

LEARNING TO LEAD:  
TRAINING AND LEADERSHIP DEVELOPMENT  
FOR FEDERATION BOARD MEMBERS

By

Becka Ross

---

Capstone project submitted in partial fulfillment of the requirements for the joint masters  
degree in Jewish Nonprofit Management and Jewish Education

February 2014

HEBREW UNION COLLEGE - JEWISH INSTITUTE OF RELIGION  
LOS ANGELES SCHOOL

SCHOOL OF JEWISH NONPROFIT MANAGEMENT  
RHEA HIRSCH SCHOOL OF EDUCATION

LEARNING TO LEAD:  
TRAINING AND LEADERSHIP DEVELOPMENT  
FOR FEDERATION BOARD MEMBERS

Becka Ross

Approved By:

A handwritten signature in black ink, appearing to read "Sarah Bern", written over a horizontal line.

Advisor

A handwritten signature in black ink, appearing to read "Raymond Isbyal", written over a horizontal line.

Director, SJNM

A handwritten signature in black ink, appearing to read "Michael Weiss", written over a horizontal line.

Director, RHSOE

## Table of Contents

I. Abstract	4
II. Introduction	5
III. Methodology	14
IV. Jewish Federation Board Background	15
V. Findings	18
VI. Conclusion and Recommendations	24
VII. Bibliography	28
XIII. Appendix A	30

## **Abstract**

How to orient and train board members for work in a Jewish non-profit is a frequently discussed topic in today's Jewish community. Numerous articles and books have been published and training programs have been created to achieve the goal of having a highly effective, trained, and cohesive board. Using the Jewish Federation of Greater Los Angeles as a case study, this project examines what orientation, trainings, and leadership development opportunities are available for board members. Research was compiled on current trends regarding board member selection and service, including who is chosen to be on a board and what opportunities they have to continue to learn and grow as board members. Original research, through one-on-one interviews, was then conducted with board members and Federation professionals of the Los Angeles Jewish Federation, to see what the current practices are regarding the training of board members. The research shows that currently there are no standard practices in place for the preparation of board members, largely because the professionals and lay leaders feel as though such preparation is not necessarily needed. After also looking at what other Federations around the country offer for their board members, this paper provides recommendations for the LA Jewish Federation to strengthen its current board leadership, as well as how other Federations and Jewish non-profits can use this information for their own training of board members.

## **Introduction**

It was a sunny, spring afternoon in Los Angeles, and approximately ten Jewish non-profit lay leaders gathered to discuss lay-professional relationships with Hebrew Union College Jewish non-profit management students as part of a mentoring program that the school offers. The lay leaders were asked what Jewish professionals could be doing to help the lay leaders in their roles. While many things were stated, one common theme emerged: the lay leaders all wished they had been better prepared when asked to sit on their first board. They had various concerns, including not knowing enough about the organization, not knowing what their role was as a board member, and not knowing how or when to ask the questions that needed to be asked. This discussion, as well as my interest in the Jewish Federation field, led me to research what resources and training development programs are presently available to Jewish Federation board members, and how current practices can be improved upon.

Today, both Jewish and non-Jewish non-profits are concerned about the future training and ongoing leadership development of lay leaders (Lewis, 2004, p. 151). This is especially true concerning board members who have a fiduciary obligation to the organization they are serving. Legally, all 501(c)(3) organizations are required to have a board of directors that “acts on behalf of the general public, does not stand to gain financially from charitable activities of the organization, and exists to provide prudent oversight of the overall operations and direction of the organization” (Linnell, Radosevich, & Spack, 2002, p. 44). The board of directors (also known as a board of governors, board of trustees or just “the board”) has one fundamental responsibility: to govern the organization to the best of their ability. Board members are there to monitor the organization’s operation and to make sure it is fulfilling its mission (Chait & Taylor, 2007; Linnell, Radosevich, & Spack, 2002 p. 99). This fundamental responsibility can be broken

up into three legal duties of the board member: a duty of care—acting personally in a way that the board member believes is best for the organization; a duty of loyalty—making decisions they believe are in the best interest of the organization; and a duty of obedience—following all laws, by-laws, and policies set forth by the organization (Linnell, Radosevich, & Spack, 2002, p. 44).

Board members are vitally important to the success of an organization, and non-profits are constantly searching for ways to find, attract, and retain the best possible board members. All organizations have an ideal board member in mind. Misha Galperin (2012), CEO of the Jewish Federation of Greater Washington, describes his ideal lay leader as being smart, confident, reliable, open-minded, respectful, a risk-taker, and able to achieve what he/she sets out to do (p. 32-33). Similarly, Marc Blattner, CEO of the Jewish Federation of Greater Portland, says that a great board member has a passion for, and commitment to, the organization, is willing to roll up his/her sleeves and get involved, actively participates in a “hands-on” way, utilizes personal skills and expertise to make informed decisions, and supports fundraising efforts of the organization (personal communication, June 2013). Organizations are looking for board members who can provide one of the “Three W’s”—wealth, wisdom, or work (Beck, 1999, p. 210). (One might wonder why only one of the “Three W’s” is enough, but more on that later.) Organizations desire effective board members who look for ways to increase their knowledge through professional development, and who act upon the idea of lifelong learning. These board members understand that there is always more that they can learn (Blumsack & Gordon, 2006, p. 210). In sum, non-profits are looking for board members who have the leadership skills to successfully run an organization, work in partnership with the professionals, and keep learning and improving upon their current leadership skills.

