

# Achieving Excellence: Lessons Learned from Professional Development

Melissa **Donald** and Lyn **Light Geller**

*There are two ways of being creative. One can sing and dance. Or one can create an environment in which singers and dancers flourish.*

Warren G. Bennis

*Leadership and learning are indispensable to each other.*

Speech prepared by John F. Kennedy for delivery in Dallas the day of his assassination, November 22, 1963

*Talmud torah kneged kulam (Torah study is equivalent to all (of the other mitzvot).*

Mishnah Pei-ah 1:1

*Learning is achieved only in company.*

The Talmud

The sturdy foundation upon which substantive Jewish communal professional development programs are built can be viewed through the lens provided by these four quotes. This article explores the objectives, key components, benefits, and challenges of long-term professional development programs for the Jewish community, with special emphasis on UJA-Federation of New York's flagship program—the Muehlstein Institute for Jewish Professional Leadership.

Although we reflect on the experiences of a decade, the many challenges and changes we faced in the past year alone highlight the difference even a single year can make. Over the past 12 months, most communal agendas focused on the threat of workforce reduction, shrinking resources, and budgetary sustenance. Rewind only one more year to find agendas and conversations on the future and sustainability of our profession amidst a new emerging talent pool. And yet, we know that now more than ever, having “the right people in the right roles” (Collins, 2001) is an organization's most important asset.

The most significant percentage of dollars spent in the Jewish nonprofit field goes to our workforce. To maximize this investment, we must reaffirm our commitment to high-quality professional development programs.

## THE CASE FOR PROFESSIONAL DEVELOPMENT

As organizational stressors multiply in our field and all around us, it has never been more important to focus on the development of our human resources. Our community's ability to emerge on the other side of this economic crisis well positioned to move forward depends largely on the effectiveness of the professionals

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currently in place. How we cultivate and nourish our staff during this difficult time will influence significantly their desire to stay and our ability to retain them when the economy recovers. Professional development opportunities can be transformative experiences for participants and reap tremendous benefits for communal institutions as well.

The Nonprofit Sector's *Leadership Deficit Report* (Tierney, 2006) highlights the imperative of investing in leadership capacity. The 2008 study, *Ready to Lead: Next Generation Leaders Speak Out*, discusses barriers to next generation leaders pursuing nonprofit executive leadership positions, including lack of mentorship/support, unclear career paths, structural limitations, work-life balance concerns, and low lifelong earning potential. Research on early-career professionals in New York, conducted by a learning project team from the third cohort of the Muehlstein Institute (MI3), confirms these findings and adds concerns about professional development, organizational culture, and recognition as barriers to retention.

### PROFESSIONAL DEVELOPMENT AS A STRATEGY FOR CHANGE

Significant institutional change is often a painstaking process that results when multiple interventions are targeted at numerous variables. Professional development is one such "intervention." Although the point of influence is the individual, successful professional development programs share a broader mandate—to have an impact on the larger community.

For almost 40 years, UJA-Federation's Wiener Educational Center has enhanced the professional development of Jewish communal professionals from the New York area. The Institute for Not for Profit Management for Jewish Communal Service (INM-JCS) of UJA-Federation of New York's Wiener Educational Center and the Columbia University Graduate School of Business stood alone for many years as the only long-term professional development program provided for the federation system.<sup>1</sup> The original target audience for this program was CEOs. However, the CEOs soon learned the value of including their management teams in the change management inspired by INM-JCS. Thus all executive-level staff are now welcome to participate.

INM-JCS's success with executive staff made it clear that other levels of staff needed similar attention. Thus in 2002 the Muehlstein Institute for Jewish Professional Leadership (MI) was developed for emerging leaders, two to seven years in the field<sup>2</sup>; the Institute for Day School Management (IDSM) was created in 2006<sup>3</sup>; and most recently, in 2007, the program, "High Impact Strategies for Experienced Managers," was instituted for mid-level management.<sup>4</sup>

Over the past decade, the commissions of UJA-Federation have added professional development to their strategies for advancing their planning priorities.

