

THE CHALLENGE OF SUPERVISORY MANAGEMENT IN JEWISH FEDERATIONS

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... supervisors can affect the quality of work life through three major interpersonal processes: (1) consideration—understanding, fair and humane treatment of staff along with the psychological support needed to make job tensions endurable; (2) facilitation—providing direction and information so that work effort is not wasted; and (3) participation—ongoing staff as a team in order to encourage participatory decision-making.

Supervising staff in the hectic and stressful environment of a fund-raising and fund-allocating organization is a significant managerial challenge. The purpose of this analysis is to identify the major factors which contribute to the challenge, define the aspects of supervisory management relevant to supervising staff in such an environment, and identify the leadership roles required.¹

DEFINING THE CHALLENGE

Understanding the hectic and stressful environment requires a special appreciation of the values and aspirations of the American Jewish community. Without developing a comprehensive picture of the changing nature of the Jewish community, which is clearly beyond the scope of this analysis, it is important to briefly describe the partnership between lay leaders and professionals. This partnership in fund-raising and fund-allocating is truly a unique phenomenon in American communities. It is based on a shared vision of Jewish continuity in this country and abroad. It is

directly affected by a set of values which serve to guide the partnership. They range from a shared definition of community to themes of consensus-building and interdependence.² The continuous process of clarifying these shared values directly affects the partnership between professionals and lay leaders. Different interpretations of the shared values combined with the diversity of personalities attracted to the field contribute directly to the stress and pace of Federation life.

Out of an array of issues, seven have been identified in order to increase an understanding of how the environment of Federations influences effective supervisory management. They include: (1) the task of getting the work completed takes precedence over the process of fostering effective communications and teamwork, (2) the job pressures which preclude time for supervisory conferences, (3) priority-setting is difficult when little attention is given to operational planning, (4) uncertainty about priorities leads to feelings of exploitation, (5) highly politicized organizations with fears about offending lay leaders require skills in negotiating differences as well as skills in effectively

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1. Micheal J. Austin, *No Secrets: A Casebook of Jewish Federation Management Issues*. New York: Council of Jewish Federations, 1985.

2. Philip Bernstein, *To Dwell in Unity: The Jewish Federation Movement in America Since 1960*. Philadelphia: The Jewish Publication Society of America, 1983.

FIGURE 1. Federation Realities

Reality #1—Task at the expense of process

The frenetic climate and pace of Federation work as perceived by staff appears to create a task-oriented environment where it is difficult to foster teamwork as well as develop effective supervisor-supervisee relationships. Relationships are maintained to get the work done but rarely are they developed to promote thorough performance evaluation and career development.

Reality #2—Not enough time

With extensive use of early morning and evening meetings, many Federation staff find themselves working 50 and 60 hours per week and the biggest loser in the time crunch appears to be the regularly scheduled supervisory conference. Without time to explore issues related to setting realistic goals, working on relationships with support and professional staff, and managing lay-professional relations, supervisors and supervisee fail to develop the necessary problem-solving skills needed for using job descriptions along with annual performance evaluations.

Reality #3—Inadequate Priority-Setting

While many Federations engage in some form of campaign planning and allocations planning, little attention is given to the operational plans needed for specific units of staff or for individual staff members. Without strategic planning for the entire organization and operational planning at the unit level, it is no wonder that priority setting rarely exists and staff feel frustrated by "shifting marching orders".

Reality #4—High Job Performance Expectations

Staff are expected to "do more with less" in order to keep administrative costs down and maximize the impact of the donated dollar. These expectations often lead to frustration in the absence of career ladders, clearly stated salary schedules, a system for recruiting competent staff, or a mechanism for conducting exit interviews. When high performance expectations and shifting priorities are combined with minimal salary increases and/or limited staff development opportunities, it is not surprising that loyal staff feel exploited.

Reality #5—Organizational Politics

The organizational problems range from hiring men at salaries higher than women for the same work to the challenge of dealing with demanding lay leaders. Staff need assistance in negotiating the political forces at work in all organizations, especially managing organizational change and conflict.

