

2016–2017 | 5777

URJ Scholar Series on Values-Based Leadership

A Resource and Discussion Guide to Inspire Sacred Action at Your Congregation



Foreward

The URJ Scholar Series on Leadership provides an opportunity for learning and conversation about key concepts in leadership. We recognize the challenges that congregational leaders face as they move from the mundane to the holy and from management to leadership. The Scholar Series is therefore meant to assist all leaders in navigating between their organization's overarching vision and the day-to-day needs of the community they serve. We hope that the materials in this resource will promote an open exchange of ideas among and between professionals and lay leaders in order to deepen these critical sacred partnerships.

This year's Scholar Series focuses on **values-based leadership**. In the words of Harry Kraemer, the first scholar featured in this year's series, "becoming a values-based leader isn't about emulating a role model or a historic figure. Rather, your leadership must be rooted in who you are and what matters most to you... When you truly know yourself and what you stand for, it is much easier to know what to do in any situation."

As you use the materials in this resource, you will notice the following overarching concepts:

Big Ideas

- Values are the foundation of sacred leadership.
- "When you truly know yourself and what you stand for, it is much easier to know what to do in any situation." (*Harry Kraemer*)
- Our Jewish sacred texts are rich with teachings that shape our values and guide our leadership.

Essential Questions

- What are the values that guide me as a leader?
- How do I stay true to my values?
- How do I respond when circumstances challenge my values?
- How do values shape sacred leadership?

The 2016-2017 Scholar Series features three exemplary teachers, each providing a unique lens into the understanding of values-based leadership:

- Harry Kraemer—Focuses on four principles of values-based leadership.
- Dr. Erica Brown—Uses a text-based approach to help leaders understand the importance of learning to say no and to really mean it when they say yes.
- Alan Morinis—Shares how the practice of Mussar, the Jewish tradition of personal and spiritual growth, can enhance leadership skills.

Given the focus on this year's topic, we have included a fourth section on "personal Torah of leadership." Personal Torah of leadership is a set of core values that guides an individual's actions in leadership and daily life. Articulating your personal Torah of leadership through the framework of our sacred Jewish texts will help you to find the holy in your work and the purpose in your actions. While your personal Torah of leadership may evolve over the course of your Jewish journey, it will continue to guide you throughout your congregational leadership. The personal Torah of leadership study guides are intended for reflection on the individual and group values that you bring to your leadership. We recommend that, if you do several sessions from this series, the guide about personal Torah of leadership should be the last one.

All three scholar sessions are presented here in their entirety and are also accompanied by several resources developed especially for congregational leaders. These companion pieces are designed to provide a framework for ongoing conversations and learning around these topics.

For each scholar and topic, we have provided:

1. The full recording of the learning session that can be used for either a pre- or post-assignment
2. An article written by the scholar on their specific topic
3. Two responses to the learning by congregational presidents
4. Study guides featuring the various resources, which can be used with your:
 - Board of trustees
 - Executive committee
 - Professional staff
 - Executive committee and professional staff
 - Committee and/or task force

Please note that the personal Torah of leadership section only includes study guides, not sections based on the scholars' teachings.

There are different ways in which to use these resources: as the opening learning for your board meeting or to encourage the executive committee and senior staff to meet and discuss some larger leadership goals. These activities help congregational leaders explore the essential questions in personal ways. The Scholar Series is designed to meet the needs of your congregation, providing prompts for year-long conversations on values-based leadership.

The Scholar Series is meant to be flexible to meet the needs of your congregation. Should you so desire, the URJ Leadership Institute is here to assist you in the implementation of this resource. You can reach us at leadershipinstitute@urj.org

It is our desire to inspire sacred action based on significant ideas within the realm of leadership. We hope that this resource will assist you in having meaningful conversations among your leadership and in strengthening your congregation!