However, most organizations do not seem to “practice what they preach” when seeking out board members. Historically, organizations have often searched for board members in two ways: looking at members of well-known and philanthropic families, or looking at people who already serve on other boards (Beck, 1999, p. 213). Board membership in the past has often been a reflection of one’s elite social status and has often gone hand in hand with philanthropic activity (Beck, 1999, p. 210). However, having financial resources does not necessarily make one a good leader, and when organizations rely on those already on other boards, they run the risk of “burning out” those lay leaders.

Non-profit leaders, including lay leaders, should have the great ideas and deep passions needed to keep our Jewish community strong and vibrant. However, there is a need to differentiate between donors, volunteers, and actual leaders (Galperin, 2012, p. xxiv). Many non-profits treat every member of their organization as a potential leader, regardless of skills or talents, and put everyone on the path towards leading the organization (Lewis, 2004, p. 153; Galperin, 2012, p. 31). Differentiating between the roles of leader, donor, and volunteer will help organizations find the leaders who can be most successful in their positions and responsibilities. The community needs to know what it means to be a leader and what is expected of our lay leadership.

Organizations often chose people to lead for the wrong reasons: their giving history, their successes outside of the non-profit world, or that they merely showed up to the table (Galperin, 2012, xxiv). Jim Collins (2001) notes the need to make sure we “get the right people on the bus” (p. 41). This includes having people who are able to articulate what motivates them and why they want to lead (Galperin, 2012, p. xix), as well as people with strong Jewish roots and an intensive Jewish education (Wexler & Solomon, 1999, p. 5). There is a fear that if Jewish organizations

ask too much of our leaders, including having the skills and time commitment to be a leader, they won't have anyone to serve on the board or committees (ibid., p. 14). By settling for just those whose sole attributes are their availability and willingness to serve, organizations create a risk of mediocrity, and a board with no real chance to effectively do its job and implement the changes that need to be made.

Besides choosing the "wrong" people to lead organizations, when the "right" people are chosen, organizations too often do not give them the tools needed to be effective leaders. Organizations frequently do not define what the board's responsibility is, and what are the responsibilities expected of them in working with the professionals employed by the organization. Lay leaders are not taught what it means to govern, an essential for a person to be an effective board member (Galperin, 2012, p. 67). Board members are also not always given the necessary information about the organization that they need to effectively lead (Wilson in Blumsack & Gordon, 2006, p. 38); it is just assumed that they are getting that information from other sources or their past volunteer experiences. Board members are not given thoughtful and stated standards for what it means to be in their role, and they are unsure of what work they are supposed to take on (Wexler and Solomon, 1999, p. 10). This can lead to burnout on boards, where just a few members of the board take on a majority of the work (Beck, 1999, p. 216). People are often brought onto boards because of the skills they possess in their personal or professional lives. However, an organization cannot rely on those skills alone but must "recognize, cultivate, and create the right environment for these talents to surface" (Galperin, 2012, p. xxiii).

Today's lay leaders in the Jewish non-profit world often do not know what it is that the organization's professionals do. This causes lay leaders to have trouble understanding how their



duties complement the responsibilities of the professionals. Partnerships are not created between the lay leaders and the professionals; there is no time investment or work put into creating relationships between the two parties (ibid., p. 21, 29).

When leaders are not taught what their roles and responsibilities should be, they focus too often on making people happy, and not enough on what the organization needs (Galperin, 2012, p. 66). In a study by Blumsack and Gordon of new school board members and information/skills they need to be effective leaders, board members stated that when they first began their board service, they thought they would and should be able to make everyone happy. Mark Metzger, a school board member in Illinois noted, "New board members tend to think customer satisfaction is their job. It isn't. A high-functioning board is focused on ownership issues, not customer issues" (Blumsack & Gordon, 2006, p. 34). Jewish non-profit board members also need to make sure that they focus on addressing their entity's organizational needs, rather than the individual interests of particular donors or members.

In recent years, Jewish non-profit organizations have realized the need for leadership development programs for lay leaders, including board members. National programs, such as the Wexner Heritage program, have been created to train lay leaders to be effective communal leaders. Also, organizations such as Federations and synagogues are creating internal leadership programs for their own members. While these programs have been lauded with some national success, there is still work to be done (Lewis, 2004, p. 157).

The organizations implementing these programs must define the difference between volunteer training and leadership development (ibid., p. 157). Additionally, current board development trainings frequently skip over the interpersonal factor of how to create a cohesive team among all the board members given their different backgrounds and priorities (Radbourne,

1993, p. 212). Without this interpersonal training, many board members do not know how to put aside their personal priorities and work in a group setting for the unity of the organization's goals.

Many board members and the training programs they attend often confuse Jewish literacy with Jewish leadership training (Beck, 1999, p. 212). Jewish training programs that focus on Jewish textual literacy do not teach about the history, value system, or governing principles of Jewish communal leadership. Although leaders and organizations can benefit from this kind of Jewish literacy training, it is important to remember that "Jewish literacy is not the same as Jewish leadership" (Lewis, 2004, p. 156).

