



THE JACOB RADER MARCUS CENTER OF THE  
**AMERICAN JEWISH ARCHIVES**

**MS-831: Jack, Joseph and Morton Mandel Foundation Records, 1980–2008.**

Series D: Adam Gamoran Papers. 1991–2008.

Subseries 5: General CIJE Files, 1991–2008.

---

Box  
68

Folder  
16

Lay Leadership. Beck, Pearl. "Lay Leadership in Jewish Education: Recruitment, Retention, and Development", 1999.

For more information on this collection, please see the finding aid on the  
American Jewish Archives website.

---

# Memo

**To:** Seymour Fox, Adam Gamoran, Ellen Goldring, Mark Gurvis, Annette Hochstein, Alan Hoffmann, Barry Holtz, Elie Holzer, Dan Pekarsky, Nessa Rapoport, Leah Strigler

**From:** Gail Dorph

**Date:** 04/26/99

**Re:** Research Papers

---

In February, we agreed to distribute each study to the people upon whose interviews the studies were based. They were sent out last week and enclosed, you will find a set for yourself:

- Lay Leadership in Jewish Education: Recruitment, Retention, and Development by Pearl Beck
- Jewish Educational Leadership Development by Sally Gottesman
- Synagogue Change in America: A Map of Synagogue Change Initiatives by Lisa Malik
- Summary Report on TEI Cohort II by Renee Soloway Wohl

**Lay Leadership in Jewish Education: Recruitment, Retention, and  
Development**



**March 1999**

**The research in this report was generously supported by funding provided by the Mandel Foundation.**

**The opinions expressed in this report are those of the author and do not necessarily reflect the views of the funding agency.**

## Lay Leadership in Jewish Education: Recruitment, Retention, and Development

### I. Introduction

Governing boards consisting of lay people have long been central to American Jewish organizations. Lay leaders who provide organizations with one or more of the legendary “three W’s” – wealth, wisdom and work – are highly respected by the larger Jewish community. In fact, research indicates that the high value placed by Jews on being charitable is related to their actual charitability. When studying philanthropic giving, Sirota & Alper (1988) found that being Jewish was the one characteristic associated with being a major donor.

Historically, board membership was a reflection of one’s elite social status and went hand in hand with philanthropic activity. In her study of elite philanthropy, Ostrower (1995) observed that philanthropy “becomes a mark of class status that contributes to defining and maintaining the cultural and organizational boundaries of elite life.” Joining a board is therefore as much about status maintenance and prestige as it is about doing good.

Within the Jewish world, as in the general world, non-profit organizations are situated on a prestige hierarchy. Higher status organizations receive larger philanthropic gifts and an appointment to one of these boards is considered a status symbol. Ostrower found that educational and cultural institutions typically receive the largest gifts from donors and are therefore viewed as high status institutions. Universities, and particularly Ivy League universities, are the primary recipients of these donations.

However, Ostrower’s research also documented that among the three major religious groups, Jews are least likely to contribute to pre-college level educational institutions; while 44% of Catholics and 18% of Protestants give their largest philanthropic gift to a pre-college level school, only 8% of Jews do so. Research on

the boards of major national Jewish organizations also found evidence of the relative low status of Jewish educational organizations (Horowitz, Beck and Kadushin, 1997).

Nonetheless, over the past 30 years, Federations have been increasing their allocations to Jewish education. This occurred despite the dearth of major donors to pre-college Jewish educational institutions and despite these institutions' general lack of prestige. (Although a portion of this increase is attributable to concern about Jewish continuity, the major growth occurred prior to the 1990 National Jewish Population Survey's dissemination of the 52% intermarriage rate.) From 1957 to 1973, Federations' total allocations for Jewish education increased from 10% to 21% (Wertheimer, 1997). By 1984, the amount allocated for Jewish education reached \$50 million, which comprised 26% of all allocations. (This represented a 45% increase for Jewish education as opposed to a 33% increase for all other local allocations.)

Concurrent with Jewish education being catapulted to a more prominent position on the Jewish communal agenda, there occurred a surge of interest in governing boards. This increased interest is attributable to several factors that are affecting the Jewish, as well as the general, non-profit world – the most important being the increased competition for philanthropic funding. The escalating demand for the services provided by non-profits and the increased scrutiny of these organizations are also responsible for this renewed interest in governing board membership and activities (Axelrod, 1998).

When a blueprint for improving Jewish education was published in 1991, "A Time to Act: The Report of the Commission on Jewish Education in North America," special note was taken of the enormous potential represented by community based lay leaders who serve on governing boards. In fact, lay leadership development was

included as one of the five major elements in the overall plan to upgrade and revitalize Jewish education.

A number of strategies will be developed to increase community support for Jewish education. Their aims are to: recruit top community leaders to the cause of Jewish education; raise Jewish education to the top of the communal agenda; create a positive environment for Jewish education; and provide substantially increased funding . . . Top community leaders will be recruited individually to the cause of Jewish education by members of the Commission and other influential personalities who are able to convey the urgency of providing support for Jewish education.

Nearly a decade has passed since "A Time to Act" was published. The current study was prompted by the ongoing belief that a strong partnership between involved and committed lay leaders and professionals is essential for improving the quality and raising the profile of Jewish education in America. The project's ultimate goal is to expand the pool of people with talent and resources who are interested in Jewish education and are willing to serve on boards of directors or in other lay leadership capacities or as funders of Jewish education.