Reality #6—Limited Staff Development Programs

The absence of regularly scheduled, local staff development programs can contribute significantly to organizational problems. Staff frequently need assistance with career counseling and planning, time management, stress management, interdepartmental communications, opportunities for collegial support and recognition, and professional growth. There is a growing recognition that staff need to improve their skills in both giving and receiving effective staff supervision.

Reality #7—Lay-Professional Relations

Fostering the shared ownership of Federations between lay leaders and professionals has become an increasingly complex issue, especially when the lay-professional partnership has not been adequately defined. It is common to hear from staff that lay leaders are either too removed from the partnership and fail to involve other lay leaders or overly invested in the partnership resulting in "micro-managing" administrative details which are best left in the hands of the professionals. In addition, there is usually inadequate lay involvement in addressing such personnel management issues as staff recruitment and retention, adequacy of staffing patterns, salary schedules, employee benefit packages, personnel policies and procedures, and staff development programming.

utilizing supervision, (6) the lack of regularly scheduled staff development programs contributes to staff frustration in learning how to deal with constant change, and (7) the changing nature of the lay-professional partnership as it affects Federation personnel. Each of these realities is defined in Figure 1.

DEFINING SUPERVISORY MANAGEMENT

For purposes of this analysis, supervisory management is defined in terms of the specific knowledge and skill components needed to facilitate the work of subordinates. The knowledge areas include the transition into the supervisory role, the determination of one's leadership style, and the capacity to manage time and stress.³ The skill component involve the capacity to analyze the work of Federation staff, the ability to monitor staff performance, the competencies needed to manage work flow, and the diagnostic abilities to assess and educate staff.⁴

BEGINNING WITH SELF

Knowledge of self is a critical aspect of supervisory management. Most professionals were thrust into supervisory positions based on the quality of their performance at a lower level in the organization. As a result, few have had the time or educational preparation to feel knowledgeable and skillful as a supervisor. Most staff have either developed their supervisory management capacities as a result of studying an effective role model or acquiring a long list of experiences related to "what not to do as a supervisor." Whatever the background, most supervisors have made the transition from campaign associate or

planning associate to supervisor or from supervisor to department director. There are many factors which emerge in this transition.⁵ The most important aspect appears to be the degree to which one is able to let go of the previous role and assume the full identity of the supervisor. This transition takes time for the individual to acclimate fully to the supervisory role, especially relying on others to carry out the work of the unit and resisting the temptation to do for others. Supervising staff involves acquiring a new organizational role which is heavily influenced by those higher up the chain of command in the organization, by the nature of the interpersonal relations between the supervisor and the subordinate, and by the personal factors which the supervisor and the supervisee bring to the relationship.⁶

JOB PRESSURES AND JOB DESIGN

In the absence of clear organizational priorities, supervisory personnel must find ways to help staff deal with the ambiguities of organizational life. One approach to this challenge involves analyzing the nature of Federation work as it is being carried out on a day-to-day basis. This analysis involves job design and performance evaluation. In order to assist staff in developing some order out of the high pressure Federation environment, supervisors would benefit from acquiring the knowledge and skills related to developing task-based job descriptions.⁷ Given the current state of either poorly developed job descriptions or the total lack of job descriptions in many Federations, job design and updating can become a critical aspect of improving supervisory management practices in Federations. Figure 2

3. Michael J. Austin, *Supervisory Management for the Human Services*. Englewood Cliffs, NJ: Prentice-Hall, 1981.

4. Michael J. Austin, Peter J. Pecora and Diane Brannon, *Managing Staff Development Programs in Human Service Agencies*. Chicago: Nelson-Hall, 1984.

