

SHUL BUSINESS: A first-of-its-kind program at Northwestern University's acclaimed Kellogg School of Management teaches rabbis how to be a CEO

By Pauline Dubkin Yearwood
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Rabbis are spiritual leaders, teachers, writers of sermons, pastoral counselors, scholars and much more. They are also CEOs.

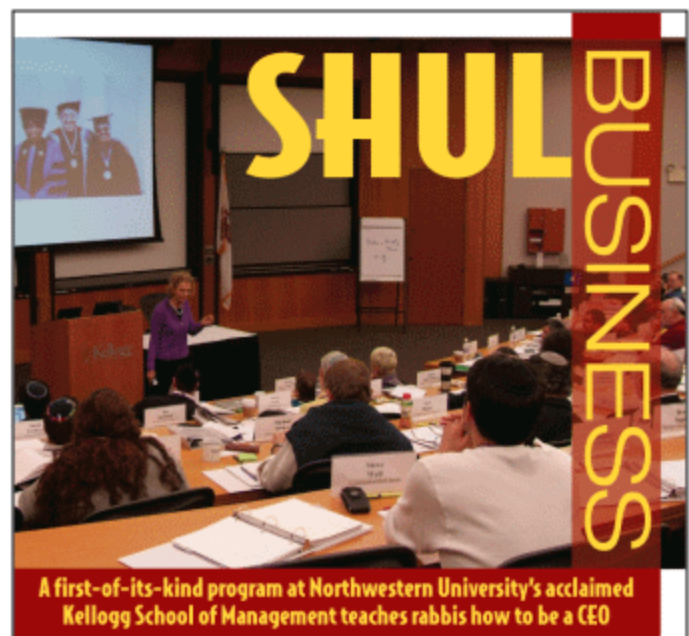
Whether they head a congregation, an organization, a school or a Hillel, most rabbis deal with the same elements as presidents of corporations do: staff, budget, payroll, future planning. In other words, management.

They don't learn these skills in seminary, but now there's a first-of-its-kind Chicago-based program designed just for them at one of the country's top-rated business schools.

The Kellogg Management Education for Jewish Leaders program - known as KJL - just "graduated" its inaugural class of rabbis and synagogue executive directors, who spent five days at Northwestern University's Kellogg School of Management taking such classes as "Marketing and Leadership," "Implementing Change," "Synagogue Governance: Whose Synagogue Is It?" and "Fundraising: Major Capital Campaigns."

The first class included 25 synagogue rabbis and 16 executive directors from eight states, Great Britain and Canada and from across the Jewish denominational world. Reform, Conservative and Orthodox rabbis, including a number of leaders of rabbinic organizations, participated.

But the first session, which took place on Kellogg's Evanston campus, was just the beginning.



The KJL program was the creation of a dynamic Chicago-area business leader and observant Jew, Dinah Jacobs. In her professional life, Jacobs worked at Citibank/Citicorp for more than 25 years and served as the corporate director of customer affairs for 17. A 1980 study she wrote is credited with pioneering the field of customer satisfaction and service quality.

At Northwestern, she worked in a volunteer capacity for more than 30 years along with her husband, Donald P. Jacobs, now dean emeritus of Kellogg, helping to strengthen and bring together the school's Jewish community. She served on the board of both the Fiedler Hillel and the Tannenbaum Chabad House, and the Shabbat dinners she and her husband hosted often drew more than 100 NU students and faculty members.

Jacobs says the idea for KJL grew out of her talks with the many rabbis she knows.



Dinah Jacobs

"They asked me, how can we learn more about management? We didn't learn this in seminary; we learned a lot on the job but we know we have more to learn," she says. Rabbis told her, "We are primarily religious leaders, teachers and pastoral counselors, yet de facto we are also in charge of major non-profits. We wear many hats."

Rabbi Michael Balinsky, the executive vice president of the Chicago Board of Rabbis and a member of the KJL Advisory Board, was one of the earliest supporters of Jacobs' plans when she discussed them during a Shabbat Kiddush at the Northwestern Hillel.

He immediately felt that such a program was needed, he said. "The task of the rabbi is varied and complex," he said recently in a phone conversation. "There are lots of elements from the business world, and Kellogg is stellar in the business world. An executive management program could help (rabbis) in their work, with boards, financial issues, issues of crisis management that come up, issues of long-term planning, staff issues, all the management issues that are associated with synagogue rabbis."

It would be valuable for rabbis to learn "how to take what's really valuable from the business world and integrate it into the synagogue to better serve the goals of the synagogue," Balinsky says. "This is a dimension of rabbinic education that is not included in rabbinical school - and it should not be - but rabbis have to deal with their own professional education, which means not only learning and Torah study but working with growing synagogues to integrate quality business knowledge into their work as well."

Balinsky offered Jacobs his help and has been actively involved in the planning process for the program.

