Sulam for Current Leaders
Session 5
The Volunteer Staff Partnership Plan

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"Which is the proper course that a man should choose for himself? That which is an honor to him and elicits honor from his fellow men." (*Pirke Avot*/Ethics of our Fathers 2:1)

Management consultants always begin by examining the behavior of top leaders. This focus is warranted because the community will often look to its leaders for guidance, direction and even inspiration. If leaders make collaborative partnership a priority, others will be more likely to follow their lead.

In congregations, the key collaborative partnership is between the board and the rabbi. In addition to being charged with the responsibility of providing strategic and spiritual direction and guidance to staff, rabbis are shaped by their board employers and simultaneously called to shape the lives of board leaders. It is worth noting that many kehillot have executive directors, education directors or other professionals also play a pivotal role in creating and implementing administrative plans. Partnership applies to those professionals, as well, although this article is more strategically related to the roles of the president and rabbi.

Additionally, the words "lay leaders" and "volunteers" are used relatively interchangeably. All lay leaders are unpaid volunteers. The term lay leader can suggest that the volunteer is functioning as a non-ordained clergy person from the larger community involved in spiritual work. For the purposes of this article, "lay leadership" will refer to the sacred partnership with staff. "Volunteers" refer to unpaid leaders who support and implement various projects.

Since partnerships matter, collaboration and teamwork constitute primary competencies for thriving congregations.

The Partnership Path

There are many expectations for a rabbi. It has been said that rabbinic search committees want a rabbi with the gravitas that comes with age and experience, but also someone who can also get down on the carpet of the social hall and connect with young pre-school children; someone who can bring a powerful presence one-on-one, and also is a public spokesperson in the broader community. One who can write a rabbinic job description that lists such tasks as adult educator, teacher, *tefilla* (prayer) facilitator, staff supervisor or program developer. A rabbi's job is more than just a set of tasks. It also encompasses a set of roles.

A United Synagogue guide for search committees outlines the many roles that rabbis play (http://www.uscj.org/images/rabbinic_skill_priority_guide.pdf), including pastor, teacher, spiritual leader, fundraiser or community representative. The guide is designed to clarify which roles are essential priorities for a community and which ones would be considered beneficial extras when looking for rabbinic candidates. This document underscores that a rabbi's performance cannot be assessed in a vacuum. It is shaped by the environment of the congregation and the lay leadership's expectations. When lay leaders make long lists of what they want in a clergy person they sometimes fail to ask which roles also belong to them. What role should volunteers and lay leaders have in visiting the sick, teaching fellow members, speaking out for causes, and leading services?

What does the role of clergy as "thought leader" look like? Alban consultant Dan Hotchkiss, a Protestant minister, has noted that his sermon preparation requires "hours of hunt and peck, preceded by as many hours of what might appear, to the naïve observer, to be procrastination. And yet, that lazy-looking process—which seems to take…a full day or two to carry through—is one of the main things as clergy we're paid for." Clearly much of this work is not seen by lay leaders.

The vast majority of a rabbi's work is out of view most of the time. For example, many rabbis have the responsibility of providing pastoral care, visiting the sick and tending to their families as they care for their loved ones. Members might only see the rabbi at the end of the process, at a funeral or leading a *shiva minyan*.

One rabbi tried to explain what happens when congregants come into tell him that they have cancer or are getting divorced. He said, "My whole sense of the person changes in that moment. My day is turned upside down." The rabbi's schedule, while somewhat invisible, may be booked and his or her emotional plate may be full, yet they need to provide pastoral care as needed.

A Gallup Study of Management found that people want to have a clear understanding of what is expected, a chance to do what they do best and the support to do their best work. They want their managers to be aware of their efforts. The rabbi wants no less.

Volunteers and professionals can journey on the same path if they focus on the following:

- Shared assumptions about authority and leadership

- Shared values based on a covenantal relationship
- Operating agreements on job descriptions and reporting relationships
- Mutually developed goals
- Ongoing mutual review based on responsibility and accountability

By embracing these vital areas, partners can build a foundation of trust, transparency and communication that will benefit themselves and their congregation.