## **II. Research Goals**

The research aimed to address the following goals:

1. To descriptively profile the current Jewish education lay leadership;
2. To identify the factors that motivate lay people to become involved and to remain productively involved with Jewish educational institutions;
3. To identify challenges to effective board functioning;
4. To recommend strategies for recruiting capable lay leaders, for sustaining their involvement in Jewish educational institutions, and for strengthening board functioning;

included as one of the five major elements in the overall plan to upgrade and revitalize Jewish education.

A number of strategies will be developed to increase community support for Jewish education. Their aims are to: recruit top community leaders to the cause of Jewish education; raise Jewish education to the top of the communal agenda; create a positive environment for Jewish education; and provide substantially increased funding . . . Top community leaders will be recruited individually to the cause of Jewish education by members of the Commission and other influential personalities who are able to convey the urgency of providing support for Jewish education.

Nearly a decade has passed since "A Time to Act" was published. The current study was prompted by the ongoing belief that a strong partnership between involved and committed lay leaders and professionals is essential for improving the quality and raising the profile of Jewish education in America. The project's ultimate goal is to expand the pool of people with talent and resources who are interested in Jewish education and are willing to serve on boards of directors or in other lay leadership capacities or as funders of Jewish education.

## **II. Research Goals**

The research aimed to address the following goals:

1. To descriptively profile the current Jewish education lay leadership;
2. To identify the factors that motivate lay people to become involved and to remain productively involved with Jewish educational institutions;
3. To identify challenges to effective board functioning;
4. To recommend strategies for recruiting capable lay leaders, for sustaining their involvement in Jewish educational institutions, and for strengthening board functioning;

### III. Methodology

The findings are based on 46 structured, in-person interviews conducted with lay leaders in Cleveland, Baltimore, and Seattle. Each interview lasted for approximately one hour. The three cities were selected to represent different points in the continuum of American Jewish life. Baltimore represents an older, more established East Coast center of Jewish life, containing a large Orthodox population. Seattle, on the West Coast, has a smaller – but growing – Jewish community, with newer Jewish institutions. Cleveland, situated in the Mid-West, is known as an extremely philanthropic community containing a variety of Jewish institutions and a particularly committed laity.

To identify appropriate people to interview, we first contacted the director of the local Bureau of Jewish Education (BJE) in each city (JECC in Cleveland; CJE in Baltimore; and JEC in Seattle). We requested a list of the key people who serve on the boards of local Jewish educational institutions. (We also requested to speak to individuals who were responsible for the Jewish educational portfolio within Jewish institutions whose primary purpose might not comprise Jewish education - a synagogue, for example.)

The interviewed lay leaders included: day school presidents and board members; Hebrew (supplementary) high school presidents; presidents and board members of local Bureaus of Jewish Education; chairs of synagogue education committees, board members of Jewish Community Centers, and chairs of Federation education and allocation committees. Several of those interviewed also served on family foundations.

In all three cities, the largest proportion of those selected to be interviewed belonged to the local BJE board. Because the BJE functioned as an umbrella organization in two of the cities, a large percentage of those interviewed also served on the board of



another local Jewish educational institution. In fact, many of those interviewed were active in more than one Jewish organization. Based on these multiple affiliations, it is estimated that the 46 people interviewed for this study were affiliated with approximately 120 different local and national Jewish organizations.

#### **IV. Findings**

##### **Data Analysis and Data Presentation**

This study's findings are based on information obtained from structured, open-ended interviews. The reader should keep in mind that those interviewed do not constitute a representative sample of people serving on the boards of educational institutions throughout the country. However, a systematic process was used to select the three cities (as previously reported) as well as the key informants in each of the cities. For the most part, the data are treated as qualitative, rather than as quantitative. The one exception is the profile section in which an attempt has been made to derive a demographic portrait of the nearly fifty board members who were interviewed for this study. For the most part, the findings presented in the results section consist of responses made by several people. (An attempt will be made to distinguish responses that represent a majority of informants from those that represent only a few.)

Because no prior research has been conducted in this area (to our knowledge), the current study is exploratory in nature. The short-term goal is to derive some basic hypotheses regarding the board members and the boards on which they serve. If deemed desirable, these hypotheses can then be tested at a later date using more empirical methods.

The major findings, which were culled from the interviews, will be presented in the following four sections:

A: Board Member Profile

B: Board Member Recruitment, Motivations for Joining Board, and Board Member Retention

C: Board Functioning

D: Major Challenges to Jewish Education

## **A. Board Member Profile**

### **1. Demographics**

#### **Age**

Interviewees' ages were estimated and then categorized. The categories consisted of the following three groups: ages 35 to 50; ages 51 to 65; and ages 66 and over. Although these were "crude" categories, the determinations were not difficult to make. Approximately 50% (25) of those interviewed were between the ages of 35 and 50 (most were in their mid 40's); another 30% were between 51 and 65 years old. The smallest category (15%) comprised those ages 66 and older. (This is not surprising since education is a major concern for parents of school-age children.)

#### **Gender**

Women comprised nearly one-half (48%) of those interviewed. The proportion of women on the boards of Jewish educational institutions is extremely high, even for local organizations that tend to have a greater proportion of women on their boards than national organizations do.

### **Gender by Type of Organization**

In general, it appeared that female board members were more likely to be found on the lower status synagogue boards and synagogue education committees, whereas the males were rarely found in organizations on this level. Rather, men were more likely to serve on high power, higher status committees such as the Federation education allocation committee. These findings parallel those of Babchuk, Marsey and Gordon (1960). They found that the “most vital agencies had the highest operating budgets . . . The higher the rank of the board, the higher the status of its members.”