Lisa Lieberman Barzilai, RJE
Director, Leadership Institute
Union for Reform Judaism

Scholars

Harry Kraemer is a professor of management and strategy at Northwestern University's Kellogg School of Management, where he teaches in the MBA and the Executive MBA programs. Additionally, he is an executive partner with Madison Dearborn Partners (MDP), one of the largest private equity firms in the United States, where he consults with CEOs and other senior executives of companies in MDP's extensive portfolio. Kraemer is the former chairman and chief executive officer of the global healthcare company Baxter International Inc.

Dr. Erica Brown is an associate professor at George Washington University's Graduate School of Education and Human Development and the director of its Mayberg Center for Jewish Education and Leadership. She also consults for nonprofit organizations and serves as the community scholar for The Jewish Center in Manhattan. Brown was a Jerusalem Fellow, is a faculty member of the Wexner Foundation and an Avi Chai Fellow, and is the winner of the Ted Farber Professional Excellence Award, as well as a recipient of the 2012 Bernie Reisman Award (Hornstein Jewish Professional Leadership Program, Brandeis University) and the 2009 Covenant Award for her work in education. She lectures and writes widely on subjects of Jewish interest and leadership and is the author of eleven books.

Alan Morinis is the founder and dean of The Mussar Institute and an active interpreter of the teachings and practices of the Mussar tradition, about which he regularly gives lectures and workshops. Born and raised in a culturally Jewish but non-observant home, Morinis studied anthropology at Oxford University on a Rhodes Scholarship. Since 2002, the nearly-lost Jewish spiritual discipline of Mussar has been his passion, a journey recorded in the book *Climbing Jacob's Ladder*. His guide to Mussar practice, entitled *Everyday Holiness: The Jewish Spiritual Path of Mussar*, was published in May 2007. His newest book on Mussar, *With Heart in Mind*, was published in August 2014.

Special Thanks

One of the key concepts on which the URJ Leadership Institute is built is that congregational leaders learn with and from one another. Therefore, in addition to the knowledge gleaned from our scholars, this resource also includes pieces written by the following congregational presidents:

Rozan Anderson, Temple Beth El, Madison, WI

Andrew Engel, Temple Sinai, Washington, DC

Chuck Gealer, Temple Emanuel of Tempe, Tempe, AZ

Greg Miller, Am Shalom, Glencoe, IL

Julie Rochlin, Temple Beth Shalom, Ocala, FL

Barri Waltcher, Temple Shaaray Tefila, New York, NY

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 Learning Session

Harry Kraemer

“By knowing yourself and your values, being committed to balance, and having true self-confidence and genuine humility, you can far more easily make decisions, no matter whether you’re facing a crisis or an opportunity.”

—Harry Kraemer

This section of the URJ Scholar Series Resource is based on the teachings of Harry Kraemer, professor of management and strategy at Northwestern University’s Kellogg School of Management. Kraemer shares how the values of self-reflection, balance, true self-confidence, and genuine humility are core principles of values-based leadership.

Leadership in a congregation is different than leadership in any other organization, even other nonprofit organizations. The responsibilities incumbent upon a congregational leader are sacred and holy tasks, which is why it is not surprising that there should be a set of core values assisting individuals with making decisions and completing assignments.

In his [recorded learning session](#) and article, Kraemer explores the four principles that guide leaders..

The five study guides in this section cover the following topics:

- Board of trustees: True Self-Confidence
- Executive committee: Genuine Humility
- Professional staff: Balance as a Core Principle of Values-Based Leadership
- Executive committee and professional staff: Self-Reflection
- Committee and/or task force: True Self-Confidence

Four Steps to Becoming a Values-Based Leader

By Harry Kraemer

Becoming a values-based leader isn't about emulating a role model or a historic figure. Rather, your leadership must be rooted in who you are and what matters most to you.