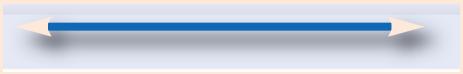
I. Shared Assumptions about Authority and Leadership

In the Conservative movement the rabbi is seen as *"marah d'atra"* (the leader of the place). This role honors the rabbi's authority in ritual practices of the synagogue service, *kashrut* (keeping kosher), holiday observance, pulpit freedom over sermons etc. Rabbis may have freedom of the pulpit, but they will be judged by their lay partners with what they do with that freedom. They may be the head of staff, but they will be assessed over how much teamwork they foster and the outcomes of their staff's collected efforts. They may be the lead voice on ritual matters in their house of worship, but in matters of governance they have to be aware of the board's house rules.

In order to pave a pathway of partnership, it is essential that kehilla leaders manage the tension between rabbinic and lay leadership. The chart on the next page, based on the work of Roy Oswald and Barry Johnson (Polarity Management - Alban 2010), lists two poles of authority and leadership: rabbinic leadership and lay leadership. There are also four quadrants. Quadrants 1 and 2 represent strong and developing leadership, while quadrants 3 and 4 represent weak and undeveloped leadership.

The goal is to move into quadrants 1 and 2 to help create thriving partnerships.

THRIVING PARTNERSHIPS

Rabbinic Leadership  **Lay Leadership**

QUADRANT 1:
STRONG RABBINIC

Rabbis shape vision but invite visioning partners.

Rabbis have theological depth to bring the wisdom of the tradition to life.

Rabbis have emotional intelligence to build partnerships.

Rabbis are proactive in setting goals and asking for review.

Rabbis provide pastoral care to staff and leadership to strengthen teamwork.

QUADRANT 2:
STRONG LAY

Lay leaders and rabbis help shape vision and strategy, goals and policy.

Lay leaders understand the complexity of their environment, the nuances of the role of the rabbi, and the volunteer staff structure.

Gifted and inspired leaders can step up and help the rabbi pastor to the sick and bereaved. They can help teach and lead other in social action. They can help make the congregation welcoming.

QUADRANT 3:
UNDEVELOPED RABBINIC

Rabbis make lay leaders feel inferior.

Rabbis don't let lay leaders have a chance to succeed or fail.

Rabbis mirco-manage their staff.

Rabbis feel they have to do it all — over function.

Poorly defined organizational structure.

Unclear reporting relationships.

Authority, energy and confidence of clergy declines.

Rabbis become reluctant to lead or take ownership. They avoid their own assessment.

QUADRANT 4:
UNDEVELOPED LAY

Strong lay leaders are in conflict with strong rabbis; one tries to win.

Lay leaders are afraid to give the rabbi input or feedback; resentment may build.

Lay leaders may get involved in giving direction to staff in program management committees.

Lay leadership does not develop.

Lay leaders don't step up to raise funds.

Poorly defined organizational structure.

Unclear reporting relationships.

DECLINING

A rabbi who comes to a culture that has expectations for very strong rabbinic leadership might face resistance as he or she tries to encourage lay leaders to step up (lead more services, teach classes, visit the sick, be greeters at *Kiddush*, etc.). In contrast, a rabbi who comes to a culture with a very strong sense of lay volunteer authority might face resistance if he or she announces any major initiative, such as a congregational trip to Israel, without board buy-in and support.

Clergy can use their strong rabbinic leadership (Quadrant 1) through sermons, teaching, and direct communication with key people to raise challenging issues. Lay leaders should be empowered to give feedback to the rabbi. When lay leaders are operating in quadrant 4, however, they may be providing so much direction that their rabbi may lose his or her authority to lead. The goal of the partnership path is to help both lay leaders and rabbis contribute their leadership.

Three Approaches to Rabbinic Leadership

In synagogues rabbis may choose to see their roles in different ways, their behavior and their choices will affect those of other professionals and volunteers. Let's look at three models that provide a continuum ranging from authority that is highly concentrated with the rabbi, to dispersed authority, where much of the authority and accountability is shared by and depends on others.