Some board development programs do veer away from the Jewish literacy trend and try to teach a specific skill or competency. However, they often do not teach the skills that board members need. Often they focus on organizational skills, such as budgeting, marketing, fundraising, and how to run an effective meeting, which are different from leadership skills. While both are important, just teaching the former diminishes the role of what a leader actually should be doing (ibid., p. 157). Board training programs should teach "coping with change; visioning and setting direction; aligning, motivating and inspiring people, fostering teamwork; challenging others to maximize their potential; mentoring; and risk-taking" (Lewis, 2004, p. 156).

It takes time and patience to identify and nourish talent in lay leaders (Galperin, 2012, p.2). Unfortunately, time and patience are often resources that organizations do not have or are not willing to invest in. Some organizations feel as though they have not obtained the return on investment they expected from training programs they have run in the past (Bubis, 2007a, p. 173), and therefore have stopped putting the effort into creating such programs. However, it is

important to identify what is missing from current board development programs and keep working to make them better.

Learning how to be a board member and an effective leader does not occur over night. While leadership skills are essential to teach, new board members must also be trained in the specifics of the organization. This can all occur through effective board development and education. “Board development, the vehicle of choice for facilitating engagement and education of boards and their board members, is an organic, evolving, and proactive process solidly rooted in learning” (Zachary, 2006, para. 2). Participation in a dynamic leadership program can help transition a person from the role of volunteer into the role of leader (Donshik, 2009a, para. 1).

Board development programs are most successful when they encompass several things. First, they need to explain to Board members exactly what it means to be a board member and to occupy such a serious leadership role in an organization. Board members must be made aware of what the time commitment will be—both in meetings and outside research and literature they will need to read (Sharon Manson, quoted in Blumsack & Gordon, 2006, p. 34). Board members must understand what their specific roles are and why their position on the board exists (Linnell, Radosevich, & Spack, 2002, p. 49). Gerald Bubis, an active Jewish communal professional and volunteer in Los Angeles, suggests creating an orientation checklist for new board members so they will better understand their roles and responsibilities (Bubis, 2007b, p. 216). Other organizations have sought to ensure that board members understand their roles by having them sign a board “contract” as part of their board development training.

Board development trainings also need to teach lay leaders how to be effective in their roles. This includes training board members not just on the importance of asking questions, but also how to ask the right questions. Board members should ask questions with respect and in

order to make sure they are fully informed of the situation, not just to show that they are knowledgeable or smart (Blumsack & Gordon, 2006, p. 36). Board members also need to be able to explain their rationale when voting on an issue (Blumsack & Gordon, 2006, p. 36). They should be able to articulate their reasoning behind decisions, more than just a “gut feeling.”

Additionally board members must realize that “it’s the board majority—not the individual board member—that makes decisions.” (Blumsack & Gordon, 2006, p. 34). Board development programs must stress that being part of a board is about being part of a team and all board members must work together for the good of the organization.

One way of showing board members the importance of partnerships is through mentoring, which is “one of the most powerful means for facilitating board development and learning” (Zachary, 2006, para. 3). By assigning a staff member or more senior board member to help mentor a new board member, it shows both long-standing and newer board members that “they are an integral part of the learning organization” (ibid., para. 4).

Board development programs also must focus on the “big picture,” as well as these little details (Beck, 1999, p. 222). Leaders must be educated about the “numbers” of an organization, including how many people are helped, how much has been raised, and what the donor base looks like (Galperin, 2012, p. 97). Additionally, board members need to know the stories behind these numbers, so they can effectively talk about their organization’s cause. These leaders must also be taught to review what has been done in the past - to see what went wrong or right, who contributed to it, and how it can be changed to be more effective in the future (Galperin, 2012, p. 54).

Effective board development programs also help move board members beyond being “rubber stamps” for professionals, and allow the board members to realize their value and utilize

their skills. Effective development shows board members how to use the skills they possess, which were the catalyst for their being asked to join the board in the first instance, to become more effective leaders (Beck, 1999, p. 217; Donshik, 2009a, para. 5). Effective training also teaches the board members that while one set of skills may have boosted them to the top of their professional lives, those same skills will not necessarily work in the non-profit world. The training must give “an understanding that communal leadership is vastly different from running one’s business or foundation” (Wexler & Solomon, 2000, p. 12).

It is also important for board development programs in the Jewish non-profit world to remember the “Jewish” part of their mission. “At a minimum, programs purporting to be Jewish leadership development should teach about Jewish leadership. They should include material about the history of Jewish communal leadership, its major paradigms, and key personalities, as well as classical Jewish principles of effective and authentic leadership” (Lewis, 2004, p. 158). Jewish organizations often stress their Jewish values in their mission statements, and these same values and history should not be forgotten while training their leaders.

Hal Lewis, current president and CEO of Spertus Institute, nicely sums it all up by observing that leadership programs need the following: a clear articulation of who the program is geared towards; to occur over a period of time as skills take time to acquire; to offer hands-on experiences and not just theoretical information; to mentor and coach experiences; to offer opportunities for people to reflect on their personal leadership styles and skills, as well as opportunities for the participants to give and receive feedback and observations of the leadership program and how they are progressing in it (Lewis, 2004, p. 158). When leadership programs include all of this, as well as their Jewish values, then our boards and the organizations they serve can both be their most effective. A school board member notes, “I have made it a point to

go to as many workshops as I can... He [her mentor] was right; I am a better board member because of my training” (Blumsack & Gordon, 2006, p. 35).