In my life, I have tried to stay committed to values-based leadership. No matter what position I'm in, whether father, son, spouse, corporate executive, professor, or board member—or, for that matter, soccer coach, volunteer parent, or Sunday school teacher—I have focused on never losing sight of who I am and what matters most to me.

When you truly know yourself and what you stand for, it is much easier to know what to do in any situation. I believe it comes down to two things:

1. Do the right thing, and;
2. Do the best you can.

That may sound simple, but it's hardly simplistic. Doing the right thing is a lifelong challenge for us all. Fortunately, there are four guiding principles that can help you in the lifelong journey of values-based leadership:

1. Self-Reflection

You identify your values, what you stand for, and what matters most to you. To be a values-based leader, you must be willing to look within yourself through regular self-reflection and strive for greater self-awareness. After all, if you aren't self-reflective, how can you truly know yourself? If you don't know yourself, how can you lead yourself? If you cannot lead yourself, how can you lead others?

2. Balance

Balance is the ability to see situations from multiple perspectives and differing viewpoints to gain a fuller understanding. You consider all sides and opinions with an open mind before coming to a conclusion. You seek to understand before being understood.

3. True Self-Confidence

This means accepting yourself as you are at any point in time. Realizing that you are a work in process, you recognize your strengths and your weaknesses, and you strive for continuous improvement. With true self-confidence, you know there will always be people who are more gifted, accomplished, and successful, but you're OK with who you are.

4. Genuine Humility

Humility enables you to remember who you are and where you came from, and it keeps life in perspective, particularly as you experience success in your career. In addition, it helps you value each person you encounter and treat everyone respectfully. When people ask you how you have achieved certain accomplishments, you realize that in addition to the fact that you have worked hard and have certain skill sets, your accomplishments are also a result of God-given talents.

By knowing yourself and your values, being committed to balance, and having true self-confidence and genuine humility, you can far more easily make decisions, no matter whether you're facing a crisis or an opportunity.

The real beauty of these four principles is that they can be applied by anyone, from the president of a country to the chief executive of a company, from the junior-most person on staff to the unpaid volunteer leader. You can *always* apply the principles of values-based leadership; you don't have to—or want to—wait until you have hundreds of people reporting to you. It is never too early or too late to become a values-based leader.

Good luck on your journey to becoming a values-based leader.

Presidential Responses to Harry Kraemer's Four Steps to Becoming a Values-Based Leader

Julie Rochlin, Temple Beth Shalom, Ocala, FL

Harry Kraemer defines leadership as the ability to influence people to do things they might otherwise not be willing to do and suggests that the way to do so is to relate to others. He asks: “How can I relate to others if I don’t make time to relate to myself?” In his webinar, Kraemer shares four principles of values-based leadership: self-reflection, life balance, true self-confidence, and genuine humility. In my practice of becoming a values-based leader, my initial focus will be self-reflection. As a wife, a mom, and a temple president with a full-time job, time for self-reflection has been rare. The thought of 15 minutes a day spent reflecting on myself seems like a gift.

Kraemer invites us to reflect whether we confuse activity with productivity. We are all busy—active. But are we getting done as much as we want to? Furthermore, he shares his simple practice of setting aside time each night to reflect on his day, which he calls a personal self-examination. Some of the self-reflective leadership questions he shares are: “What are my values? What do I stand for? What really matters?” I am excited to carve out the time to think about my day. This webinar reinforced that the practice of self-reflection will not only benefit me individually, but also those around me and my sacred partners in leadership.

I am eager to use the principle of self-reflection to acknowledge what I do right and to help me focus on a value that has been challenging for me in the past: true self-confidence. It is easy to see the connections among the four principles. It is apparent that growth in one principle leads to greater strength and development in the others. Kraemer assures us that if we try our best and focus on doing the right thing, then worry, fear, anxiety, pressure, and stress can all be reduced.

I am grateful to Harry Kraemer for teaching me these wonderful principles clearly and thoughtfully. The ideas I am taking away will make me a better person and leader for everyone, including myself. As Kraemer said: “If I can lead myself, I can lead others.”