Chief Executive Officer (CEO) Model

In the CEO model the rabbi is the chief of staff who manages and guides the kehilla like a non-profit organization. In this model the board can focus on vision, strategy, policy and financial resource development, as they delegate program development, management and implementation to the rabbi. The rabbi takes full responsibility to ensure that the staff system is working.

One version of this model is the CEO-oriented rabbi who assumes overall responsibility for setting a course of the congregation while empowering the executive director to manage operations. In her book, *Inside the Large Congregation,* Susan Beaumont argues that the role of the clergy in larger congregations is to cast the vision and be the face of the congregation. She also encourages clergy to pastor to their staff and lay leadership. The CEO rabbi shares pastoral care with the cantor, clergy, staff and other rabbis and to community caregivers. CEO rabbis are able to coordinate programs by aligning the efforts of lay and staff leaders.

Chief Religious Officer (CRO) Model

The most typical model in medium to large congregations is the Chief

Religious Officer model, in which there is a dual reporting process. The rabbi serves as the program management staff leader, and may supervise or guide the work of the cantor, educator, preschool director, or program director. The president and other lay leaders (treasurer, house chair, etc.) supervise the work of the executive director in the administrative arena. Most successful rabbis and executive directors realize that they are partners and that they are in a system where they need mutual respect and collaboration.

One of the weaknesses of the CRO approach, is that it is not uncommon for there to be a lack of coordination between program and administrative staff. To address this concern, effective staff meetings help the program visionaries and managers work together and be aligned with one another.

Chief Spiritual Leader (CSL) Model

In the Chief Spiritual Leader model the rabbi focuses primarily on teaching, preaching and pastoral care, and chooses not to supervise anyone. CSL rabbis will delegate administrative issues to the lay leadership and the executive director or administrator. In this scenario, volunteers are expected to supervise and assess other staff and provide oversight.

Effective synagogue staff teams have a leader who orchestrates success. The most common source of senior staff dysfunction in synagogues occurs when the senior rabbi has not agreed to lead the staff, but has been unable to effectively delegate this staff leadership role to someone else. The board needs to ensure that the task of staff supervision and leadership is assigned to someone so that the kehilla can effectively implement its vision.

Summary

We have provided these models to help rabbis and their lay partners think more clearly about their roles. Many rabbis have suggested that they feel they are in between CEO and CRO, or between CRO and CSL. These concepts are not exact, and leaders may find they are on a continuum between these three models. What is essential is that leaders have a shared understanding of how they approach their responsibilities. With clear expectations, the entire staff can have the best chance to maximize its potential.

II. Shared Values Based on Covenantal Relationship

Susan Beaumont contrasts **covenantal vs. contractual relationships** in her book *When Moses Meets Aaron.* In a business contract, the focus is utilitarian – leaders welcome the rabbi's specific skills to achieve the most congregational benefit (output) for the least cost. In a covenantal relationship the goal is a sacred relationship that can evolve over time. Rabbis understand the challenges of lay leadership's time and lay leaders understand the complexity of the rabbi's role. Both appreciate the sacredness of their mission to create a thriving synagogue and come to see how their roles are like puzzle pieces that can complete the other. As partners we hope that the presidents will look back at their two years with gratitude. They had the opportunity to have an intimate relationship with their rabbi.

III. Shared Agreements

In a contractual relationship the rabbi and other staff are employees, and the leaders work hard to track staff performance. By contrast, covenantal relationships promote the vital needs of volunteers and staff to work collaboratively, to communicate about successes and failures, to clarify the spheres where they will operate (operating agreements) and to develop ways to track their progress. These covenantal relations aspire for the relationship to grow.

In a covenantal relationship, partners work hard to define reporting relationships and assessment processes. They work hard to clarify the role of volunteers and staff on board committees and program committees. The board may delegate supervision to staff but it does not delegate the responsibility for healthy personnel policies and practices.