This capstone project focuses on the Jewish Federation of Greater Los Angeles (henceforth referred to as the LA Jewish Federation) as a case study of how board members are being prepared for their roles as community leaders and what leadership development opportunities are available to them.

### **Methodology**

To answer my research questions, I conducted six one-on-one interviews with LA Jewish Federation board members and professionals. Five interviews were with board members who held varying levels of leadership on the board, including general board members, executive board members, kitchen cabinet board members, and at-large board members. As well as varying in participation levels on the board, those interviewed also had served on the board for varying amounts of time (from 4 years to 15+ years) and included both men and women. The sixth interview was with a professional staff member of the Jewish Federation who worked closely with the board.

Interviewees were found through staff and other board member recommendations of people who might be willing to participate in my study. Every board member who was recommended for an interview was asked to participate; out of eight board members who were recommended, five responded positively to the invitation and participated in the study.

The interviews were held throughout the fall of 2013. Interviews took place wherever the interviewee requested, most often in the interviewee’s office, but occasionally in coffee shops. All interviewees were assured of their confidentiality before the interview, in hopes of getting

the most honest and direct responses for the interviewees. All interviews were audio recorded to ensure no one was misquoted or misrepresented.

One-on-one interviews were the chosen methodology because they allowed me to obtain in-depth information about the training and leadership development of board members, as well as understanding people's personal feelings about what is (and is not) currently in place. Interviews have the advantage over focus groups of allowing people to be more open about their experiences and how they feel their experiences are aligning with what they felt those experiences should be.

In addition to these interviews, in order to inform my recommendations for the LA Jewish Federation, I contacted Federations around the country for information on current board development programs. Federations first contacted included those that I had personal relationships with and those that had already volunteered information about their leadership programs for a survey that Jewish Federations of North America did in conjunction with the Jewish Federation of Greater San Diego. Additional federations were contacted based on recommendations of those Federations I first contacted. I spoke with a total of eight Federations about their current Board training and development practices.

### **Background on The Jewish Federation of Greater Los Angeles Board**

The LA Jewish Federation is a 100-plus-year-old organization with the following mission:

Based on Jewish values, The Jewish Federation of Greater Los Angeles convenes and leads the community and leverages its resources to assure the continuity of the Jewish people, support a secure State of Israel, care for Jews in need here and

abroad, and mobilize on issues of concern to the local community, all with our local, national, and international partners (About the Jewish Federation).

The LA Jewish Federation, as with all 501(c) non-profits, is mandated by law to have a volunteer board of directors to oversee the governance of the organization. While the LA Jewish Federation began primarily as a volunteer-driven organization, it has transitioned to a professionally driven organization where the board is responsible for policy, oversight, and supervising the President and CEO of the organization (Federation professional, interview). Board members are expected to “attend board meetings; take on a project, committee chairmanship, or portfolio of some sort, and make a meaningful gift to the campaign” (Board member, interview). Non-mandated board responsibilities that came up in interviews included: have a relationship with donors, offer sound and reasonable advice and opinions, and do due diligence to ensure you are not just rubber-stamping others’ ideas.

All board members with a vote are considered general board members. There are 40-45 general board members at any given time. Approximately 20 of the general board members are also executive board members—these are board members who hold certain portfolios including president and vice-president of the board, campaign chair, women’s chair and women’s campaign chair, and chairs of the three Federation initiatives: Ensuring the Jewish Future, Engaging the Community, and Caring for Jews in Need. Of the executive board members, five of them including the board chair and campaign chair are considered “kitchen cabinet” members. The kitchen cabinet board members meet the most often (every other week compared to bi-monthly for executive board members and four times a year for general board members), and the decision-making process often begins with this group. At-large board members are members of the community who sit on the board but do not have a vote.



Board members are chosen because of their commitment (both emotional and financial) to the organization and ability to understand the issues at hand. Additionally, they have the respect of their peers and represent the diverse constituencies that make up the Los Angeles Jewish population—including age ranges, religious communities and ethnicities. Board members accept the invitation to serve on the board for a variety of reasons, including the honor of being asked, the chance to give back to the community in a different way and to make the changes they see needed, the opportunity to use their business and leadership skills in a way that would be beneficial to the board, and the ability to voice opinion on their personal interests, including Israel.

Recently, the Federation board underwent a major structural change, reducing the number of board members from over 100 members down to 40-50. This change was made because the previous size of the board made it too big for decisions to be made, or changes to be implemented (Federation professional, interview). While some interviewees expressed happiness with the current size of the board, at least one board member noted they felt that the size was still too large, and the board would be more effective with even fewer sitting board members.

Those who expressed happiness with the current size of the board reflected that it worked because many of the decisions were made by smaller groups of board members, specifically the kitchen cabinet and the executive board, which then passed on recommendations to the general board for a vote. However, some saw this chain of command as counterproductive, with one board member reflecting:

The board has increasingly become a kind of rubber stamp to the work of the executive committee. The power has shifted from the board over time to a smaller

executive committee, so the nature of decision-making doesn't leave the board members with a lot of authority.