5. Austin, *Supervisory Management*, *op. cit.*

6. Austin, Michael J. *Professionals and Paraprofessionals*. New York: Human Sciences Press, 1978.

7. Peter J. Pecora and Michael J. Austin, *Managing Human Service Personnel*, Newbury Park, CA: Sage Publications, 1987.

FIGURE 2. Sample Job Description

Title: Campaign Associate

Definition of Position

This entry level position includes responsibilities for fund-raising and creating a stronger sense of community among Jews in the following professional/business and industry groupings: Real Estate and Construction, General Merchandising and Academia. Also responsible for identifying and soliciting key Jewish individuals who have the capacity to make significant increases in their yearly contributions. Responsibility includes supervision of other professional staff handling segments of the campaign. Performs other tasks as assigned and works under the supervision of an Assistant Campaign Director.

Major Responsibilities and Related Tasks

I. *Campaign Planning* (30%)

1. Analyze past campaign functioning by reviewing written materials and talking with lay leaders and staff in order to determine strengths, areas for improvement, and future needed changes.
2. Solicit new options and integrate with creative thinking about future campaigns in order to contribute ideas and new approaches to further the campaign's effectiveness.
3. Develop written objectives to be accomplished and related operational plans in order to have an overall plan to present to leadership.
4. Develop a plan to involve lay leaders in contributing to campaign objectives and forecasts with assumptions in order to maximize lay involvement in campaign implementation.
5. Develop a comprehensive operational campaign plan in consultation with lay leaders (timeline, staff roles, lay leader roles) in order to enlist the support of staff and lay leadership for the upcoming campaign.
6. Develop a long-term campaign plan (3-5 years) for each area of responsibility in order to integrate it with the long-range plan of the Campaign Department.

II. *Campaign Implementation—Lay Leadership Involvement* (30%)

7. Develop a strategy to cultivate lay leadership involvement in the campaign plan in order that their ideas about involving other lay leaders can be integrated into a unified plan and that they develop a sense of ownership and responsibility for their campaign.
8. Recruit a Chairperson and Associate Chairpersons for the campaign in order to build a leadership structure and leadership succession plan needed to implement the campaign plan.
9. Assist lay leaders in recruiting, screening, and deploying campaign workers in order to build a campaign organization.
10. Plan meetings between Associate Chairpersons and the Chairperson in order that the Chairperson can present the plan, enlist support for the plan, and foster lay leadership teamwork.
11. Coordinate the "rating" assignment, the allocation of solicitation responsibilities, and the re-assignment and resolicitation in a planned manner in order to maximize the fund-raising potential.
12. Organize events of large groups of people in order to educate, fund-raise, and encourage participation in the campaign.
13. Coordinate follow-up of assignments (update meetings, reminder calls and letters, and reports) in order that to maintain lay and staff morale needed to complete the campaign.

III. *Campaign Implementation—Research* (20%)

14. Analyze the array of campaign assignments in order to develop job descriptions for use by lay leadership.
15. Research information regarding prospects as well as current contributors' economic situation, geographic location, denomination, etc., in order to provide lay leaders and staff with the data to "rate", "assign", and "solicit".
16. Provide information regarding campaign, Israel, and community needs to lay leadership and staff in order to develop momentum and enthusiasm for the campaign.
17. Monitor solicitations in terms of problems, errors, delinquents, and special situations in order to maintain client satisfaction.

FIGURE 2. Sample Job Description (Continued)

18. Assess lay leadership capacities beyond campaign in order to make referrals to the Human Resource Development program for cultivation (e.g. serving on committees or boards).
19. Evaluate each campaign event as well as the fund-raising goal in order to provide the data for assessing the overall campaign effort in relationship to the organization's mission.
20. Monitor unexpected factors influencing the campaign in order to develop strategies with lay leaders to maintain campaign momentum.