### **Gender by Age**

In two of the three cities, the female board members were considerably younger than the male board members. It appears that in these two cities, at least, the new generation of Jewish educational lay people consist primarily of women. Although this can be perceived as a positive finding – especially in light of the typical gender inequity on boards – in reality, gender imbalance in the direction of a female majority can also prove problematic. In her book on women in the non-profit sector, Odendahl (1994) warned that:

As more women assume leadership positions in nonprofit organizations, they may carry their traditionally subservient family status with them. Regardless of class, the voluntary boards on which women hold leadership roles are often gender segregated. Except for national women’s organizations, these nonprofit boards on which women are equitably represented appear to be community based, with relatively small budgets and influence.

### **Work Status**

Several of the older men were retired, while all the younger men were employed. Most of the interviewed women were either working or had taken some time off to be with their young or school-age children. Most of the younger women held advanced or professional degrees. A handful of middle-age women were full-time volunteers.. The high level of working women paralleled the findings of a study concerning the board members of national Jewish organizations (Horowitz, Beck, and

Kadushin, 1997). That study found that younger women (age 52 and under) were twice as likely to be employed full-time (both salaried and self-employed) as the older women (age 53 and over). Since women have traditionally represented the backbone of a board's workforce, the increased proportion of working women on the boards will have a considerable impact on board functioning. Specifically, it will result in fewer women being available for "board work" and for fewer hours.

### **Jewish Background**

A large majority of the interviewees had a minimal Jewish background, typically consisting of several years of study in a supplementary school. Few received any formal Jewish education subsequent to their bar/bat mitzvah. However, many had taken advantage of the multitude of locally available learning opportunities to enhance their Jewish knowledge. A few of the board members had single-handedly funded Jewish learning programs and educational experiences in their communities.

### **Wexner Heritage Program Graduates**

One-quarter (12) of those interviewed had participated in the Wexner Heritage program. Wexner program graduates were unanimous in their enthusiasm for the program. The most superlative terms were used to describe the program: "Wexner was fantastic . . . It brought Jewish life to be the central focus of my existence;" "It made a tremendous impact on my life;" "My kids would not be in a Jewish day school if not for Wexner;" and "The Wexner program helped me to embark on my own Jewish educational journey." Most importantly, Wexner graduates claimed that the program was "the catalyst" for their increased communal involvement as well as for their quest for Jewish knowledge.

### **Jewish Education Received by Board Members' Children**

Nearly 40% (18) of those interviewed have provided their children with a more extensive Jewish education than they themselves had received. The other 60% are providing (or have provided) their children with a level of Jewish education resembling their own Jewish education - within either the Jewish day schools or the

supplementary schools. Fifty- percent (24) of those interviewed with school-age children enrolled their children in Jewish day schools. In addition , three of the older interviewees who had not sent their children to Jewish day schools reported that their grandchildren are currently attending day schools.

In general, younger board members appeared especially concerned about the quality and extent of their children's Jewish learning experiences. This concern among the younger generation probably reflects the enhanced value that they place upon Jewish learning and also the larger number of available learning opportunities.

## **2. Career Paths and Aspirations**

### **Local and National Lay Career Paths**

For most of those interviewed, involvement on the boards of local educational institutions represented their first Jewish board involvement. Many board members subsequently became involved on other local boards, typically the umbrella Jewish educational organization (JECC in Cleveland, CJE in Baltimore, or JEC in Seattle) or the local Federation.

When queried, the majority of those interviewed asserted that they did not aspire to hold "higher" lay positions. Few board members were interested in serving on national boards. As one active local board member stated, "My focus has been local and will probably continue to be because I feel that I can make a difference on that level." Others who preferred remaining local in their lay involvements reported that they enjoyed the "hands-on" nature of local involvement more than the politics that are perceived to be endemic to national organizations. A handful of those interviewed had served, or are currently serving, on national boards. One disgruntled former national board member provided the following critique of this experience: "Voluntary work on the national level was a lot of talk and even less action."

The few lay leaders who were interested in becoming involved on a national level did not appear very knowledgeable about the national Jewish organizational world. In fact, despite their apparent lack of ambition, one wonders whether these particular board members are indeed uninterested in pursuing "higher office" or alternatively, lack the information and requisite skills to achieve this kind of mobility. For example, several of those interviewed possessed strong board development or leadership skills. They mentioned that given their "skill-sets" they were surprised that they had not been approached by other Jewish organizations, including those on a national level. However, these talented board members had apparently not considered approaching these organizations - directly or indirectly - to inform them of their interest and availability.

### **Volunteer to Professional Career Path**

The research identified an unusual, and perhaps new, career path within the Jewish organizational world. Six (25%) of the interviewed board members (all women) had become involved in the Jewish world first as volunteers. During the course of their involvement they acquired or sharpened specific skills that enabled them to obtain full-time paid employment in Jewish organizational settings. At the time of their interview, they were actually wearing two hats: that of a Jewish professional and that of a Jewish lay leader. These individuals appeared to be experiencing role enhancement rather than role confusion. One stated: "If I did not have the professional involvement I would not have so much access and would therefore not experience the same level of gratification." (Interestingly, this trend did not apply to any of the men who were interviewed.)

## **3. The Role of Jewish Learning for Lay Leaders**

### **Opportunities for Personal Transformation Provided by Jewish Learning**

Involvement in Jewish learning has led to a personally transformative experience for some board members. Although the actual consequences have varied, overall, Jewish learning among the lay participants has resulted in an increased feeling of

confidence about themselves as Jews. Looking toward the future, one board member stated, "Once those involved in Jewish education have the tools to learn more, their personal esteem as well as their esteem for Jewish education will increase."