### **Board Training at the LA Jewish Federation**

The LA Jewish Federation does not currently offer any formal initial training or orientation for board members. One board member reflected:

There is no formalized structure for board training. Most of the people on the board will have led in one place or another, so they know what it means to lead.

But there's not real consistent background in terms of how informed they are about the Federation, the Federation's visions and missions, its goals and developing their tools to become more effective leaders.

One board member suggested that there should be a single page document for all board members outlining their responsibilities and duties for the year (sometimes called a board contract). Other board members worried that such a document would turn off board members, especially if it was referred to as a board "contract." The Federation professional noted that the staff at Federation is currently in discussion with key lay leaders about the creation of such a document, but also warned that "it's a helpful tool, but my experience with board contracts is: boards that have them work just as effectively or ineffectively as boards that don't."

When people join the board, it is often assumed that each board member is already familiar with everyone else on the board. One board member suggested that during initial orientations the Federation staff and long-standing board members should do a "better job of not only introducing new board members, but making sure that there's a more methodical approach to integrating new board members to the existing board, and making sure people know each other."

According to the Federation professionals, at the beginning of every year there is a board retreat (although several board members couldn't remember these ever actually occurring). For those who did remember attending such retreats, there was no consensus on what the goals of these board retreats were. One board member saw the retreat as group bonding time and remarked that the retreat was more in order to "sort of spend quality time with each other than actually do more work as a board." Another board member commented that there were often broad goals of using the retreat to improve leadership skills, but that those goals were often not explicitly addressed to the board members or met.

While there are not any initial trainings or orientation for board members, there are some ongoing resources available for board members. One such resource is the General Assembly, the Jewish Federations of North America's annual conference, which LA Jewish Federation board members are encouraged to attend. This conference focuses on different leadership techniques and suggestions for issues facing today's Jewish community and is open to all Jews around the world. A board member noted that board members who are major donors also have access to certain missions that may touch on leadership and board development; however these missions are available to all major donors and not geared specifically for board members.

A board member noted that several years ago the Federation professionals did bring in an outside consultant to come and figure out what "we wanted in the board, and then everybody voted on having continued [ongoing Jewish] education sessions." However, many people did not come to the follow-up sessions that came out of this consultation, which the board member reflected, "means they did try, but the board's obviously not interested in that."

Another board member noted that the training and information sessions for board members are knowledge-based: "We have lots of opportunities to hear people speak, to be

brought up to date on Israel politics and are invited to so many opportunities to see what we do and where it goes, but nothing on leadership development.”

One board member noted that while it is the responsibility of the board and the Federation professionals to make sure that board members are oriented and have the skills they need, the board members also need to make sure they are seeking out information in areas where they do not feel competent. She felt people need to understand they are accountable and a board member should take ownership of being on the board, which some currently do not.

While discussing what training and resources should be available for board members, a range of opinions emerged over whether board members even need leadership training. Many board members felt that by the time people became board members, they should already be trained as leaders. One board member stated that the LA Jewish Federation tends to invite people on its board who are already “very evolved leaders in their own right, almost without exception. Whether it’s natural, or trained, or a combination of both... But we have a very mature, pretty impressive group of people on the board.”

Another board member added that if someone is on the board, he or she is expected to already have the leadership training, and “leadership development tends to happen as a beginning volunteer and lay leader.” He continued, saying that the board, “isn’t a place for leadership development; it’s a place to recognize that you’re a leader. And I think those are two very different entry points. I think people don’t want people on the board who aren’t substantial. And I don’t mean that financially. I mean substantial as leaders.” The Federation professional agreed with these board members’ sentiments, noting that “Federation has many leadership opportunities, and most of the people, if not all of the people, coming on the board are people who have been on a leadership ladder, either here or other places.”

One board members also noted that Los Angeles is very different in who it attracts to its board compared to other Federations, which plays a role in why leadership development is not needed for its board members. She remarked, “People want to be on the board [in LA], and it’s very selective. And that’s different I think for a small city. I do. I mean, I grew up in the Midwest, and we were desperate for leaders, and they were desperate for leadership training.”

While not everyone believes that ongoing training and leadership development is necessary for all board members, one LA board member summed up the necessity of lifelong learning:

I think anybody, even the President of the United States, we all need refresher courses... we could all do with seeing another way, and another opinion, and then finding out a new way of doing things or a different way or slightly changing it. There’s so much we can learn, from being there. I mean when you get back to that it’s... it’s Jewish education. If you study ethics, Torah, anything like that, you learn something. If you never do that, I’m not saying you stay stupid, but you’re not broadening your horizons... We can always do better, as a parent, as a spouse, as a friend. You can learn from everything in life. We’re not perfect. We should always say we can do better and we can go from great to greater to greatest. But we can’t do that if we don’t try, and learn a little bit. And wrestle with some of the things that we do.

When discussing their preparation for becoming board members, several interviewees noted that they had participated in other leadership programs, including the Wexner Heritage Program and the National Young Leadership Cabinet. The Wexner Heritage Program focuses on “Jewish learning and leadership development for volunteer leaders in North America” (Wexner

Foundation). National Young Leadership Cabinet is a leadership and philanthropic program of the Jewish Federations of North America. “Through annual retreats and conferences, the cabinet develops and cultivates leadership skills and educates members about Israel advocacy, humanitarian endeavors, legislative issues and Jewish life” (Jewish Federations of North America). The two National Young Leadership Cabinet members shared that their experience gave them certain skills and knowledge about the Federation world. The three Wexner graduates all shared the same experience: they learned a lot about Jewish text and literacy, but it was not a leadership program. One board member summed it up saying, “[Wexner] gave me some underpinnings of Judaic substance and just energized me as a leader...I don’t think we were explicitly given leadership development tools, but there was definitely an explicit understanding that you would take this, and become a leader if you weren’t already in our community.”

