

Implications for the Profession of the Review of the Council of Jewish Federations*

Robert I. Hiller

Executive Vice-President, Council of Jewish Federations, New York

Introduction

On Tuesday, September 4, 1979, Carmi Schwartz, Darrell Friedman, and I shall have marched into the Council of Jewish Federations office and be joined by Charlie Zibbell.

The world will have little noted nor will it long remember this historic moment. We who marched will, however. This will have been our first day on the job for CJF as its new management team.

We have come with humility because the CJF review has established the blueprint for the CJF for the foreseeable future. We have come with *confidence* because each of us has had a good experience in working in local Federations.

We have come with *excitement* because our colleagues have urged us, pushed us, encouraged us and promised us help and cooperation. We believe as a small professional management team working with our colleagues in the field locally and nationally that together we may be able to make a difference.

Sidney Vincent's brilliant "Highlights piece" on the Review, on its opening page, states, "It is, therefore, not surprising that when it was decided in 1976 to create a Committee to Review the Purpose, Function, Program and Organization of the Council, the really fundamental questions raised, under vastly changed and expanded circumstances, were the same ones that originally led to its founding:

'What can the Council do for our Federation?'

'What can it do for our community?'

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I now add to this the substance of today's remarks: What can the new CJF do for the professional in the Jewish communal field and what can the professional do for the CJF?

Let's start with the major recommendations of the Review that bear upon these two questions and then conclude with the "implications" for each of us as professionals.

Major Recommendations

In general, it is recommended that the Council should continue and develop further the following functions:

1. Help Federations enlarge their financial resources.
2. Help Federations develop more efficient, economical and effective community services.
3. Define standards.
4. Assist Federations to develop highest quality leadership.
5. Recruit, train, provide highest quality professional staffing for Federations.
6. Intensify involvement of Community Federations in Council's decision-making, with improved, ongoing two-way communication.
7. Where there is broad consensus, and where it is appropriate, speak and act in behalf of Federations on their national and international concerns and responsibilities.
8. Coöperate with appropriate organizations to help strengthen Jewish communities and Israel.
9. Help achieve greater collaboration among national Jewish organizations on Federation-related responsibilities.
10. Take leadership nationally, and through Federations locally, in advancing the general welfare of total community.
11. Develop long-range planning capabilities, locally in communities and nationally in CJF,

to anticipate changes and to define basic goals and program.

In the Review process, Federation leaders repeatedly stressed the desire for more intensive, comprehensive CJF services to their Federations.

1. To help them reassess their overall structures, procedures and relationships.

2. To assist in the organization, planning and analysis of fund raising and to aim for increased cooperation and coordination with UJA.

3. To assist in building Federation endowment Funds.

4. To refine budgeting procedures, address current and future priorities and not only past precedents.

These Federation leaders, both lay and professional, encouraged CJF to make sure that community planning dealing with the critical issues confronting local communities receive appropriate attention—such issues as:

1. Aging.
2. Vocational patterns.
3. Jewish identification.
4. Intermarriage.
5. Single adults.
6. Single parent families.
7. Quality of Jewish education and need to plan and finance high quality Jewish education.
8. Suburbs and satellite communities.
9. Relationships of small cities to neighboring large cities.
10. Sun-belt areas.
11. Strengthening capacity of Council to help communities.
12. Take leadership role in assuring creative Jewish survival.

One among many recommendations is that every Federation should be served by an assigned CJF staff consultant who will visit the community regularly, coordinate the services of other CJF staff members and volunteers, and assure the required follow-up and continuity of CJF services.

The Review further says that CJF should develop standards which Federations can use

to assess and evaluate their programs and services.

CJF should explore the proposal for a national long-range planning mechanism.

The Review findings re-emphasize the central importance of volunteer leaders and professional staffs as a primary strength of Federations—and the responsibility of CJF to help communities enhance these vital human resources.

The Review emphasizes that delegates from each Federation should be chosen by their communities at the beginning of the calendar year, rather than just prior to the November Assembly so that they can be involved in the work of the CJF throughout the year in the national committees and in other capacities dealing with the major issues.

The Review highlights that CJF should help Federations to adapt the most productive procedures in recruiting, training and utilizing the ablest young men and women in preparation for Jewish communal leadership; deepening their understanding of Jewish purpose, and the skills of leadership; and enhancing, too, the understanding and skills of veteran leadership.

The current problems in staffing of Federations were deemed to be so important that very early in the Review process, a special Task Force was set up by CJF to analyze the needs and to formulate recommendations. Their findings and recommendations are embodied in a separate report, utilizing the facts and advice obtained in the most comprehensive programs required of CJF and community Federations to recruit beginning and mid-career levels; to provide basic professional education and continuing in-service training; suggest “second-track” training for mid-career persons; and recommend refined placement services to help Federations fill executive and other staff vacancies.