### **Growth of Jewish Education for Lay Leaders and the Need for Expanded Jewish Educational Opportunities**

Most lay leaders did not receive extensive Jewish education when they were growing up and appreciate Jewish learning opportunities offered to them as adults. Several board members noted with amazement how their peers "have come a long way" in their own Jewish education as witnessed by the number of lay people who have voluntarily given a "dvar Torah" (Torah talk) at a board meeting or board retreat. Another board member stated, "The ship is beginning to turn. Jewish leadership is not as delinquent about being Jewishly educated as it used to be." According to yet another board member: "Jewish lay leaders want to study Jewish texts. They admit to being Jewishly ignorant. They are interested in taking a serious look at issues they are facing and making Jewish texts relevant to these issues." Those lay leaders who have become more Jewishly educated often decry that "Jewish lay people have a level of Jewish illiteracy that they themselves wouldn't tolerate in the secular world."

Despite – or possibly because of -- the Wexner program's apparent success in combating this illiteracy, lay leaders who are oriented towards Jewish learning maintained that similar learning programs need to target even larger numbers of lay leaders, especially in the major cities. In the words of a Wexner graduate: "Although there is a confluence of ex-Wexner people on Federation's education front, there is a need to have five times as many people with that background. For example, although there were eighteen Wexner participants in Baltimore, that is not sufficient mass for a city of that size."

### **The Parameters of Lay Leadership Education**

Although board members claimed to want more Jewish knowledge, intensive, long-term study did not appear to be the type of Jewish educational experience they preferred. As one lay leader remarked, “Just how much Jewish education will Jewish leaders subject themselves to?” Another board member stated: “Because Jewish lay leaders have such a superficial Jewish background, they cannot begin to imagine how deep it can be and how intellectually rigorous it can be. However, Jewish learning is still too peripheral to their lives. Therefore, at this point, when they participate in Jewish learning they want charismatic leaders who can provide entertainment as well as education.”

### **The Role of Perks in Lay Leadership Education**

Lay leaders were particularly fond of the perks these programs provided, such as opportunities to meet lay leaders from other cities and trips to Israel as well as to American retreat centers. When Baltimore launched a learning program lacking in perks, it did not prove successful and experienced a high attrition rate.

## **B. Board Recruitment, Motivations for Joining, Gratifications, and Retention**

### **1. Board Recruitment**

#### **Identifying Talented Leadership**

There was a general consensus among those interviewed that in cities with a substantial Jewish population there are many people who possess the potential to be exemplary lay leaders. The challenge is to identify these talented individuals and then to recruit them to communal institutions. In general, two “types” of people are on the “short list” for board membership: members of well-known (usually philanthropic) families or those who already serve on other Jewish boards of directors. In reality, these two types are often from the same pool.



To expand the pool, it is advisable to implement more systematic as well as more expansive recruitment procedures. A more systematic approach would comprise compiling community-wide databases that would contain a comprehensive listing of people's skills and qualifications. A nominating committee could then use this information to identify individuals whose skills match the skill requirements of a given organization's strategic plan. For example, if the strategic plan calls for an expanded marketing effort, then the board's nominating committee can search the database for individuals with marketing skills.

The "inclusive" approach refers to targeting a wider population of people such as Jewish women and men serving in both professional and lay positions in general (non-Jewish) non-profit organizations. Even though these individuals are not considered "Jewish insiders", they often have the requisite skills for serving on a Jewish educational board. In addition, several lay leaders emphasized the importance of recruiting well-known and highly regarded people from the community to serve on these boards. The involvement of high status individuals will lend both legitimacy and acceptability to joining the boards of educational institutions.

Recruitment issues are different in cities with smaller Jewish populations, such as Seattle. In these areas, people expressed concern about the size of the existing talent pool. One board member worried about the dearth of lay leaders and suggested that "Jewish educational institutions reach into the congregations and schools to identify and train future leaders."

### **Targeting Adult Learners**

Another way of widening the recruitment net is to target people who have become involved in Jewish learning as adults. Many of these individuals have only recently begun to recognize and appreciate the benefits of Jewish education. Adult Jewish learners are often extremely motivated and enthusiastic and therefore represent a potential fertile pool of lay leaders. Based on the findings of this research, it does not appear that any systematic effort is being made to identify and educate adult

Jewish learners about the larger Jewish community and specifically, its educational infrastructure.

## **2. Motivations for Joining Boards**

### **To Maintain a Tradition of Family Involvement**

Our research found that people become involved in Jewish educational institutions for diverse reasons. A substantial number – though not the majority -- of the younger (between age 35 and 50) lay leaders had a family history of philanthropic involvement. A larger proportion of the respondents reported that their family of origin had been civic-oriented, despite the fact that they themselves were not major “givers.”

Although many board members from well-known families were drafted to serve on boards, others took a more proactive approach. One individual from a communally involved family carefully researched various options before choosing to join a board of an organization that provided him with the type of “hands-on” experience he was seeking.

### **To Insure a Quality Jewish Education for their Children**

Many of the board members first became involved with a particular institution when their school-age children were enrolled in that particular institution. As one board member asserted, “Parents tend to focus where their kids are.” Several of those interviewed mentioned that through their board involvement, they were able to “play a continuing role in their family’s life and development.”

### **To Continue their Involvement with Jewish Education**

As mentioned above, one-quarter of those interviewed had participated in Wexner and credited the program with inspiring them to be involved in Jewish education on a communal level. Others expressed pride in the quality of their own formal Jewish educational experiences or had been “turned on” by a specific adult Jewish

educational experience (other than Wexner). For example, one board member, with a minimal Jewish educational background, described how Aish HaTorah recruited him for a Torah study course. "Although I originally began learning as an intellectual exercise, I soon began relating to Judaism as a personal experience with meaning consonant with my own world view." Another board member said "Being involved in Jewish education gives me balance, adds something to my life, and shows me that there is a purpose to it."