Chuck Gealer, Temple Emanuel of Tempe, Tempe, AZ

Harry clearly described his four principles of values-based leadership in a way that they can be easily applied to our work as communal leaders. Each of the principles is significant and they are interrelated.

Self-reflection: The principle of self-reflection is at the root of effective leadership. Your purpose and values must be clear in order to influence a community to follow your lead. Taking time to regularly take stock of what has worked well, what current issues may become significant, and what sort of environment you want to create will form the foundation for future efforts. One should work to genuinely listen and understand all perspectives of a situation before offering a solution or making a complex decision. Understanding competing perspectives on issues and avoiding letting ego take control will help clarify the path forward.

Life balance: Not all issues are created equal. We should try to spend most of our time on the most important things, whether in our role as a temple leader or in our personal lives. We need to be aware that the most important issues are not always the most urgent, and what seems urgent can sometimes be relatively unimportant.

True self-confidence: Good leaders are aware of their weaknesses, what they know and do not know. They are open to changing their minds, admit when they are wrong, and are ready to learn. They depend on the knowledge and experience of the people they work with in order to make tough decisions. A good leader does not need to be the expert in every situation but does need to have the confidence to guide their team or community through intricate issues.

Genuine humility: We stand on the shoulders of those who came before us. It is important to acknowledge that each of us has had the support of people throughout our lives—parents, coaches, mentors, teammates, etc.—and have been the beneficiary of good timing or plain God-given talent. All this has enabled us to move ahead in life. Having gratitude helps put one’s circumstances in perspective.

I plan to share this learning with other temple leadership in a session at an upcoming board of trustees meeting. Clergy, professional staff, and lay leadership attend, so this will be a good opportunity to discuss how these principles can and do influence each of our leadership styles. In addition, we will be able to see how our interactions with each one another may be influenced and enhanced by a common awareness of these principles.

In an organization where relationships are so important, having a set of these guiding principles provides a solid framework within which to set strategy, make decisions, set budgets, and manage interactions with staff and congregants. We are in the process of revising our mission and vision statements. The intent is to have meaningful and functional statements of who we are as a community and what we aspire to achieve in the future. Our mission and vision statements will reflect our community's underlying values and will drive key strategies and action plans. These values will be supported if our leadership approaches planning and problem solving from within the common framework discussed here.

The principle here that will be of particular importance to me in my role as congregation president is "life balance." As an incoming president, I quickly became aware of the number and variety of issues that need to be addressed. Because of the limited resources available to us, both human and financial, it was apparent that the same level of attention could not be paid to each issue. While perhaps obvious, it was also stressful and difficult to manage from a practical point of view.

I believe that issues should be approached from the perspective of a clearly defined set of values, the congregation's vision for itself, and the basic strategies implemented to achieve that vision. Clear mission, vision, and strategies will enable me to approach problem solving in a balanced, less stressful way than would be possible otherwise.

Board Meeting: True Self-Confidence

In his learning session, Harry Kraemer enumerates four values of leadership: life balance, genuine humility, true self-confidence, and self-reflection. Kraemer says: “With true self-confidence, you know there will always be people who are more gifted, or accomplished, and successful, but you’re OK with who you are.” This study guide will help board members answer the following questions for themselves: Why does my self-confidence matter as a congregational board member? How can I learn to be more self-confident? How can my fellow board members help me achieve greater self-confidence?

Big Ideas

- Values are the foundation of sacred leadership.
- “When you truly know yourself and what you stand for, it is much easier to know what to do in any situation.” (*Harry Kraemer*)
- Our Jewish sacred texts are rich with teachings that shape our values and guide our leadership.

Essential Questions

- What are the values that guide me as a leader?
- How do I stay true to my values?
- How do I respond when circumstances challenge my values?
- How do values shape sacred leadership?