Board members had previously stated that there was no need for leadership training for them because it was done through other Federation programs or outside programs. However, one board member noted that he had never participated in any leadership program. Another board member reflected that while there are some leadership programs at the Federation, such as the New Leaders Project and the Young Leadership Development Institute, most board members did not participate in them because those programs did not exist at the time when they were moving up in the ranks of the Federation system.

This discussion raises the question: how important is previous leadership training? Are leadership skills something that someone can just learn on the job? Board members reflected that, through hands-on experiences of being a board member, they learned several skills including: to speak up more, reflect and work with donors, and – in one case – not be afraid of being perceived as an “uppity woman.” Even so, research cited above shows that those

experiences could be further strengthened with formal board training and leadership development programs, so lay leaders do not feel intimidated when they first sit on a board and feel it is okay to speak up right away. Although the interview sample was small, overall, board members who had previously participated in several leadership programs, including those outside the Jewish arena, and worked on continuing to educate themselves about Federation's work and their responsibilities as board members felt proud of their time on the board and believed they were making a difference in the community. Board members with less formal training felt as though they were rubber stamps on the board, and their job was merely to say yes to what was being presented to them. This may possibly be attributed to their lack of comfort in such a setting, which orientation programs and ongoing leadership programs could help rectify.

### **Board Training at Other Jewish Federations**

The LA Jewish Federation is not alone in having no formal training and leadership development opportunities for board members. A majority of Federations contacted noted that they were not preparing their board members well enough, and their boards were not functioning as effectively as they could be. Federations around the country are discussing how to prepare their boards and are responding by creating board guidelines and contracts, planning leadership seminars, and starting conversations between the professionals and board members on how to move forward. However, most of the Federations contacts were just at the very beginning of these discussions and did not yet have anything in place. Several Federations around the country are in the process of creating task forces to discuss how they can improve their leadership training and board development.

One recommended source for beginning these conversations is having everyone read Misha Galperin's book, *Reimagining Leadership for Jewish Organizations*, which is how the

Jewish Federation of the Greater East Bay is beginning their discussions on board training and leadership. The book discusses 10 life lessons learned by a Federation executive and serves as a starting point for Federation professionals and lay leaders to discuss what is working for their board and organization and what needs to be changed. The book stresses the importance of partnerships between the board and professionals.

In Portland, the CEO has begun to meet with all board members one-on-one to better prepare them. This Federation also created a board guidelines document (see Appendix A). These guidelines let board members know what is expected of them and what their role is within the organization. With these new implementations, the CEO feels as though this Federation is moving in the right direction in preparing its board members.

The Boston Jewish Federation does not have a board-specific training program. However, The Combined Jewish Philanthropies (Boston's Federation) does have the highly revered Acharai program, which prepares its lay leaders to take on leadership roles in the Boston Jewish community. This two-year program includes monthly meetings to discuss leadership, Jewish identity, Jewish values, and the mission, vision, and values of CJP, as well as a 10-day mission to Israel and Poland. While people who graduate from this program are not automatically invited to serve on boards, the professionals at CJP feel that its graduates are well prepared to take on leadership roles in the Jewish community. Part of the success of the program can be attributed to its thought-out and clearly defined goals for each session and the program overall, as well as its connection to Jewish texts about leadership (specifically sayings from Pirkei Avot).

## **Conclusion and Recommendations**

Research has shown that the current trend in leadership training is programs geared towards young adults so that they can take over the reins from today's leaders in the future.



However, while this is a great asset for future years of leadership, it is important to make sure that those who are currently running organizations have a common language and values, and are able to fully function in their role as a board member.

*Recommendations for the LA Jewish Federation*

The LA Jewish Federation would benefit greatly from having either a board contract or guidelines, as well as an orientation meeting for new (and possibly returning) board members. This would allow Federation professionals and board members to make sure they are on the same page of what everyone is looking for in a board and what commitments the professionals and board members have to each other.

The LA Jewish Federation board would be served well by creating opportunities for board members to get to meet one another during initial orientations. This would create a more cohesive community among the board and could lead to better dialogue between board members since they would be more comfortable with one another.

The Federation may also benefit from instituting a mentoring program, where professionals and more experienced board members mentor newer board members. One board member noted that people would likely be excited about the idea of mentoring. Another board member noted that mentoring programs have proven very successful on other boards they have served on, as they allow people to work on the skills and gain education in the specific areas they feel are their weaknesses. This mentoring program could be very successful if the mentors were established members of the executive committee mentoring newer members of the general board. As well as helping the newer board member navigate their role and understand the Federation board process, it would also help close the gap mentioned in some of the interviews between executive board members and general board members. The mentor could give the general board

member more insight into the executive board process and help the mentee not feel as though they are just a rubber stamp in the decision making process.