### **To Act on their Sense of Jewish Communal Obligation/ To Fulfill a Mitzvah**

Despite the deeply Jewish nature of their communal involvement, only one board member, when asked about the impetus for his voluntary activities, stated: "I do it because it's a mitzvah!" Many of those interviewed, however, mentioned their strong sense of communal responsibility. In fact, quite a few of the communal leaders reiterated their credo that it is "wrong to say no when you are asked."

One respondent was motivated to become communally active after suffering a near-fatal heart attack while in his 40's. He reported that this event precipitated a re-evaluation of his entire life direction. Consequently, he committed himself to doing charitable work in the Jewish community.

## **3. Gratifications Derived from Board Involvement**

### **Personal Jewish Gratification**

On the whole, the board members felt extremely gratified working on Jewish educational issues. Typifying these reactions are statements such as: "The experience has enhanced my Jewish identity," "I'm on my own journey of Jewish education and feel that it's important to be involved in things I'm passionate about," and "I feel better about myself because I am in a Jewish environment several times a week."

Affiliating with Jewish educational institutions has provided board members with many opportunities to engage in Jewish learning. Some of these opportunities

are open to all community members (e.g. courses at the Jewish Colleges), while others are more exclusive in nature (e.g. Wexner, Jewish learning conducted at board meetings). Many board members expressed the belief that they have grown Jewishly through participating in these learning experiences. Some board members have pursued Jewish learning on their own after they completed a board sponsored program of study.

### **Gratification of Providing Positive Jewish Educational Experiences**

Despite the heavy workload and frustrations often associated with voluntary organizational work, the board members say that they feel it is all worthwhile when they see the impact of their work on their children and on other children as well. As one board member said: "Seeing my kids and their friends loving to be Jewish keeps me going."

### **Gratification of Being Involved in a Successful Endeavor**

People enjoy being a part of a successful endeavor. Board members who were involved in the establishment or in the significant expansion of Jewish schools described feeling a particularly strong sense of accomplishment. One interviewee stated, "I feel it is both fun and rewarding when our organization is running well, meeting its budget and expanding, and when there is a good group of people to work with." Another person described a particular high point as occurring when "the light-bulbs go off . . . Such as what happens when people interrupt each other because they are so excited about what they're doing."

## **4. Board Retention**

Even when queried about problems specific to retention, few lay leaders separate the set of factors that propel people to join boards from the ones that motivate them to remain on the boards. The issues relating to board retention are less related to keeping members from "dropping out" than with productively engaging them on an on-going basis.

A related issue is the inequitable distribution and assumption of board responsibilities which can lead to burnout especially among talented board members who are also extremely generous with their time. As one such board member stated, "You can't always take from lay leaders until they are sucked dry. The Jewish community needs to give something back to lay leaders so that they feel rejuvenated by their efforts . . . Perhaps that something is Jewish learning."

Burnout typically occurs when just a few lay leaders assume the lion's share of the board work. When asked, for example, how many hours they devote to their board-related activities, most lay leaders reported that they spend approximately 3-5 hours per week. However, a small percentage (mostly board presidents) reported spending approximately 20 hours per week. This kind of extreme imbalance reflects a poor distribution of board work (or talent deficits in specific areas) and is ultimately detrimental to organizational functioning. (Some strategies for addressing this problem are discussed in the following section.)

## **C. Board Functioning**

### **1. Problem Areas**

Among board members, there is a wide range of recognition of existing organizational problems. While some organizations appear to recognize and address problems before they wreak havoc, others tend to be more crisis driven. Several boards that have identified specific challenges and issues that require attention are beginning to seek the assistance of outside consultants and of new board members with particular skills. (Board members of Orthodox institutions appeared to be the least critical of how their boards were functioning.) Information obtained from the interviews suggests that there are three major problem areas facing boards. These problem areas relate to board structure, board processes, and board values.

### **Board Structure**

According to one board member, "Many lay leaders have the necessary skills but don't always have the opportunities to apply them." Because of the sheer number of people on many boards and the cumbersome ways they are structured, it is often difficult for members to feel that they are getting anything accomplished. Board members were especially critical of the governance process characteristic of the large umbrella Jewish educational organizations. One leader declared that this type of board is "totally unworkable," while another stated, "A board's upper limit should be 17 and not 30." Lay leaders serving on very large boards remarked that they often felt as though they were "rubber stamps" and did not believe that they were having an impact on the organization.

The lack of an existing committee structure on many boards is also regarded as problematic. The implementation of committees is regarded as a strategy to promote greater board involvement, which then helps make the board more dynamic. A related structural issue concerns the lack of a clearly defined line of succession, including the grooming of insiders for top-level positions. Such a "line of succession" is necessary to motivate talented people to remain active on a board.

Board composition is another structural issue confronted by many boards - especially school boards. Among those interviewed there was a consensus that boards need to expand beyond parents of children currently enrolled in the school to include non-parents. It is widely believed that because parents have so many vested, short-term interests related to their children's schooling, they are often not well equipped to deal with long-range and strategic-planning decisions.

### **Board Processes**

Most of those interviewed expressed extreme dissatisfaction with the board process (which is often related to the structural difficulties described above.) The process was described as "too bogged down," "preoccupied with the trivial," and "lacking the big picture." One board member stated, "It is a particular challenge to keep the

board meetings and the board process active and dynamic, since most of the major issues are resolved before they reach the board." Another remarked, "I find it frustrating when the Executive Committee does most of the board work because lay leaders want to believe that their involvement is meaningful and their time is well spent." Yet another one complained that "the meetings are just too long and excruciatingly slow."