Another Chicago rabbinic leader, Rabbi Peter Knobel, also became involved early on. Knobel, senior rabbi of Beth Emet The Free Synagogue in Evanston and president of the Central

Conference of American Rabbis, the Reform movement's rabbinic arm, also became an advisory board member, along with rabbis from California and Canada and Donald Jacobs.

"I got involved because it's very clear to me that as the synagogue evolves, as lay leadership evolves, we have to be responsive to the best practices coming out of the business world and think about how they apply to our increasingly complex institutions, especially the synagogue," Knobel said during a recent phone conversation. He cited the need to "translate those insights into Torah values."

"I was very excited when Dinah (Jacobs) approached me to work with her and others in setting up the program. Our goal was not to look at top-notch successful places and ask how this learning might enhance our institutions, and to give rabbis and executive directors a vocabulary to speak to their lay leadership," he says.

Jacobs, meanwhile, was researching the field, looking at studies and talking with rabbis and leaders of the various Jewish movements. Everything she found pointed her in the direction of what would eventually become the Kellogg program.

One study of Conservative rabbis and lay leaders, for instance, reported that leaders wanted their rabbis "to do more as fund-raisers and managers of people." A National Conference on Continuing Rabbinic Education held earlier this year showed rabbis were seeking ways "to address their lack of skills in business leadership and congregational management," and were seeking additional growth and proficiency in a number of skills, including leadership development, conflict management, "positive relationship building" and fiscal and financial management.

Soon Jacobs had come out of retirement to head the KJL program, all on a volunteer basis.

"There are moments when one understands what an opportunity has been presented," she says of that decision. "I felt this was a special opportunity because I'm deeply committed to Judaism and working for the Jewish people and I've spent my whole professional life in management," including more than 30 years at Kellogg as a "community builder."

That "ah-ha" moment occurred last spring. Things moved quickly after that. "By September, we were fully enrolled. By November, we were in the classroom," Jacobs says. Admission to the inaugural class for rabbis and executive directors was by invitation only and went out to rabbi-executive director teams. (Some rabbis participated alone since not all synagogues have executive directors.)

Participants came from England, Canada and eight U.S. states. Each paid \$2,000, which Jacobs calls "a modest price for a transformative leadership experience" and notes that corporate Kellogg programs of the same duration cost upwards of \$5,000 per participant. She realizes, though, that some future participants from smaller synagogues may not be able to afford the fee; at the inaugural class, participants "passed the kippah" and collected \$2,000 earmarked to help deserving potential students. It's the start of a formal scholarship fund, Jacobs says.

As rabbis registered for the class, Jacobs gained additional insight from the questions asked on the registration forms about key challenges and what participants were hoping to learn. Most frequently mentioned were "increasing member involvement"; "marketing know-how and effectiveness"; "fund-raising (pre-financial crisis)"; and "managing people and team building." Also cited as concerns were "synagogue governance"; "time management"; "mission and strategy"; "building community"; "volunteerism"; and "technology." The program addresses all these issues.

The classes themselves, taught by senior Kellogg faculty members, covered the broad areas of marketing and leadership; synagogue governance; fund-raising; implementing change; financial management; conflict resolution and negotiation skills; and crisis management.

Also introduced was the newly developed Synagogue Dashboard Metrics, a program by which synagogues can determine their own measures of organizational success and track them over time, a technique increasingly used in business and government circles.

For those who may feel that their rabbis are above such worldly concerns, Balinsky, for one, would like to set their fears to rest.

"Rabbis will continue to teach, to do sermons and funerals, to look after people pastorally," he says. "What a program like this can contribute is also something rabbis have always done, but it will greatly improve their skills in thinking about this. How do you set a vision of what a congregation can be? What does it mean to work with a board? How can a rabbi lead a synagogue and work efficiently so that staff at the synagogue can share a vision of what the institution should be? All of these are significant questions that congregations have to address."

By all accounts, the intensive five-day classroom program - which also included traditional prayer services and kosher meals served in a private dining room - accomplished these goals splendidly. But for some participants, the benefits went beyond the classroom sessions.

"The fact that it was interdenominational was a demonstration that there are issues that transcend denominational divisions," Rabbi Knobel says. "It was an opportunity to get to know colleagues we might not have known in other contexts. Altogether I thought it was a remarkably successful pilot project, one that inspired us to work on it again for next year." Being exposed to "many of the top-notch teachers at Kellogg" was also a plus, he says.

Rabbi Steven Lowenstein, senior rabbi of Am Shalom in Glencoe, attended the session along with Edward Alpert, the synagogue's executive director. Both found it a superlative experience.

"I thought it was a wonderful opportunity to learn with some of the greatest business people in the country and use their expertise to apply it to the nonprofit world and the synagogue world," Rabbi Lowenstein said during a recent conversation. "I realized that, while I received great training at seminary, so much of my time is spent running a synagogue, addressing issues that I didn't learn a whole lot about in rabbinic school, that this was a great opportunity to build on my knowledge."

Attending as a team with Alpert was "fabulous," he says. "The rabbi and the executive director working in a great partnership, to be able to learn with him, to look at our institution and figure out what we are doing right and where we could improve, where we could maximize our strength was a very helpful tool," he says.