<sup>1</sup>For the purposes of this article, long-term programs are defined as serious, ongoing learning opportunities, usually lasting for at least four months.

<sup>2</sup>The Muehlstein Institute initially included the collaboration of UJA-Federation with New York University's Robert F. Wagner Graduate School of Public Service and, in its last cycle, with Columbia University's School of International and Public Affairs.

<sup>3</sup>The IDSM for Jewish Day School Leaders is also a customized program of the Columbia University Graduate School of Business for UJA-Federation.

<sup>4</sup>This program is delivered for the Wiener Educational Center of UJA-Federation by A&S Global Management Consulting.

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Significant funds have been allocated to develop professional development programs for Jewish educators and synagogue staff, pastoral care training, and end-of-life care. Nationally and internationally as well, there has been a flourishing of these tailored programs.<sup>5</sup>

### **VISION AND VALUES**

The vision that guides this work builds on that described in John Ruskay's inaugural address, "Looking Forward" (see the Appendix). It is a vision of a caring, inspired, connected community enabled by professional leadership who are positioned to lead us into the next phase of Jewish communal life. Vital, thriving institutions, networks, and communities are needed to ensure a flourishing Jewish future, and professional development programs funded by UJA-Federation are working toward this goal.

UJA-Federation's professional development programs are guided by the following values: the inherent potential of each individual for growth and development, commitment to excellence and continuous learning, commitment to strengthen the Jewish community and the knowledge and systems that support it, creation of an environment that allows for growth and exploration, encouragement of risk taking, and innovation.

### **LESSONS LEARNED: SIX CRITICAL SUCCESS FACTORS**

Through supporting this work, multiple success factors have been identified. Below are six key ones.

#### **Building Community**

The power of the learning community formed through long-term professional development programs extends and deepens the learning for years beyond the life of the program. The mix of the cohort is an important aspect of the program design, and the exchange that results from it is an intended consequence. In fact, it is difficult to separate the value of the learning from the value of the learning community. What is clear is that the cohort and networks formed are central drivers of the experience. These new communities have the potential to transform the broader community through exposing similarities and reducing misperceptions of others. In the Muehlstein Institute, for example, the diverse mix of the cohort is intended to expose participants to individuals and institutions with whom they have little experience; in the day school management program, participants are exposed to colleagues with other ideological perspectives.

#### **Role of Leadership**

A highlight for all program participants is the opportunity for frank dialogue with accomplished leaders. Salons, fireside chats, and panels provide important opportunities to hear from those in leadership roles without the boundaries and limitations ordinarily present in the traditional organizational structure.

<sup>5</sup>For example, programs have been developed by the Foundation for Jewish Camp, Schusterman Foundation, Hillel International, United Jewish Communities, Jewish Community Centers of North America, Jewish Funds for Justice, Mandel Leadership Institute, and the American Jewish Joint Distribution Committee. Other local efforts have developed in communities; for example, the Darrell Friedman Institute in Baltimore and the Mandel Center in Palm Beach, Florida.

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Speaking openly in an intimate setting is a powerful experience. Moreover, leaders' willingness to dedicate significant time to professional development communicates to participants that these programs are important and warrant their substantial investment of time and energy. Often, John Ruskay has made the trek to a remote location to spend an evening, sitting in an egalitarian circle, engaging in dialogue with MI fellows, thereby demonstrating that these were important exchanges for him. That experience meant far more than the chance to ask unfiltered questions and obtain candid answers; it represented Ruskay's commitment to those in the room, a nod to the agencies that sponsored them, and caring acknowledgment that sometimes it takes undivided attention to achieve mutual understanding.

### **Institutional Collaborations**

The development of these programs requires providers such as universities or consulting firms that can deliver various components. With each of these collaborations significant staff time is required to build relationships, develop the program, and orient faculty to the realities of the Jewish nonprofit sector. These resulting efforts have sometimes positively affected and at other times challenged the providers with which we contract. Such long-term programs require sustained intense focus that can strain the capacity of providers even when they are eager to meet the agreed-upon expectations. Unexpected changes in priorities, staffing, or budgets can also derail the relationship. And sometimes expectations and realities do not always match. Over the years, the faculty members have developed an expertise in the New York Jewish communal enterprise, providing a valuable new resource for the entire sector. The challenge for our field is how we can collectively mine the benefit of these relationships so that they are not fleeting.