To improve board functioning, experts have advocated introducing professional standards to board positions and board activities. These standards include: creating job descriptions for board members with specific committee assignments, limiting the number of unexcused absences, and implementing job-related evaluation criteria. The evaluation protocols would be used to evaluate all professionals, all boards members, committee heads, and board officers including the president. Although board members recognize the potential benefits of introducing tougher standards, they also expressed some trepidation about moving in this direction. Their concern relates to both the actual costs of implementing these changes and to the possibility that introducing such stringent standards might deter talented individuals from assuming board positions.

### **Values**

The values underlying the boards' activities and relationships were also the target of criticism. Three areas pertaining to values were singled out as particularly problematic: the lack of mutual respect evidenced by board members' behavior; the lack of confidentiality regarding sensitive information; and the excessive respect accorded to wealthy people on the board. Several board members suggested addressing these problems through a study of Jewish values.

The issue relating to compromised confidentiality is especially difficult because it straddles all three areas of board functioning. Breaches of confidentiality represent lapses in an organization's process and values and also reflect the overlapping social networks that characterize many Jewish communities. For example, it is often

difficult to maintain confidentiality when the group of people who serve on a day school board also attend synagogue together and, in addition, reside in the same neighborhood. In the words of one board member, "We're all a family and in a family we know each other's dirty laundry." This lack of boundaries contributes to informational leakage. When this happens, board members become increasingly reluctant to express themselves truthfully at meetings, which is clearly detrimental to board functioning.

### **Long-term Vision**

The development of a long-term vision, often through a formal strategic planning process actually spans the above three categories, rather than fitting neatly into any one of them. According to board members, having a long-term vision provides an organization with a solid agenda that enables it "to focus on the larger issues rather than on putting out the immediate fires."

## **2. Relationship Between Board and Professionals**

For Jewish educational institutions to function effectively, there needs to be a smooth working relationship between the board and the staff. This relationship is often contingent upon clear role definitions. The major problems endemic to lay-staff relationships can be characterized by the antipodes: excessive micro-management of staff activities by the lay leaders or professional over-involvement with the organization. This problem is definitely not unique to Jewish educational institutions. In his book Boards That Make A Difference (1997), John Carver quotes the management expert Robert Gale, who observed, "One of the key problems is that many boards are either too weak to accomplish anything or so strong they wind up managing the organization." Depending on the particular board-staff dynamic characteristic of their institution, the board members interviewed for this research provided examples of both extremes.



### **Micro-Management of Organization by Board Members**

Many lay leaders recognized that Jewish educational institutions are often heavily lay lead to the extent that board members are involved in an institution's day-to-day functioning. The lack of role definition and boundaries between board and staff (which often coincide with the boundary overlap issues described above) often contributes to the board's assumption of the "management" role. This, in turn, can result in the staff's feeling un-empowered and undervalued and to the general feeling, often expressed by Jewish professionals, that they are "not being treated well" by the lay boards.

Several of those interviewed described a "founders' syndrome" that often results in board over-involvement. This occurs when a few people have raised the money to fund the institutions themselves and therefore believe that they have the power to mandate how the institution should operate.

### **Professional Over-Involvement in Management of Organization**

Several board members (typically those involved on the boards of long-standing day schools) reported that the power of their institution did not reside with the board but rather with a powerful school director. Some lay leaders admitted that due to their own feelings of inadequacy regarding Jewish education issues, the board functions primarily in an advisory capacity and relegates most educational policy decisions to the professionals. (Among other problems that can result from leaving the board "out of the loop" in this manner is that the board receives insufficient information about how the institution is functioning.)

### **Towards a Collaborative Board-Professional Governance Model**

More recent theories and guidelines for improving the relationship between boards and staff (Carver, 1997; Axelrod, 1998) advocate the development of a more collaborative relationship but with distinct roles for each party. In the governance model recommended by Carver, the board assumes a results oriented, strategic leadership role that (among other functions) requires it to: establish an outcome

based mission; adopt a long-term viewpoint; serve as the repository of organizational values; engage in creating rather than approving; and, most importantly, clarify those aspects of management that need tight versus loose control.

Those interviewed described their own visions for an improved board-staff relationship. For example, one board member remarked, "Without sufficient professional support the board cannot do its job. The professionals need to prepare lay leaders with input in the form of written materials and speakers. The lay leaders should then use this input as the basis for their decision-making." Another lay leader said, "The boards should identify needs but not come up with the answers."

One professional Jewish educator commented that the lay-professional problem is rooted in both parties being inadequately trained about the parameters of their own roles and about their relationship to one another. The role confusion is further exacerbated, according to this professional, by the inappropriate public school administration model taught to Jewish school administrators in education graduate schools. This model was deemed inappropriate because most independent Jewish schools do not resemble public schools, administratively. Instead, Jewish schools resemble colleges and therefore require that administrators be able to both "manage out" (e.g. be in charge of the physical plant as well as capital and board related issues) as well as "manage in" (e.g. supervise staff). This suggests that professional administrators would also benefit from receiving additional training regarding the nature and scope of their job.

### **3. Board Development and Board Training**

Although there exist many models of leadership development, they all seem to address the following question articulated by a lay leader: "Although there are some people who are born leaders, and those who are very shy and quiet will probably never succeed at being leaders, how do you take the vast majority of

people in the middle (e.g. not born leaders) and train them to be competent leaders?"

