concerned with professional growth and development? Might the field create a much-needed methodology in this area?

Buy-in or investment is essential for both board and staff. The more deeply shared the vision, goals, objectives, and strategies, the more chance there is for real achievement and movement. Developing a common language of change and a sophistication based on knowledge and understanding are necessary components in preparing leadership to function as agents of change. Therefore, might training of leadership that is focused on planning and implementation skills be codified into a "curriculum" to provide the community with a more educated, skilled cadre of lay leaders?

It is apparent that there are no short cuts to building the organizations needed as we enter the next period of Jewish communal life. Feinstein has shown us it takes vision, wisdom, hard work, and courage—and the skill to engage in the right amount of process, planning, and action.

Wayne Feinstein is to be applauded for his thoughtful, informative, even inspirational presentation and analysis. It is an honest, straightforward offering by a reflective practitioner of Jewish communal service willing to share his knowledge and experience, his

successes and frustrations, for the benefit of professionals and institutions engaged in Jewish community building. While his focus is the San Francisco Jewish Community Federation, Feinstein's article holds much rel-

evance for the not-for-profit sector in general, and for the Jewish organizational world in particular. I eagerly await the next chapter in this "work in progress."

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PRESIDENT