NOTES FOR FACILITATOR

We recommend you read Harry Kraemer’s article and watch the recorded learning session as you prepare to facilitate the discussion or activity. You’ll find this will make it easier to answer any questions that might arise. You might consider asking participants to do the same.

We offer two options to explore the topic. The first is a short discussion with questions posed to the group. The second is a 25-minute activity that delves deeper into the subject. At the end of the listed activities, there is an opportunity to reflect on the learning. We recommend you make the time for this reflection as you conclude, whether you’ve engaged in the discussion or the activity.

Discussion, 10 minutes (Option 1)

Read aloud Harry Kraemer’s definition of true self-confidence: “True self-confidence means accepting yourself as you are at any point in time. Realizing that you are a work in progress, you recognize your strengths and your weaknesses, and you strive for continuous improvement. With true self-confidence, you know there will always be people who are more gifted, or accomplished, and successful, but you’re OK with who you are.” Use this definition as a basis for the discussion.

1. Do you agree with his definition of true self-confidence? Why or why not?
2. Based on his definition, do you consider yourself to be truly self-confident? Why or why not?
3. How might we, as a board, help to build true self-confidence?

Activity, 25-minutes (Option 2)

Materials Needed for the Activity

- Copies of the worksheet “Self-Confidence Characteristic Scale”
- 8½”x11” lined paper
- Post-it® easel pad sheets
- Pens or pencils
- Markers
- Tape

Worksheet on page 14.

Instructions

1. Distribute lined paper and a pen or pencil to each person, and say to the group: “Individually, take a few minutes to think about and write down characteristics of a truly self-confident person.”
2. Come back together as a large group and have people share the characteristics they listed. Record the responses on Post-it easel pad sheets and keep them posted on the wall when completed.
3. Be sure that everyone has a chance to share their list, taking turns. You can ask one person to begin sharing and then, when others share their list, they can add something that is not already there.
4. Ask each person for only one characteristic. Continue to go around the room additional times until everyone’s list is shared. Once the ideas on their list have all been shared, they can just say “pass.”
5. Have copies of the worksheet ready. Ask someone to serve as the scribe for the group. Each characteristic that is shared and written on the easel pad should also be written on a separate worksheet (one characteristic per worksheet).
6. Tape the worksheets on the wall and provide everyone with a marker. Share the following instructions: “Go to each characteristic and consider, on a scale of 1 to 10 (1 being ‘not at all confident’ and 10 being ‘very confident’), how self-confident you feel in this characteristic.”
7. Ask group members to place a tick mark or X on the appropriate place on the scale for each characteristic. Once everyone has completed the task ask them to look around the room at all the characteristics and determine where there is greater and lesser self-confidence among the group.
8. Have the group break up into pairs to discuss the following. (You may want to project the questions on the wall or write them on an easel pad.)
 - To which characteristics of true self-confidence do you most relate? Why?
 - What did the worksheet “Self-Confidence Characteristic Scale” tell us about the overall true self-confidence of our board members as a whole?
 - Why does being self-confident matter as a member of our congregational board?
9. Bring the group back together and ask each pair to share one interesting idea that arose from their conversation that might be helpful for the board to think about with regard to true self-confidence.

Reflection, 10 minutes

Discuss as a full group:

- Is having true self-confidence difficult for you? Why or why not?
- What did you learn about yourself today?
- What did you learn about the board as a whole?
- What can other members of the board do to help you feel self-confident?

Self-Confidence Characteristic Scale Worksheet

Characteristic: _____

1

10

Executive Committee: Genuine Humility

Harry Kraemer asserts that a true values-based leader possesses genuine humility. Genuine humility is expressed in the notion that while taking credit for success, one is also aware that additional factors were at play, for example luck, timing, and acknowledging that we stand on the shoulders of others. Successful leadership is about the team and the talents we have been given by God.