Declaring himself "honored" to be part of the inaugural class, Lowenstein says the classes "were at an incredibly high level. It was great food for thought to think about leadership, persuasion, management, the kind of nuts and bolts of the synagogue, through the eyes of Kellogg, which is such an incredible resource in our community."

Alpert agrees with that assessment. "I was very excited by the concept, and it really was the kind of thing the rabbi and I felt would be valuable to attend together, to learn ideas and approaches, discuss them and hopefully utilize them in our day-to-day work," he says. "No major institution has ever undertaken this - to provide management skills for clergy and do it across denominational lines."

He says he "got a lot out of" the classes even though he felt some of it covered "basics" that executive directors were already familiar with, even if the rabbis weren't. Nevertheless, "that stuff was presented to us with new eyes, new approaches," he says. "It gave us cause to think about how we might be able to do these things better. It was very useful, very helpful."

That was particularly true since he attended with Lowenstein. "The rabbi being there made it more valuable for both him and me," he says. "I cannot begin to tell you how many times (since then) he and I look at each other in a staff meeting and reference something we've learned in the seminar. There was great value in both of us learning it together."

Rabbi Steven Mason, senior rabbi of North Shore Congregation Israel in Glencoe, who attended along with executive director Serane Blatt, found the class "extremely helpful. It gave us the opportunity to think about the rabbinate, about synagogue life in ways we ordinarily don't," he says. "Rabbis can benefit a lot by looking at how schools like Kellogg present issues like conflict resolution, problem solving and management issues. We are involved in institutions that have a particular focus and it helps to be able to fulfill our mission better."

Balinsky says that with rabbis and executive directors working together, the classes help synagogue leadership deal with such issues as "what does it mean to be the leader? To really help set the vision in concrete ways, to help people formulate, what is my role? What can I take from the business world that will help this congregation? How do I get people on board and measure our success and limitations? What does leadership in a synagogue entail? What should it entail?"

This type of knowledge can and should be used to enhance a rabbi's other functions, he says. "A rabbi who is a great business person who has little intellectual Torah content should become a business person, not a rabbi," he says. "But when a rabbi has the knowledge and is respected as a teacher, knows what to teach, what to offer spiritually, then the question becomes how to take the knowledge from the business world to become more successful, to build on the rabbinic knowledge to improve the congregation, to help it become a better place for Torah study." The

Kellogg program helps participants "reach more people, help people work together better, bring out the best in the staff," he says.

Another participant, Rabbi David Kirshner of Temple Emanu-El in Closter, N.J. even wrote a *d'var Torah* about the experience, which Jacobs distributed to other class members. In it, he echoes the experiences of many participants, rhetorically asking, "Why is a rabbi learning business skills? Rabbis are spiritual leaders, not business leaders. Actually, we are both. And, while rabbis are well versed in Jewish texts, tradition and pastoral skills, we have much to learn about governance, change management, budgets, mediation and fund-raising ... " Then he links Jacob's dream of angels ascending and descending a ladder with the need to "learn new things and make new goals ... to take the steps toward achieving those dreams."

In the midst of the kudos coming from the 2008 participants, Jacobs makes it clear that the first session was only the beginning. The initial participants started several projects, including writing for KJL's online learning site. Balinsky, along with a California-based rabbi, also began a project described as designed to "bring Judaic text into dialogue with management and leadership issues." Balinsky "is an obvious leader because of his commitment to learning and text," Jacobs says.

In addition, she says, even before the start of the inaugural (now being called the "classic") program, Kellogg received requests for six other customized programs, including one for rabbis early in their careers in preparation for becoming senior rabbis of large congregations. Jacobs says the Christian community has a "transition-into-ministry" program that is built on the medical school residency model.

"The same need clearly exists in the Jewish community," she says. "We must enable recent seminary graduates to build on their professional training to become highly skilled and effective rabbinic 'practitioners.'"

Another new KJL project is a Jewish leadership seminar geared to professional and lay leaders in synagogues and organizations, to be held on Sundays to meet the needs of working professionals.

Participants in the 2008 session also suggested a program for assistant rabbis and for synagogue board members. When Jacobs asked for nominations, more than 75 names were suggested.

Plans for the 2009 "classic" program have been finalized as well - it will take place Nov. 29-Dec. 3, 2009. (For more information on it, e-mail Jacobs at dinah-jacobs@kellogg.northwestern.edu.)

If this year's class is any indication, Jacobs says, the next one will also include what she calls a "robust Chicago contingent." Indeed, she says, the program's Chicago roots are significant.

"The initiative became global, exceeding our expectations, but at the same time, its headquarters is in Evanston. Two of our esteemed advisory board rabbis are Chicago-based. And the Chicago community has been so generous and supportive, I feel so good about doing this in Chicago," she says. "I look forward to continuing our collaboration with the Chicago Jewish leadership as we all grow from strength to strength."