All of these recommendations could be part of a larger leadership training program geared specifically toward board members and soon-to-be-entering board members. Having such a program would help the board members better communicate with one another through having a shared leadership language. In addition, they would be more likely to trust one another's leadership skills since they would all have gone through the program together. Finally, this kind of program would help board members bond with one another and create an active board community.

#### *Recommendations for Federations and other Jewish Organizations*

The recommendations listed above for the LA Federation could be applied broadly to any Federation or Jewish non-profit organization. For Federations that currently have leadership development programs or are in the process of creating such programs it is important for them to define what they mean by leadership program. Is it a Jewish text class, a Jewish values class, or is it teaching leadership skills and styles? For programs to be successful they must have clearly defined goals and objectives, and each session must be organized with these goals in mind. Additionally, these leadership programs must have a clearly defined audience. Currently the trend of having leadership programs open to everyone is not successful, as organizations have different goals and needs for different types of lay leaders, volunteers, and board members. Defining who the intended audience is will help a program clearly determine and meet its goals.

Federation professionals should also work with board members to assess their strengths and weaknesses as they come onto the board. This will help board members understand what skills they have already excelled at and where they need to grow as a leader. Awareness of

strengths and weaknesses can make a board member a much more effective leader. This must be done in a delicate and thoughtful way, as the professionals do not want to alienate board members by telling them what they do not do well.

For organizations that want to work towards the goal of having a cohesive board, a mission and/or weekend-long retreat is recommended. Research on experiential education has shown that learning can be heightened when participants are isolated from everyday life in a retreat, trip, or camp setting, and the content and social and cultural environments can be controlled (Heim, 2010). This isolation allows people to break free from the molds they may often find themselves adhering to and allow them to create deeper bonds with fellow participants.

Whatever programs and processes organizations choose to implement in the future, they should work on making sure that board members enter with an open mind and remember that lifelong learning is a Jewish value and works to make the entire community a better place. A board member summed up the importance of a positive attitude and always trying to learn more, saying, “I’m always hungry to learn something, so if I’m available and I can go, I go. Because I believe that wherever you go, you can find something [new to learn].” Through the creation and implementation of thoughtful and goal-oriented board leadership and training programs, an organization strengthens not just the board, but the organization as a whole.

## Works Cited

Beck, P. (1999). Lay leadership in Jewish education: Recruitment, retention and development.

*Journal of Jewish Communal Service* , 75 (4), 210-223.

Blumsack, K., & Gordon, B. B. (2006). Board member boot camp. *American School Board*

*Journal*, 193 (8), 32-38.

Bubis, G. B. (2007). Scenarios from real life. In G. B. Bubis, *The Director had a heart attack*

*and the President resigned* (Revised Edition ed., pp. 165-196). New York: iUniverse, Inc.

Bubis, G. B. (2007). Tools and exercises. In G. B. Bubis, *The Director had a heart attack and*

*the president resigned* (Revised Edition ed., pp. 196-267). New York: iUniverse, Inc.

Chait, R. P., & Taylor, B. E. (2007). Charting the territory of non-profit boards. In G. B. Bubis,

*The Director had a heart attack and the President resigned* (Revised Edition ed., pp. 99-

111). New York: iUniverse, Inc.

Collins, J. (2011) *Good to great*. New York: HarperCollins Publishers, Inc.

Donshik, S. G. (2009a, February 11). Dynamic leadership development programs. *eJewish*

*Philanthropy*. Retrieved June 29, 2013: <http://ejewishphilanthropy.com/dynamic-leadership-development-programs/>.

Donshik, S. G. (2009b, January 21). Strengthening the board strengthens the non-profit. *eJewish*

*Philanthropy*. Retrieved June 29, 2013: <http://ejewishphilanthropy.com/strengthening-the-board-strengthens-the-non-profit/>.

Galperin, M. (2012). *Reimagining leadership in Jewish organizations*. Woodstock, Vermont:

Jewish Lights Publisher.

Heim, George (2010). An introduction to Constructivist Learning Theory. Formidlings Seminar.

Video recording. Retrieved from <http://vimeo.com/10259346>.

- Jewish Federations of North America. (2013). National Young Leadership Cabinet. Retrieved from [www.jewishfederations.org/cabinet.aspx](http://www.jewishfederations.org/cabinet.aspx).
- Lewis, H. M. (2004). Making leaders: How the American Jewish community prepares its lay leaders. *Journal of Jewish Communal Service* , 80 (2-3), 151-159.
- Linnell, D., Radosevich, Z., & Spack, J. (2002). *Executive Directors guide: The guide for successful non-profit management*. Boston, MA: United Way of Massachusetts Bay.
- Radbourne, J. (1993). Recruitment and training of board members for the nineties and beyond. *Journal of Arts Management, Law & Society*, 23 (3), 211-224.
- Wexler, R. L., & Solomon, J. R. (2000). Setting standards for volunteer leadership and the profession. *Journal of Jewish Communal Service*, 76 (1), 4-16.
- Wexner Foundation. (2013). Wexner Heritage Program. Retrieved from <http://www.wexnerfoundation.org/programs/wexner-heritage-program>.
- Zachary, L. J. (2006, Summer). Mentoring your way to board development. *Coalition for the Advancement of Jewish Education*.  
<http://www.bjpa.org/Publications/details.cfm?PublicationID=1984>.