IV. *Coordination (20%)*

21. Coordinate staff (full-time and part-time from other departments) in order to coordinate a "team" effort and maximize objectives.
22. Educate staff and train solicitors with the assistance of lay leaders in order to increase knowledge about and productive outcome of the campaign.
23. Participate actively in departmental and Federation staff meetings in order to coordinate efforts within and between departments.
24. Develop effective communications with other departments (Endowment, Public Relations, Planning and Allocations, Missions, and Finance) in order to assist them in carrying out their responsibilities and to gain their support for the campaign.
25. Develop a system of recognition and rewards in order to publicly acknowledge the contributions of both lay leadership and staff.
26. Participate in the Federation's staff development program in order to educate new staff (support and professional) about the annual campaign.
27. Develop a program budget for the campaign areas of responsibility in order to integrate it with the budget for the Campaign Department.
28. Maintain correspondence with lay leaders (birthdays, wedding anniversaries, births, deaths, illness, etc.) in order to enhance lay-professional relationship-building.

Education and Experience

The minimum education and experience requirement for this entry-level position is a Bachelor's degree from an accredited college or university and two years of experience in fund-raising. A Masters degree in Social Work, Public Administration, or a related discipline may be substituted for the two years of experience. An educational or experiential background in Judaica would be very beneficial. This position requires skills in effective written and oral communications, events planning and evaluation, prospect research, effective collegial relationship-building, capacities to build and refine effective lay-professional relations, and the full-range of community organizing knowledge and skills.

details a sample of a task-based job description for an entry-level campaign position.

The design of task-based job descriptions involves the up-front investment of time and thinking by both supervisors and supervisee. The process includes the following: (1) specifying the major responsibility areas of the position, (2) weighing each area in order to add up to 100%, and (3) specifying task statements related to each responsibility area. This collaborative effort between the supervisor

and the supervisee can improve staff morale as a result of the increased clarity of expectations and the shared appreciation for the breadth and depth of the job itself.

The task-based job description also serves as the foundation for the development of a performance evaluation instrument. Such instruments are either totally lacking in most Federations or are so general as to be useless in providing feedback on job performance. Using a task-based job description, it is possible to develop an instrument which includes

behaviorally-anchored rating scales.⁸ These scales seek to clarify the criteria to be used in assessing how well any given task has been performed. Such an instrument, designed collaboratively between the supervisor and supervisee, can increase the commitment of both parties to engage in an open, constructive annual review. Ideally, the supervisor and supervisee annually complete the assessment instrument independently and then sit together to review the items to see where they agreed and disagreed. Clearly, the supervisor makes the final judgment along with the full and complete input from the supervisee.

HIGH EXPECTATIONS AND MANAGING UP

While most attention given to supervisory management in the management sciences relates to supervising down with regard to subordinates, the process of managing up refers to the need to focus on "helping the boss do good." In essence, it involves the communication upward of organizational concerns in order to balance high performance expectations with the realities of organizational life. Top management is frequently unaware that their efforts to help the staff pursue important goals may include negative interpersonal processes as intimidating staff, passing stress down through the organization, accruing rather than sharing power, and closing off rather than promoting open communications. Many of these negative processes can be reduced by implementing the following components of "managing up":

1. Advocating for the needs of subordinates in relationship to career development, meritorious performance, environmental needs such as space to work, and social needs in terms of work climate.
2. Influencing agency policy by proposing changes in the way in which the

organization functions (e.g., travel policies, campaign procedures, personnel policies, etc.).

3. Influencing agency program development by proposing new program directions and identifying implementation strategies.

4. Influencing agency leadership and providing constructive feedback by analyzing
 - a. the organizational climate with respect to improving inter-unit communications and team-building.

- b. the impact of the executive's management style and actions on staff.

- c. the need for recognition of outstanding staff work.

- d. the changing nature of work life in order to foster maximum creativity and participation.

5. Enhancing top management's capacity to receive and utilize input from middle managers who seek to manage up and enhance middle managers' capacity to view the managing up process as enhancing their career development.

The managing up process requires supervisors to be clear about their own managerial needs as well as those of their superiors. Those needs can be identified through individual self assessment⁹ as well as through perception checking resulting from consulting a trusted colleague or participating in a support group.¹⁰ If the managing up process is seen as valuable in carrying out supervisory management responsibilities, then the relevant tasks and percentage of time should be incorporated in a revised job description. Spending 10-20% of one's time managing up may be the key ingredient in minimizing the negative impact on staff of unrealistic performance expectations held by top management.