Implications for the Profession

Now that we have covered some of the major recommendations, those perhaps most pertinent to the purpose of this talk, I want to

deal with some of the implications for us as professionals, covering only three major areas:

1. C.J.F. Community Consultation
2. Year-Round Delegates
3. Personnel and Training

It is my opinion that everything that transpires in connection with C.J.F. affects our profession. This is logical because we are talking about our local community instruments, the Federations. But my intent, here, is not to generalize but rather to zero in on the three specific areas.

C.J.F. Community Consultation

The Review tells us several things "loud and clear." One of the most consistent comments was the necessity for C.J.F. to provide competent and ongoing service to local Federations. What the Review recommends is a consultant who will give priority to a continuing relationship to the local community. The priority deals with the relationship of laymen and professionals both nationally and at the local level. I view the system almost in the way a financial firm or an advertising agency views the servicing of its clients. As a matter of fact, I still have difficulty in using the terminology of the Review in calling the regular staff person working with a community a community consultant. I see this person as an account executive. The local Federation is this community consultant's account for whom he must provide service. In order to do this, he must have the confidence of the local executive. He must have the local executive understand that it is the consultant's responsibility to orchestrate those services that are required outside of the community to be brought to the community at the appropriate time and with the appropriate personnel that is mutually agreed upon. Equally important is the fact that he must have a continuing relationship with the community because it is his responsibility to see that the local community gets what it needs in order to do the kind of job that is essential for it.

Now this obviously is an over-simplification

of the process, but the description I have given is the basic plan of the process. It has unusual implications for our profession.

First of all, it sets forth our national organization, the C.J.F., as a true service organization for the local community. It means that a local Federation professional should have an ongoing relationship with his representative of that national organization, C.J.F., to assist him in doing the kind of job that should be done in that local community. This has as one of its major ramifications the necessity for all of us in the local community to be willing to look at appropriate standards or guidelines in order to measure what we are doing locally against some norm. These norms obviously are geared for professional-to-professional consultation.

The second aspect of this is that the professional in the local community must have a thorough understanding of what the limitations as well as the expectations may be for national service.

Third, both the C.J.F. professional and the local executive must understand that they have a common interest and must develop the working relationship that the local professional feels is essential to achieving this.

Fourth, the professional at the local level must recognize that his scope of responsibility extends beyond the local community and that he has a responsibility to moving his skills and his lay leadership into arenas other than the local level to fulfill it.

Year-Round Delegates

This leads me logically to the second major area on which I wish to concentrate, and that is the year-round delegates. If the service provided by the C.J.F. is to be of value, it must reflect the thinking and the input of not only local professionals but also of local lay leaders. In order to accomplish this, every Federation professional must assist in developing the system of providing local leadership to serve and to bring input to the national scene. What has been developed is a plan to have year-round delegates. These would be the

lay leaders who are in key positions in the local community appointed or elected at the beginning of each year by the local Federation. These delegates, in a number to which each community would be entitled, would serve as a body to which the community consultant would bring information and seek input from time to time on his local visits. It would serve as the group of people from which committee and other major appointments would be made by the President of CJF. It would serve as that leadership constituency in the local community for whom all major information would be made available so that they would be made knowledgeable about the critical issues confronting the national Jewish and the local Jewish communities.

The implications of this for the professional in the local community are critical. They are critical because without that professional's total understanding of the importance of this to his local community, and hence to himself as a professional, the system cannot function. If he has this understanding, he then will be able to use his professional skills to implement this system of lay relationship to our national organization. The benefits for the local community are enormous. As professionals, we all will have to develop a confidence in one another's roles and be able to work out the necessary individualized relationships that are essential for each community, bearing in mind each community's characteristics, the local executive's skills and abilities, and the level of cooperation that is required to achieve the necessary results.

These first two items (1) the community consultant and (2) year-round delegates, in my opinion go hand-in-hand. They are one and the same. They are in essence the working relationship of a national organization with its constituency. They are elements by which the local laymen and local professional may derive the greatest gain from their national organization and make the greatest contribution to strengthening it.

These are the elements that create the mechanism for two-way communication: for

service to the local community, for impact and participation on our national instrument.

The mechanism will work only to the degree that the local executive wants it to work and gives his time, attention and skills to attaining the maximum from it.

The implication is clearly that we have a system requiring local-national total cooperation. This logically leads me to the third major area for discussion, i.e., the professional, the people who will make our system deliver for our Jewish community.

Personnel and Training

Let us look very specifically at the Review proposal that CJF should provide a comprehensive Personnel Development Program to include:

1.—a concerted, ongoing recruitment effort to search out and attract individuals with high potential for success in Federation careers.

2.—continuation and expansion, as needs may dictate, of FEREP, the Federation Executive Recruitment and Education Program, as the primary track for preparing young professionals for entry level positions.

3.—development of an Alternative Track Program for mature, experienced individuals from related professions and businesses offering opportunity for intensive training to qualify them for immediate assumption of executive leadership roles in Federations.