## **APPENDIX A:**

### **BOARD MEMBER ROLES AND RESPONSIBILITIES**

Jewish Federation of Greater Portland Board of Directors serves as the governing body responsible for creating and supporting our mission, vision and values.

#### **BASIC BOARD FUNCTIONS**

- Enable the Federation to advance its mission.
- Protect the public trust.
- Delegate the organization's management function to the CEO including planning, organizing, staffing, directing and controlling.
- Develop and approve strategic plans.
- Ensure adherence to the Jewish Federation of Greater Portland Bylaws.

#### **BOARD MEMBER ROLES AND RESPONSIBILITIES**

The Board, through guidance, commitment and determination, ensures that the Jewish Federation of Greater Portland maintains a standard of excellence. The Board:

- Provides adequate planning and assists with implementation and monitoring.
- Monitors and strengthens programs and services.
- Ensures adequate financial resources to meet its mission.
- Makes a meaningful contribution to the Annual Campaign.
- Protects assets and provides proper financial oversight.
- Approves annual budget.
- Ensures proper financial controls.
- Builds and maintains a competent Board.
- Ensures the legal and ethical integrity of the Jewish Federation of Greater Portland.
- Serves as an advocate for the Jewish Federation of Greater Portland and its mission.
- Ensures excellent management of the Jewish Federation of Greater Portland.
- Remains diligent in their attendance of meetings and activities.
- Provides for succession planning and leadership development.

## HOW THE BOARD ACHIEVES EXCELLENCE

In order for a Board to be effective, they must embrace the following three criteria:

- **PARTNERSHIP:** High performing Boards work in a clearly defined relationship with top professional leadership. They work with a clear understanding of who does what, and by recognizing that the overall performance of the Board and the organization is deeply connected to the interdependence of the Board and the top professional. This relationship must be built and cultivated through deep respect, trust and open/honest communication.
- **PARTICIPATION:** In addition to meeting attendance, Board members are expected to take an active role in various activities involving the Jewish community. They should also serve as advocates for the Federation and support the Annual Campaign efforts as contributors and solicitors.
- **KNOWLEDGE OF OPERATIONS:** It is the role of the Federation Board to govern and of the Federation professional team to manage. The Board provides counsel to the professionals who are responsible for operations and day-to-day management. It is the duty of the professionals to provide pertinent information regarding operations to the Board members ensuring that decisions are based on comprehensive information and expertise.

**“THIRTEEN PRINCIPLES FOR BOARD MEMBERS”**  
**from “Boardroom Verities” by Jerold Panas**

As a trustee, there are thirteen criteria you can use to help measure your performance. You could add other items, but they will not rate any higher than these. The following are not listed in any order of priority.

1. You work at understanding your institution, its history, and its present program and outreach. You understand its mission and you measure everything the institution does in relation to its philosophy of operation.
2. You are faithful about attending board and committee meetings and you participate fully, openly, and with candor.
3. You come carefully prepared for all board and committee meetings. This is especially true if you are asked to make decisions that have a high impact on the future of the organization and those it serves. You should not vote without proper understanding and preparation.
4. You are a roaring advocate! At every opportunity possible, you speak with enthusiasm and a certain ardor about the organization.
5. You bring to bear all of the influence possible to persuade others to act on behalf of the institution.
6. You settle for nothing less than the best. You make certain that all activities and offerings are of the highest quality possible. It is indeed a very strange phenomenon of trusteeship - when you refuse to accept anything but the very best, you most often get it.
7. You bring your business acumen into the board room. You make certain that your comments and your vote expresses good, sound judgment. You don't play "follow the leader" (unless, of course, you are the leader!). You decide what is the very best for the cause, and you fight for it. After the vote is taken, you act as an adult. If you simply can't tolerate the action that was taken and it becomes a matter you find near-impossible to deal with, you give serious consideration to leaving the board.
8. You develop a good understanding of the institutions that are in competition with yours, or are serving constituencies in the same way. You become acquainted with the marketing concept and you even become acquainted with such strange sounding word combinations as Product, Price, and Place.
9. You volunteer! There are assignments that come up, some that are difficult and fairly time-consuming - and you offer to take them on. At first, you may shock fellow trustees with your willingness. But after a short while, that kind of spirit catches on. It is contagious.



**10.** You give sacrificially. That means, you give to the very best of your ability. No one can or will ever tell you how much to give. But it is certainly expected that you do as much as you can because you are a trustee. And, you help get gifts from others - friends, business associates, and neighbors. At first, they may be tempted to duck you, but your enthusiasm will be so infectious they will find the cause irresistible.

**11.** You channel your ongoing skills into the work of the board. If you have an accounting background, you may wish to serve on the Finance Committee. Advertising folks would have a bent toward Public Relations.

**12.** You provide accord and acclaim for the good performance of staff. You have a right to expect the very best performance possible from your staff and chief executive officer. The truth is, however, that not every organization has a staff that comes up to this high expectation. When yours does, let them know it. You'll be amazed at what wondrous things this can achieve.

**13.** To rate really high marks as a trustee, it may not be possible for you to serve on more than a few boards at one time. For some men and women, they cannot serve on more than one and still perform to the highest capacity. Ration your time and energy to those boards where you can give the most to the organizations you love the most. The payoff will be tremendous.