9. Eugene T. Gendlin, *Focusing*. New York: Bantam Books, 1981.

10. Howard Kirschenbaum and Barbara Glaser, *Developing Support Groups: A Manual for Facilitators and Participants*. La Jolla, CA: University Associates, 1978.

8. *Ibid.*

NEGOTIATING THROUGH THE WEB OF ORGANIZATIONAL POLITICS

One approach to dealing with the reality of organizational politics is to take a closer look at the process of negotiating.¹¹ Recent research on the negotiating process inside and between organizations¹² can help staff deal with differences between themselves, with the boss, or with lay leaders, where it is frequently assumed that the only choices for a negotiated solution involve hard-line or soft-line bargaining positions adversarial negotiations or avoidance of the negotiation process. Avoidance is one of the common features of Federation life, either avoiding open dialogue between lay leaders and professionals or avoiding issues between staff. In Figure 3, Fisher and Ury (1981) refer to the hard-line and soft-line approaches as positional bargaining and found that an alternative approach of principled negotiating could lead to far more successful results.

STAFF DEVELOPMENT PLANNING

It is interesting to note that organizations will invest resources in the maintenance of computers and other equipment but neglect to devote similar resources to maintenance, growth, and development of staff.¹³ Supervisory personnel often want to assist with the development of both professional and support staff. The challenge for supervisors is to acquire the skills to accurately assess and to educate staff. In addition to using the data from annual performance evaluations, it is important to schedule career conferences which are separate and different from annual performance reviews. Since most staff have difficulty focusing on both past job

performance feedback and future career planning in one session, it is usually more effective to conduct the two discussions at different times of the year. Assessing the educational needs of staff should be a participatory process using learning needs emerging from prior performance evaluations. These learning needs should be linked to the different learning opportunities within the Federations as well as the career-oriented learning available from regional and national training programs. It is important not to overlook the array of learning opportunities *within* each Federation where campaign staff can acquire new knowledge and skills in the planning department and the planning staff can do likewise in the campaign department. Important learning from job rotation experiences can also be gained in such areas as endowment, public relations, finance, and public policy or community relations.

The staff development component of effective supervisory management includes at least three functions: orienting, updating, and upgrading.¹⁴ Orienting new staff, both professional and support, includes reviewing job descriptions and performance criteria, introductions to lay leaders, and reviewing mission, history and personnel policies of the Federation. Updating staff is usually carried out through regularly scheduled staff meetings where staff are kept posted on developments in their own department, in other departments, and in the local, national, and international communities. Supervisors who promote staff participation also involve the staff in sharing information from their own experience as a way to update all staff. Again, for updating to be effective, it needs to be part of staff meeting agendas or other regularly scheduled meetings.

In the process of upgrading staff, the supervisor needs to distinguish carefully between the general upgrading of all staff regarding new approaches to Federation

11. Philip R. Popple, "Negotiation: A Critical Skill for Social Work Administrators", *Administration in Social Work*, Vol. 8, No. 2, 1984.

