

Ch-ch-ch-ch-Changes

e ejewishphilanthropy.com/ch-ch-ch-ch-changes/

eJP

By Shoshana Dweck
and James A. Cohen

A quick Internet search easily unearths maxims telling us that change is inevitable and challenges strengthen us. We are the first to admit that we were lucky to have taken on our roles as Federation president and Federation C.E.O. in an intermediate community that had three extraordinary attributes: the community was not only ready for change, it was demanding change; the lay leaders were willing to do the hard work of making those changes; and (most of) the



community wanted us to succeed. We did not have the luxury of fearing change or kvetching about change or postponing change. We were given the mandate to make change from day one. One of the themes of President Obama's recent State of the Union Address was to encourage movement beyond the mentality of malaise. From the President's perspective, the time has come to accentuate the positive and make today the beginning of the next phase of American renewal. Regardless of one's opinion of Mr. Obama's political views, we firmly believe that adapting and adopting this outlook is not only in the Federation system's interest, but, accepts the reality that failing to do so will relegate us the margins.

Simon Sinek turned the ordinary world upside down by with his counter-intuitive perception that to bring people into your world, you need to start with your WHY. In his famous "[The Golden Circle](#)" TED Talk, Sinek differentiates among the WHY, HOW and WHAT of an organization, describing the "WHY" as "your purpose, your cause, your belief." The history of Jewish communal philanthropic "hows" and "whats" is a history of change and adaptation. *Tzedakah* in the 40 years our people wandered in the desert had its own approach. *Tzedakah* in the years of the First and Second Temple, *Tzedakah* during the years of dispersion, *Tzedakah* in the *shtetl*, and *Tzedakah* in the New World each had different hows and whats, appropriate to their times. But we think our real insight was the recognition that the WHY remained essentially the same. Throughout Jewish history we have known that we are better when we act together; centralized philanthropy supported willingly and with shared values at the grass roots level, is essential to our survival on both the individual and the communal level. After all, you can't give truly anonymous and meaningful *tzedakah* in any effective way if there is no communal infrastructure for that. Such a "WHY" impacts on the way Jews confront our world and helps define our role in that world.

We knew we needed to change two aspects of our personal mindsets, and we needed to bring the Board and Agencies along with us, before we could bring our new approach to the community. First, we needed to embrace the Federation WHY, fully and completely. We started by asking our Board to get back in touch with their personal Federation WHYS, the words they use to describe Federation. They told us: Collaboration. History. Israel. Continuity. Inspiration. Community. Missions. Engagement. Family. Facilitate. Leadership. We took all of those words, and the image of Federation as always being the table around

which the community can come together, and we developed our tag line: “Better Together.” We realized that the words were all about impact, so we stopped talking about the campaign as the goal, and started focusing on the impact we can have together, in our community and around the world.

Once we embraced the Federation WHY, it was time for the second, and most important, mindset change. We had to stop thinking that just because we needed new WHATs and HOWs, that there was something wrong with the WHYs or with the system. We had to teach ourselves to embrace the opportunity to change. It wasn’t the fault of our donors, of our staff, of our volunteers, of our agencies. It didn’t have to be anyone’s fault. The need for change didn’t imply that something had gone wrong, but just that the worlds of secular and Jewish philanthropy are undergoing tectonic changes.

Perhaps the biggest change we undertook was one of attitude. For our Federation to be treated as the table at which everyone could sit, we had to walk the walk. The first step after changing our tagline to “Better Together” was pure marketing: the clarion call announcing a new day had arrived. The proof of the pudding was to begin providing expanded and targeted services to the organizations in the community, simply because it was the right thing to do and because Federation was the only logical provider of such services. We introduced grant writing workshops free of charge to all of our partners (even to those to which we do not allocate) and began a legacy program to assist our partners in their pursuit of aspirational planned-giving goals.

Perhaps the best proof of the change pudding was the Shabbat Across Stamford evening held on March 13th. Working in tandem with the Stamford Board of Rabbis, our Federation organized the only Shabbat across America event on the North American continent at which all of the synagogues of the community participated together. This could not have happened two or three years ago. But we and our increasingly enthusiastic partners made the community “Better Together,” so happen it did.

We also recognized that we as CEO and president, and more broadly as a local federation could conduct business in a more collaborative and professional manner. Our personal collaboration, mutual respect and support was essential as we took the risks inherent in change. On the communal level, we recently signed a collaboration agreement with our partner to the east, (then Westport-Weston-Wilton-Norwalk, now Upper Fairfield County) so that we could join forces on programming and administrative tasks. We also overhauled our governance structure, shrinking our board to a more manageable size – a challenge that was as necessary as it was fraught with challenges. To strengthen and preserve the community’s voice in our thought process, the Board established an Advisory Council, comprised of the community’s and our agencies’ lay leadership to tackle important issues of the day, together. By resisting the temptation to give time on the soapbox to the nattering nabobs of negativism who said “This isn’t how it is done”, we brought skeptics into the conversation.

The hardest decision we made was that the time for kvetching about change stops now. The new HOWs and WHATs: they all start today.

Shoshana Dweck is Immediate Past President of United Jewish Federation of Greater Stamford, New Canaan and Darien and current Vice Chair (Development) of ARZA and serves on the Board of the United Israel Appeal (NA).

James A. Cohen, a former career diplomat and university administrator, is Chief Executive Officer of United Jewish Federation of Greater Stamford, New Canaan and Darien. For more information on our Federation’s changes, as well as new models and approaches to change management, go to www.ujf.org, or you can reach us at jcohen@ujf.org or sd@ujf.org.

Part 2 will present some of the resources we used and steps we took to make the changes referenced in this article, and to keep ourselves working in harmony with each other, with our board, and with our

community.