This study guide will allow the members of the executive committee to explore moments when these elements were present and led each person to certain positions on their leadership journey. This topic was chosen specifically for those leaders in your congregation who have risen to a high level of leadership. Being genuinely humble while knowing one's strengths makes for a true leader.

Big Ideas

- Values are the foundation of sacred leadership.
- “When you truly know yourself and what you stand for, it is much easier to know what to do in any situation.”
(*Harry Kraemer*)
- Our Jewish sacred texts are rich with teachings that shape our values and guide our leadership.

Essential Questions

- What are the values that guide me as a leader?
- How do I stay true to my values?
- How do I respond when circumstances challenge my values?
- How do values shape sacred leadership?

NOTES FOR FACILITATOR

We recommend you read Harry Kraemer's article and watch the recorded learning session as you prepare to facilitate the discussion or activity. You'll find this will make it easier to answer any questions that might arise. You might consider asking participants to do the same.

We offer two options to explore the topic. The first is a short discussion posed to the group. The second is a 25-minute activity that delves deeper into the subject. At the end of the listed activities, there is an opportunity to reflect on the learning. We recommend that you make the time for this reflection as you conclude, whether you've engaged in the discussion or the activity.

Discussion, 10 minutes (Option 1)

This is an opportunity to have or continue a conversation with your executive committee about values-based leadership. Encourage each member to share their thoughts and ideas.

1. Say to the group: Kramer states: “Humility enables you to remember who you are and where you came from, and it keeps life in perspective, particularly as you experience success in your career.” He also says: “You need to have people around you who knew you when, so that when people tell you that you are great, they can remind you of your mistakes.”
2. Ask the group the following questions and have them respond:
 - Who is the person in your life who keeps you grounded and humble?
 - Why is he or she that person for you?
 - What does he or she do to help you stay humble?

Activity, 25 minutes (Option 2)**Materials Needed for the Activity**

- 4 Post-it easel pad sheets
- Markers

No worksheet needed.

Advance Preparation for the Facilitator:

1. Label each of the four Post-it easel pad sheets with a different one of the following words/phrases (one word/phrase per sheet): Luck, Timing, Standing on the Shoulders of Others, God–Given Talents.
2. Post the sheets around the room.

During the Activity:

1. Tell the members of the executive committee: “Kraemer has four attributes of values-based leadership, one being genuine humility. Four factors contribute to genuine humility: luck, timing (being in the right place at the right time), standing on the shoulders of others (it is about the team), and the talents we have been given by God.
2. Ask each member to go to each of the four posted sheets and write down an instance in leadership when each of these elements was part of the experience. Preferably, this leadership moment took place in the congregation. If not, any other situation works as well.
3. Once everyone has written on each of the four posted sheets, gather as a full group at the first sheet and look at what is written. Choose only one example and ask the person who wrote it to give a brief telling of the story. Continue to the next three sheets. Be sure that at each of the sheets a different person shares their story.

Reflection, 10 minutes

Kraemer says that “leadership is not a destination, it is a journey.” Tell your executive committee members to share with the full group one thing they have learned about their leadership journey today.

Professional Staff: Balance

The second of Harry Kraemer's four core principles of values-based leadership is balance. Kraemer explains that values-based leaders take the time to understand all sides of the story, which helps them relate to others. Understanding the entire story enables them to gain a balanced perspective. Many people who are in positions of authority have strong opinions—imagine the power of a relationship with a co-worker if a leader can show an interest and appreciation of other perspectives. Not just one other perspective, but the multiplicity of thoughts and ideas that arise around an idea or topic. A successful leader will seek to understand others rather than simply imposing their own points of view.

Kraemer also touches upon an aspect of balance that is commonly referred to as the “work-life balance.” Kraemer asserts that the term should actually be “life balance.” Work is part of your life, just like your family, hobbies, and passions. Integrating all aspects of life helps leaders achieve the necessary balance.