12. Roger Fisher and William Ury, *Getting To Yes*. Boston: Houghton, 1981.

13. Austin, Pecora and Brannon, *op. cit.*

14. Austin, *Supervisory Management*, *op. cit.*

FIGURE 3. Negotiating

Problem		Solution
Positional bargaining: Which Game Should You Play?		Principled Negotiating: Change the Game by Negotiating on the Merits.
Soft	Hard	Principled
Participants are friends.	Participants are adversaries.	Participants are problem-solvers.
The goal is agreement.	The goal is victory.	The goal is a wise outcome reached efficiently and amicably.
Make concessions to cultivate the relationship.	Demand concessions as a condition of the relationship.	Separate the people from the problem.
Be soft on the people and the problem.	Be hard on the problem and the people.	Be soft on the the people, hard on the problem.
Trust others.	Distrust others.	Proceed independent of trust.
Change your position easily.	Dig into your position.	Focus on interests, not positions.
Make offers.	Make threats.	Explore interests.
Disclose your bottom line.	Mislead as to your a bottom line.	Avoid having a bottom line.
Accept one-sided losses to reach agreement.	Demand one-sided gains as the price of agreement.	Invent options for mutual gain.
Search for the single answer: the one <i>they</i> will accept.	Search for the single answer: the one you will accept.	Develop multiple options to choose from: decide later.
Insist on agreement.	Insist on your position.	Insist on objective criteria.
Try to avoid a contest of will.	Try to win a contest of will.	Try to reach a result based on standards independent of will.
Yield to pressure.	Apply pressure.	Reason and be open to reasons; yield to principle, not pressure.

*Roger Fisher and William Ury, *Getting To Yes*, Boston, MA: Houghton, 1981.

management and the specific upgrading needs of individual staff members. Since experienced staff will usually have learning needs very different from those of the newcomer, individualized learning contracts for each staff member should be developed based on shared discussions and planning.

THE SELF-EVALUATING SUPERVISOR

With the previous supervisory management strategies in mind, it is also important to identify some of the specific challenges which supervisors may confront in developing their own sense of competence in supervisory practice. As Strauss notes,

supervisors can affect the quality of work life through three major interpersonal processes: (1) *consideration*—understanding, fair and humane treatment of staff along with the psychological support needed to make job tensions endurable; (2) *facilitation*—providing direction and information so that work effort is not wasted; and (3) *participation*—organizing staff as a team in order to encourage participatory decision-making.¹⁵

15. George Strauss, "Management Practices", *Improving Life At Work: Behavioral Science Approaches to Organizational Change*, in J. Richard Hackman and J. Lloyd Suttle, Santa Monica, CA: Goodyear Publishing, 1977.

It is important to identify the key components of the three functions of consideration, facilitation, and participation. The components related to *consideration* include: (1) creating a feeling of approval, (2) developing personal relations, (3) providing fair treatment, and (4) enforcing rules equitably. The components related to *facilitation* involves the process of giving adequate help and assistance to staff as well as demonstrating competence as a technically proficient supervisor. The facilitation function includes a heavy emphasis on the fair use of performance standards. The third function of *participation* relates to promoting worker autonomy, promoting job enrichment, and not supervising too closely. Participation is defined as a supervisory management style which involves staff in making or influencing decisions about matters related to their work.

It is important to note that the functions of consideration, facilitation, and participation interact with one another in contributing to staff satisfaction and productivity. The self-evaluating supervisor also needs to pay attention to relations with superiors, peers, lay leaders, and other agency representatives in the community. In addition, one's own supervisory effectiveness may be directly related to the supervisory style of the supervisor's superior. Supervisors who receive either general or close supervision might tend to reflect either form of supervision in overseeing the work of their own staff. Analyzing daily practice as a self-evaluating practitioner is one method of measuring one's progress toward the goal

of providing competent supervision to staff.

CONCLUSION

This analysis of supervisory management in Federations began with the identification of seven major realities which challenge Federation staff. These challenges were assessed in terms of supervisory management practices which could help to deal with each of the realities. These practices included job design and performance evaluations, managing up, principled negotiating, staff development planning, and the role of the self-evaluating supervisor.

It is clear that all Federation managers would benefit if they built into their daily management practice a range of supervisory management functions. With supervisory management practices in place, Federation managers will be in a better position to promote annual organizational self-assessment whereby all staff and lay leaders contribute to evaluating the Federation. The capacity to engage in organizational self-assessment is a sign of strength. Strong organizations utilize outside consultants and/or internal staff committees to regularly assess their organizational structures and processes.

Developing a future vision of the Federation and positioning it in an increasingly competitive fund-raising environment requires a well-managed staff. Federations are only as effective as the quality of supervisory management and the quality of the partnership between lay leaders and professionals.