4.—development of a "Training Center Without Walls" offering a full range of continuing education programs, institutes and seminars related to upgrading professional knowledge and skills (more about this below).

5.—provision of consultation to Federations for development of local in-service training programs.

6.—continuation of consultation services to individual professionals related to career counselling and career development.

In addition, CJF through its general and specialized staff, should continue to refine and expand its services to Federations relating to:

—Referral and Placement

—Consultation on Personnel Practices and Function

—Standards for Personnel Practices

And CJF should expand its Personnel Services Department to provide the manpower and fiscal resources necessary to implement the recommendations.

For us, one of the most important recommendations is the Training Center Without Walls. Let's explore more definitively what is meant.

It is proposed that a post-employment training program be developed to achieve these major goals:

1. Continuing education for staff currently employed by Federations and aimed at enhancing practice and updating knowledge, philosophy, and skills. As in any profession, those engaged in that profession should be expected to continue learning throughout their careers and should grow in their capabilities and understanding of the mission of their field. With this as a basis, CJF should develop a continuing education program which focuses on skills development in the areas of administration, fiscal management, campaigning, planning, budgeting, endowment development, leadership development, board development, and supervision. It should also develop educational programs geared to management effectiveness, enhancing work with lay leadership processes and their understanding of Jewish community issues and the Jewish Federation.

2. Education aimed at providing a basis for promotional opportunities in managerial area, i.e., executive positions.

The format for a continuing education program should include:

- A. New *Worker* Orientation Programs after six to eight months on the job, mounted by CJF for the purposes of: 1) integration of practice experiences with practice theory. 2) orientation to national issues dealt with, by or affecting local Federations. 3) connection with goals and philosophy of the Federation "movement" and identification with the broad scope of the field.

- B. New *Executive* Orientation Seminars

- C. For current staff, practice enhancement and knowledge up-dating courses, seminars and workshops in:

1. Skills development in campaigning, planning, budgeting, leadership development and basic development.

2. Management effectiveness: a) goal setting and priorities determination, b) staff management supervision, delegation, motivation, development, c) management styles—use of self, understanding others, d) management by objectives, e) data management, f) fiscal management.

3. Enhancing work with lay leadership processes: a) decision-making, b) recruitment and leadership development, c) relationships: power, commitment, vested interests, etc.

The Review further proposes that CJF should provide consultation to Federations for development of local in-service training programs, and that, since a majority of Federation professionals have aspirations for upward mobility within the field as well as a long-time commitment to careers in Federations, it is important that CJF be available to provide guidance and counselling, upon request, as the individual professional faces key decision-making junctures relating to career goals, directions and options.

The implications of the Personnel Recommendations are even more of a watershed than the other Review items. They are mind boggling. But they are so simply logical. First, we are moving into the era where *continuing education* for all Federation personnel will become the norm. It is obvious that just as in the "old days" an MSW was the credential, in the future, continuing education under certified CJF programs will be a requirement for upward mobility. As professionals—from 16 executives all the way to assistant planners of a staff—we will need to keep ourselves *au courant just as those in other professions must do*. This means our Council will have to create the training programs. This then should give us opportunity for professional advancement which means better service to the community.

Second, the Review talks of *Alternative Track*. This means a utilization of other professional skills through a recruitment program and a training program that will bring a *new* kind of professional to our field—businessman, lawyer, rabbi, teacher—brought into our field and provided with a very specialized and intensive training.

The implications are several:

1. We must open our minds and hearts to this “new breed” because the Jewish community needs them.

2. We must recognize that *they* will also create new standards of excellence because of what they bring to our field.

This infusion is good for all of us.

The Review recognizes that *personnel* make this system function and that we make it function at whatever level we perform. The implication of our responsibility therefore is enormous. We must each do a major part in a continuous *upgrading of our own skills*; we must be a partner with CJF in *recruiting new people* for our field, and we must make our input in the *education and training* of other professionals. All of this is essential if the Jewish community is to move forward with vigor and quality.

Conclusion

Expectation and Reality

I conclude by pointing out that the budget recommendation for the “new CJF” is not only modest but a phased-in budget. All of the critical additions we talk of will take three to four years to even get under way. This is because the budget provides for an evolution of the change. This means all of us will need patience. I would have preferred a *quantum jump* with implementation much more rapid. So my reality is that it will place a major responsibility on all to interpret the deliberate pace of change, pointing out the ultimate goals.

We all will need patience, more difficult at my age than that of most in the field. I conclude by reiterating the priorities from the more than one hundred recommendations and suggestions in the Review:

1. Service to the local federation—service the account.

2. Development of the year-round delegate—two-way communication.

3. Personnel development—the essential ingredient to the future of the system.

As can be seen, each of these priorities is about professionals. With full and utmost cooperation—without which nothing will happen—we can make a difference.