### **Formal Leadership Training**

Our research indicates that almost every lay leader had participated in some type of leadership training. However, because this training was often generic and abbreviated, it did not necessarily result in improved board functioning. For example, in Cleveland, the leadership training provided by the Federation focuses mostly on Federation-funded organizations and on the issues facing the local community. It does not specifically address issues such as meeting facilitation skills, optimal board structure, optimal board size, or developing a plan for leadership succession. (Nevertheless, despite the absence of formal training, the research found that there are board members on every board who take the initiative to seek out whatever training is available.)

Rarely, if ever, did formal board training figure in a board's annual plan. Several organizations have sub contracted, on an ad-hoc, with consulting firms that provide board training. However, this form of training is usually very limited and is provided very infrequently (e.g. 3 hours of training provided once every 3 years). Only two organizations reported that they are currently engaged in a serious board development effort with the assistance of a professional board development organization. On the whole, governing boards appear to be ambivalent about allocating institutional resources for leadership development and board member training which are not typically regarded as priority areas.

### **Informal Training/Mentors**

Board members had different conceptions of what constitutes a good leader. While some maintained that leadership is a "genetic characteristic" that cannot be taught, most people referred to leadership as a set of learned behaviors. For example, one board member stated: "Being a good leader is knowing when to speak and when not to speak."

Upon embarking on their “lay careers,” no board member reported having had a board appointed mentor. However, many lay leaders recalled having an informal mentor relationship with a more experienced lay leader who “taught them the ropes,” often in lieu of a formal, board-sponsored orientation and training program. A substantial number of lay leaders said that they have served as informal mentors to the next generation of lay leaders. Most of those interviewed advocated instituting more formal board training supplemented by an informal (mentor-like) “buddy system”, especially for first-time board members.

#### **D. Major Challenges to Jewish Education**

Approximately one-half of the lay leaders who were interviewed were asked what they considered to be the “major challenges facing Jewish education.” When the responses were reviewed and coded, the following major categories were the most frequently mentioned.

##### **1. Lack of Proper Funding**

The major problem identified is the continued under-funding of Jewish education and Jewish educational institutions. Money is needed to train and recruit quality teachers, to improve the physical facilities, and to ensure that schools have adequate administrative staff.

##### **2. Lack of Quality Teachers and Administrators**

The lack of well trained, competent Jewish educators and administrators was mentioned repeatedly. The perception among lay leaders is that teachers appear to be trained either in content or in pedagogy, but rarely in both. Furthermore, the scarcity of talented teachers serves to drive up the cost of the “good’ educators.

### **3. Lack of Respect (“Yichus”) for Jewish Educators and for Jewish Education**

The lack of communal respect for education in general and Jewish education in particular is perceived as a major obstacle to upgrading the status of, and funding for, Jewish education. As one leader remarked, “This problem will undoubtedly persist until children can be encouraged to pursue careers in Jewish education.”

### **4. Lack of Understanding about How To Improve Jewish Education**

Although an increasing number of lay leaders have accepted the premise that Jewish education is important, few appear to have seriously explored how to improve Jewish education. In the words of one board member, “The greatest problem is a pedagogical one: how to reframe what we want people to know.” There has been a frustrating inability to plan with a total community perspective in mind. The leadership needs to define Jewish education more broadly to include informal educational experiences such as retreats, summer camps, trips to Israel, and celebrations of Shabbat.”

### **5. Lack of Professionalism on the Boards**

Poorly functioning, undynamic, boards lacking in decision-making authority were identified as problematic by a large number of lay leaders. Board members expressed frustration at unclear board expectations and felt that the collective board wisdom was not being tapped. Board members who did not respect the confidential nature of board discussions and members who “didn’t know when to talk and when to stop talking” were also singled out for criticism.

### **6. Lack of Jewish Knowledge among Lay Leaders**

Despite the increase in Jewish learning, many lay leaders were disturbed that important decisions pertaining to Jewish education continue to be made by “people who are Jewishly ignorant and who don’t recognize the importance of Jewish education.” According to those interviewed, this situation is the consequence of Jewish institutions deferring to people who contribute the most money. In the

words of an interviewed board member, "Unfortunately, there is a long tradition of American Jewish lay people deriving their Jewish identity primarily from their philanthropic activities rather than from their Jewish knowledge."

### **7. Poor Fiscal Management of Educational Institutions**

Against the backdrop of the recognized, overall funding inadequacy for Jewish education, several lay leaders raised questions about the quality of some institutions' fiscal management. For example, one board member referred to the schools' "insatiable need for dough," another asked, "Has someone ever figured out what percentage of the cost of Jewish education goes to educators?" and still another asked, "Can we ever give the schools enough money?" Similarly, some fiscally knowledgeable board members questioned the level of budgeting and accounting expertise possessed by the administrators who perform these functions.

## **V. Recommendations for Attracting Lay People to Jewish Education**

### **1. Convince Laity of Importance of Judaism and of Jewish Education**

Before American Jews "buy in" to Judaism and to Jewish education, they must first be convinced of its importance and the benefits to be derived from their involvement. To accomplish this, lay leaders suggested undertaking a well funded educational campaign. As one lay leader said, "You must bring in lay people one by one and try to connect with them by finding something Jewish in their heart and by showing them that there is "Joie du Juif," a joy in being Jewish.

### **2. Recruit Prestigious, Creative, and Interesting People to Serve on Boards**

Do what other non-profits do: recruit high-profile, high-status people in the community to the boards to indicate to others that it is socially acceptable to be involved. Recruiting people with "cachet" will create an experience where people will look forward to attending meetings. The growth of adult Jewish education has created other arenas within which to find potential lay leaders.