When someone does not meet expectations in a contractual situation, he or she may be terminated. The next steps involve severance and outplacement services. In a covenantal community when a staff person is terminated the staff person usually feels a sense of spiritual loss- they are cut off from both their job and their spiritual home. Their partners also share a sense of loss because they were hopeful of an ongoing relationship.

Covenantal leaders are also intentional about welcoming new staff. They want to ensure that clear expectations and reporting relationships before they ask someone to move to their community. Volunteer and staff supervisors need to hold staff accountable to meet reasonable expectations. Some leaders report about staff who simply cannot meet job expectations. Some of these leaders feel that it would be "un-Jewish" to let the employee go.

Leaders are well served to strive toward more covenantal relationships, but that does not mean that they should ignore contractual obligations. Beaumont counsels leaders to remember that staffs are first and foremost resources for your mission rather than recipients of your pastoral care.

IV. Mutual Accountability

The most successful staff teams typically have rabbis who strongly define job expectations and reporting relationships, engage in some operational supervision, (at least of the program staff), and who are active partners with the executive director when on staff. Delegating all staff supervision to the presidents and vice presidents, as in the CSL model, places a heavy burden on volunteer leaders. There may be years when volunteers have the skill and commitment to play this role, but over the years there is a risk that they will not be able to step up. Even rabbis who function as chief spiritual leaders need to join lay leaders in appropriate staff supervision meetings.

Leadership Teams

The board should strive to delegate day-to-day supervision of programs to staff, but they have the right to know that there is a staff supervision process and plan. One approach for better ensuring effective communications and supervision is the leadership team model where the president, the rabbi and executive director (when on staff) meet together regularly to plan. This supplements the traditional president's one-on-one meeting with the rabbi and executive director. This process integrates governance and management and ensures better collaboration, teamwork and accountability. The three leaders can help plan the agenda for board meetings and track goals for staff and the board.

Paving the Partnership Path

In *Governance and Ministry*, Dan Hotchkiss suggests a leadership framework where the board and its volunteer committees have its primary sphere called governance. They are responsible for creating a vision, strategies, and policies.The governance role requires skills in analysis, reflection and conceptual thinking. **Governance** takes a longer term view and patience. One of the great ways to focus on governance is to ensure that there is a board agenda item each month that focuses on where the board wants the kehilla to be in 3 years and defines desired outcomes. Governance is focused on the future, not on what is happening next week.

The staff has their responsibility to manage programs (plan, coordinate, execute) and handles daily responsibilities. They are involved in the means to achieve an outcome. Management is tactical and action oriented. It takes flexibility, customer sensitivity and energy. Similarly, program committees are designed to manage programs, services and events. Program committees do not as a rule need to be on the board's agenda. Responsibility can be delegated to staff or volunteers who are accountable for the program.

Leaders in synagogues wear many hats. When volunteers are on the board or chairing standing committees they need to focus first on their governance role. Alternatively, when volunteers are implementing programs and providing hands-on services their focus is programming and project management. In these managerial capacities volunteers need to understand that they may need to take direction from and work in coordination with staff, who are ultimately responsible for the program's execution. Staff, of course, need to be sensitive in how they work with volunteers and appreciative of volunteers' time and commitment to the congregation.

Many synagogue boards will succumb to micro-management. The first leadership challenge is to focus the board agenda on strategic governance sphere and take purely managerial issues off the board table as much as possible. When partners craft leadership plans with shared operational agreements, the occasional detour into minutia and micro-management will not hurt. They will be able to get back on track quickly.

Partners build foundations for the future. While there are utilitarian reasons to have good partnerships, in a congregation such partnerships can also strengthen the bonds of community. Leaders make the effort to greet each other with a smiling countenance and to seek out the positive. They also are committed to making time on a regular basis for important community building conversations. When the partnership is working, it makes mutual review and accountability more of a reality.

For More Information

A valuable guide to the process of mutual review and assessment of professionals developed jointly by United Synagogue and the Rabbinical Assembly can be found in the document, "Putting the Partnership Under the Microscope," http://www.uscj.org/Objects/Documents/PartnershipUnderMi-croscope.pdf