This study guide allows the staff to examine their life balance and helps them to determine whether they are spending too much time in particular areas, whether the balance seems off, and how to begin to make adjustments.

Big Ideas

- Values are the foundation of sacred leadership.
- “When you truly know yourself and what you stand for, it is much easier to know what to do in any situation.”
(Harry Kraemer)
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We recommend you read Harry Kraemer's article and watch the recorded learning session as you prepare to facilitate the discussion or activity. You'll find this will make it easier to answer any questions that might arise. You might consider asking participants to do the same.

We offer two options to explore the topic. The first is a short discussion posed to the group. The second is a 25-minute activity that delves deeper into the subject. At the end of the listed activities, there is an opportunity to reflect on the learning. We recommend you make the time for this reflection as you conclude, whether you've engaged in the discussion or the activity.

Discussion, 10 minutes (Option 1)

This is an opportunity to begin or continue a conversation with your professional staff about values-based leadership. Encourage each member to share their thoughts and ideas. As professionals, especially early in our careers or in a high-stress position, we can easily fall into the mindset that if we put in more time and more work now we will be able to cut back and benefit later. Kraemer argues against this concept. Life balance means that if we deem something important now, we cannot wait until later to give it attention.

As a group, take a moment to reflect on and discuss the following questions:

- Do you have guidelines that help you make time for the various priorities in your life?
 - If yes, what are they?
 - If no, what guidelines can you establish? How much time is spent in committee meetings or extra functions?
- Do you have a plan to compensate for late evenings spent at the synagogue?

Activity, 25 minutes (Option 2)

Materials Needed for the Activity

- Copies of the worksheet “How I Fill My Buckets”
- Copies of the worksheet “How I Want to Fill My Buckets”
- Copies of Chuck Gealer’s presidential response (page 10)
- Pens or pencils
- Markers

Worksheets on pages 19 and 20.

Instructions

1. Distribute the worksheet “How I Fill My Buckets”, pens or pencils, and markers.
2. Ask a staff member to read Chuck Gealer’s presidential response out loud to the group.
3. Have the staff members complete the worksheet. Remind them to think back to Gealer’s thoughts on life balance.
4. Once people have completed the first worksheet, distribute the worksheet “How I Want to Fill My Buckets” and have the staff members complete it.
5. As a group, discuss and reflect on the following questions:
 - What are your initial reflections on how you spend your time?
 - Are you surprised by the amount of time you spend on a certain priority?
 - Are you surprised by how little time you spend on another priority?
 - What, if anything, are you having trouble balancing?
 - Over time, how can you switch to filling the buckets you want to fill?

Reflection, 10 minutes

Answer the following discussion questions:

- If you started to include self-reflection time (another of Kraemer’s core principles of leadership), would that help you find better balance in your life?
- Is there something important to you on which you are spending almost no time?
- What could be a first step toward making more time for that endeavor?

Professional Staff Worksheet 1: How I Fill My Buckets

Below are six buckets representing six priorities in your life. On each bucket write one of your priorities. Examples might include career, family time, professional development, your favorite hobby, health, spirituality, fun, or *tikkun olam*.

With a marker, fill in the buckets by allocating how much time you spend on each priority. You cannot have more than 100%.



Professional Staff Worksheet 2: How I Want to Fill My Buckets

Below are six buckets representing six priorities in your life. On each bucket write one of your priorities. Examples might include career, family time, professional development, your favorite hobby, health, spirituality, fun, or *tikkun olam*.

With a marker, fill in the buckets by allocating how much time you *would like to* spend on each priority. You cannot have more than 100%.



Professional Staff and Executive Committee: Self-Reflection

Harry Kraemer teaches that “self-reflection is not self-absorption.” He defines self-reflection as a necessary practice in order to be an effective leader and reminds us that it is impossible to reflect while doing all the other things we have to do at any given time. Kraemer encourages all leaders to create a daily practice of making time for self-reflection, to take a step back and unplug. Kraemer acknowledges that although making the time for self-reflection is not easy, leaders should be particularly willing to confront themselves. Self-reflection is ultimately about identifying our values, what we stand for, and what matters most to us.