### **Learning Partnerships**

The formation of mentoring relationships with more experienced professionals in the field has proven to be essential to ensuring participants' development. Many participants, however, lack the skills or contacts needed to network or develop meaningful learning partnerships. The Muehlstein Institute therefore devotes sessions to networking skills development, opportunities to practice those skills, and then guidance in the selection of a learning partner. One participant remarked of her mentor, "Her mentorship proved crucial for me as I experienced one of the greatest transitions in my personal and professional life. Aside from providing me with advice, a sounding board, and cups of tea, the most important thing she provided for me was support and a cheerleader." Another participant added, "My mentor pushed me to look for recurring themes in organizational problems and suggest how I could better match my vision and talents to create solutions." In other programs, including the IDSM, coaches are used to provide intense focused feedback, with positive results.

### **Retreats and Overseas Experiences**

Examining one's personal leadership style and learning how to articulate a vision and purpose are not easily accomplished through classroom activity alone. Extracting participants from their daily work pressures and home obligations creates an environment that supports honest reflection. Overnight retreats provide

an opportunity for intense study, negotiating Shabbat together, informal bonding, and extensive exploration of self and values.

Changing environments, shifting perspectives, and breaking paradigms all enhance the learning experience. Although retreat settings serve to create an enriched learning climate, leaving the country to explore Jewish communities abroad has even greater impact. The overseas seminar was a living laboratory through which fellows studied definitions of Jewish peoplehood, experienced the power of collective Jewish responsibility, and confronted issues facing the Jewish people.<sup>6</sup> “On the overseas seminar, we questioned, we debated, we grappled, and we wept. We were never passive onlookers,” said one participant.

### **Life-Cycle Events and Participant Transitions**

The learning environment can be simultaneously enriched and complicated by life-cycle moments and changing environments. During the course of the professional development programs, many participants made significant personal or work-related transitions: babies were born and invited into the classroom, allowances made for attending to family crisis, new job situations were accommodated. All of these factors “shook” the learning foundation. The way in which these life-cycle passages and professional challenges are handled becomes a teachable moment to reflect the values of our community.

### **LESSONS LEARNED: WHAT CONTINUES TO CHALLENGE US**

The following challenges represent part of the ongoing agenda for this work. Addressing them will advance the success of future programs.

#### **Resistance**

Resistance to extensive professional development programs surfaces from many sources. Even as they offer words of support, some supervisors are reluctant to provide release time. Agencies do not want to spend the necessary funds. Executive leadership fails to see the benefit to the agency. Fears emerge that the professional will leave and use his or her new-found skills to benefit other organizations. Sometimes participants themselves become the barrier to their own learning, when they fail to engage fully in the experience. Finally, participants have also reported feeling resentment and jealousy from colleagues in sponsoring organizations that fail to provide context or support. Some even refrain from sharing newly acquired tools or sharpened vision for fear that their pursuit of change or advancement will be a burden to existing leadership or be viewed negatively.

#### **High Cost of Learning Jewishly**

This challenge is the proverbial elephant in the room—particularly in today’s economic climate. High-quality professional development programs are big ticket items, and the most impactful components of the program are often the most costly. In New York, we have been blessed with visionary funders, and yet we have not succeeded in developing a sustained source of funding for this

<sup>6</sup>The location of the overseas seminar changes with each cycle. The third cohort traveled to Odessa and Israel.

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critical work. Despite all its successes, the Muehlstein Institute is on hiatus, pending the securing of further funding.

### **Institutional Versus Individual Change**

One of the questions that we continually examine is, How do we reinforce the individual change taking place in participants so that there is a higher chance of influencing institutional change? That institutional change is more likely to occur if an effort is made to reach beyond program participants, particularly those who operate below executive-level management. We have pursued the following strategies in an attempt to reinforce that change: seminars for participants' supervisors (not successful), public presentations on learning projects (more so), and inclusion of key agency influentials in actual program sessions (results not yet certain).