### **3. Create a Long-Term Institutional Vision**

Each organization needs to create a clearly articulated mission that focuses on long-term issues and which provides a solid institutional agenda. This vision is often developed through an in-depth strategic planning process dedicated to building a board on which, goal-oriented, meaningful work is being done.

### **4. Implement Professional Standards for Boards and Board Members**

Jewish board members bring very high levels of both professional and academic accomplishments to their board work. Therefore, the voluntary boards on which they serve should also adhere to high professional standards. The interventions required to raise these standards were championed by the interviewed board members who asserted that "if expectations are specified, people will rise to the occasion." If necessary, professional board development experts should be engaged to accomplish this goal. Among the changes that need to be made are the following:

- Institute more formal recruitment procedures based on databases containing community qualifications;
- Establish clear job definitions, including committee assignments, for all board members;
- Provide extensive orientation to all new board members;
- Compile a Board Orientation Book containing important board and organizational documents (e.g. policies and guidelines, by-laws, personnel guidelines, teacher contracts, board roster, meeting calendar, board expectations, organizational mission statement, etc.);
- Provide training in specific process skills (e.g. meeting facilitation, conflict negotiation, budgeting);
- Identify and groom insiders for future leadership positions;
- Establish strategies for leadership development;
- Develop criteria for evaluating overall board and board member job performance.

### **5. Design a Lay Leadership Development Program**

In the course of the interviews, lay leaders actually faulted themselves for “not seeing the big picture.” This is not really surprising given the extent to which each community -- and often each institution within a community -- functions in isolation. It is therefore important to provide lay leaders with structured opportunities to interact, to share information, to acquire additional Jewish knowledge, and to learn about the larger issues in Jewish education and in American Jewish communal life. This would also represent a strategy for “giving something back to lay leaders,” as recommended by one of our key informants.





## VI. Conclusion

As Jewish education assumes a more prominent place in the Jewish communal agenda, increased attention is being focused on the individuals who demonstrate their support by serving on the boards of directors of Jewish educational institutions. This study found that these boards are populated by a cadre of intelligent, professional and committed women and men who give voluntarily and generously of their time. The lay leaders' communal involvements are often intrinsically related to their own personal Jewish journeys. Many of these individuals came to Jewish learning as adults, a substantial number through the Wexner Heritage Program. Though their personal and denominational backgrounds vary, the profiled leaders share a devotion to promoting Jewish education as the foundation for life-long learning.

The research indicates that despite the high caliber of most board members, their talents and skills are not maximally utilized by the boards on which they serve. Those interviewed identified a range of difficulties related to board functioning and their adverse impact on the organizations.

At this important juncture, it is critical that problems be addressed by imbuing all facets of Jewish educational organizations with more stringent and professional standards and by insisting that all educational endeavors articulate a clear vision. The retention and productive involvement of this generation of lay leaders is contingent upon such changes taking place, as is the entire enterprise of revitalizing Jewish education in America.

## Bibliography

- Abzug, R. & Beaudin, C. Women on Board: Parallel and Subordinate Power Structures/Cultures in Voluntarism and Trusteeship. Yale University, PONPO Working Paper No. 221, 1994.
- Axelrod, N. Current Trends, Best Practices and Future Directions in Board Development. Prepared for the Council of Initiatives in Jewish Education, June, 1998.
- Babchuk, N., Marsey, R., and Gordon, C.W. Men and Women in Community Agencies: A Note on Power and Prestige. American Sociological Review, Vol. 44, pp. 399-404, 1960.
- Bradshaw, P., Murray, V. Wolpin, J. Do Non-Profit Boards Make a Difference? An Exploration of the Relationships Among Boards Structure, Process and Effectiveness. Non-Profit and Voluntary Sector Quarterly, Vol. 21 (3), Fall, 1992.
- Carver, J. Boards that Make a Difference. A New Design for Leadership in Non-Profit and Public Organizations. Jossey-Bass Publishers, San Francisco, 1997.
- Commission on Jewish Education in North America. A Time to Act. Lanham, Maryland. University Press of America, 1991.
- Drucker, P. F. Management: Tasks, Responsibilities, and Practices. New York: HarperCollins, 1974.
- Fenn, D. Executives as Community Volunteers. Harvard Business Review, Vol. 49, pp. 156-157, 1971.
- Horowitz, B., Beck, P., Kadushin, C. Women and Men on the Boards of Major National American Jewish Organizations. The Center for Social Research and the Center for Jewish Studies, The Graduate School and University Center of the City University of New York, 1997.
- Odendahl, T. Women and Power in the Non-Profit Sector. San Francisco, CA: Jossey-Bass, 1994.
- Oster, S. Strategic Management for Nonprofit Organizations: Theory and Cases. New York, Oxford University Press, 1995.
- Ostrower, F. Why the Wealthy Give. Princeton University Press, Princeton, New Jersey, 1995.
- Putnam, R. Bowling Alone: America's Declining Social Capital." Journal of Democracy 6, No.1. January, 1995.

Sirota & Alper Associates. New York City Volunteers and Gives. Prepared for Daring Goals for a Caring Society, 1988.

Taylor, B., Chait, R. and Holland, T. Trustee motivation and board effectiveness. Nonprofit and Voluntary Sector Quarterly, pp. 207-224, Summer, 1991.

Wertheimer, J. Current Trends in American Jewish Philanthropy. American Jewish Year Book, 1997. (Eds.) Singer, D. & Seldin, R., The American Jewish Committee, New York, 1997.