For example, we know that the supervisor is a pivotal figure for the early-career professional and the one most likely to encourage or block efforts by participants to effect change. We attempted to engage supervisors by offering sessions on supervising early-career professionals, inviting them to participate in a "sample class," and sending them class materials. Our sense was that these efforts were often too little, too late and that outside factors such as high supervisor turnover and workloads were a strong deterrent to engagement. Going forward, we will explore the development of a parallel track for supervisors.

### **Curricular and Design Tensions**

Several key tensions affect the development of curriculum for these programs. The first is calibrating the correct balance between management and leadership content. The default in many programs seems to lean toward management content, and agency sponsors are eager for these skills to be sharpened. However, it is often the leadership content that is transformative for participants and ultimately will be transformative for the Jewish community. Both are essential.

The second is providing a Jewish context—an understanding of Jewish history, values, and current communal priorities—and the degree to which this content can be integrated with or taught side-by-side with the rest of the content. Depending upon the program and the diversity of the cohort, integrating Jewish content is a continual challenge. This is also the case regarding efforts to deepen Jewish knowledge and experiences for those for whom it is lacking. Finding the right balance is an art, not a science. When it is done successfully, the effect is striking.

The third tension relates to the various generational differences in learning styles, which not every educator is able to accommodate. Most programs do include experiential and classroom components, but some lean too heavily on frontal presentations. Many emerging leaders learn best in less formal environments, and the challenge is to more successfully balance these methodologies so that all learning is deepened and each experience is valued by participants.

Fourth, the focus on career management and self-reflection leads some participants to move more quickly than is desirable for the learning process; they focus on "what is coming next" rather than applying learning to their current work environment. Finally, the majority of these programs educate participants to exercise leadership and become agents of change. These efforts can both transform work environments and create friction within them. Ongoing support

is required to prevent demoralization of participants when their change efforts are rebuffed.

### **Developing a Field of Knowledge**

Those who provide for the professional development needs of our field are often operating without a network of collegial support. Despite an increase in the number of professional development programs, there has continued to be a sense of isolation among those who plan them. Thus, in 2006, the Wiener Educational Center convened an international professional development consultation in collaboration with the American Jewish Joint Distribution Committee, Hillel: The Foundation for Jewish Campus Life, Jewish Community Centers of North America, Jewish Funds for Justice, and United Jewish Communities. More recently a U.S.-based professional development task force was formed to further these types of conversations.<sup>7</sup> The value of sharing joint learning, resources, and experiences cannot be emphasized enough.

### **CONCLUSION**

The factors discussed here all play a critical role in the success and sustainability of long-term professional development programs. Although these interventions are not panaceas for resolving all the organizational stumbling blocks that the programs are designed to address, the benefits are evident. Increased competence, deeper self-awareness, heightened leadership, greater familiarity with challenges facing the global Jewish community, and a stronger connection to Jewish communal sector can position one for greater achievement or advancement.

Furthermore, these programs have an impact well beyond the individual and the institution. Community is woven, collaborations are inspired, understanding is cultivated, alliances are formed, assumptions are challenged, commitments are deepened, passions are fueled, boundaries are broken, respect is established, and change ensues.

Most communities “have no systemic continuing education program for training future leaders” (Dobbs, Tobin, & Hymowitz, 2004), and they are short-changing communal resources. Where professional development opportunities do exist and staff are *not* encouraged to participate, a stagnant environment persists.

UJA-Federation of New York joins with those other institutions that value this work. In these communities the stage has been set for the “singers and dancers to flourish.” The future of the Jewish community depends upon others joining in. Let the productions begin.

### **ACKNOWLEDGMENTS**

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<sup>7</sup>Although this group is still in formation, it includes professional development colleagues from Baltimore, Palm Beach, New York, Cleveland, Washington, and St. Louis.

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