Big Ideas

- Values are the foundation of sacred leadership.
- “When you truly know yourself and what you stand for, it is much easier to know what to do in any situation.”
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- Our Jewish sacred texts are rich with teachings that shape our values and guide our leadership.

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- How do values shape sacred leadership?

NOTES FOR FACILITATOR

We recommend you read Harry Kraemer’s article and watch the recorded learning session as you prepare to facilitate the discussion or activity. You’ll find this will make it easier to answer any questions that might arise. You might consider asking participants to do the same.

We offer two options to explore the topic. The first is a short discussion with questions posed to the group. The second is a 25-minute activity that delves deeper into the subject. At the end of the listed activities, there is an opportunity to reflect on the learning. We recommend that you make the time for this reflection as you conclude, whether you’ve engaged in the discussion or the activity.

Discussion, 10 minutes (Option 1)

This is an opportunity to have or continue a conversation with your executive committee and professional staff about values-based leadership. Encourage each member to share their thoughts and ideas.

Say to the group: Harry Kraemer says: “To be a values-based leader, you must be willing to look within yourself through regular self-reflection and strive for greater self-awareness. After all, if you aren’t self-reflective, how can you truly know yourself? If you don’t know yourself, how can you lead yourself? If you cannot lead yourself, how can you lead others?”

- Why is important to know yourself to be an effective leader?
- What do you think Kraemer means by lead yourself?
- What do you believe is necessary to know about yourself to lead others?

Activity, 25 minutes (Option 2)

Materials Needed for the Activity

- Copies of the worksheet “Self-Reflection”
- Pens or pencils

Worksheet on page 23.

Instructions

1. Say to participants: “Harry Kraemer taught, in his learning session, that worry, fear, anxiety, pressure, and stress will be significantly reduced if you try to do the right thing and try to do the best you can. He teaches 15 minutes a day spent reflecting on five questions can help us, as leaders, try our hardest and be our best. Today’s activity will give each of us the gift of time to do that reflection.”
2. Distribute the worksheet as well as pens or pencils.
3. Give participants 15 minutes to reflect individually on Kraemer’s questions.
4. Once 15 minutes has elapsed, bring the group back to reflect on the experience.

Reflection, 10 minutes

Ask participants what they hope might change if they incorporate the value of self-reflection into their leadership practice.

Professional Staff and Executive Committee Worksheet: Self-Reflection

Harry Kraemer shares five questions he asks himself each night while engaging in the important leadership practice of self-reflection. Spend 15 minutes reflecting privately on your personal responses to these questions.

1. What did I say I was going to do? What did I actually do?
2. What am I proud of? What am I not proud of?
3. How did I lead people? How did I follow?
4. If I lived today over again after having learned about self-reflection, what would I do differently?
5. What did I learn today that will help me tomorrow, when I will focus on what really matters?

Committee and Task Force: True Self-Confidence

In his learning session, Harry Kraemer shares four principles of values-based leadership. The activity and conversation for task force and committee leaders is based upon the principle of true self-confidence. In his article, Kraemer defines true self-confidence as “accepting yourself as you are at any point in time. Realizing that you are a work in process, you recognize your strengths and your weaknesses, and you strive for continuous improvement. With true self-confidence, you know there will always be people who are more gifted, accomplished, and successful, but you’re OK with who you are.” He acknowledges that it is not always easy to admit what you don’t know, but that the truth is, those around you are likely already aware of what you don’t know. The more honest you can be about your strengths and weaknesses the better you will be able to relate to and lead others.

Big Ideas

- Values are the foundation of sacred leadership.
- “When you truly know yourself and what you stand for, it is much easier to know what to do in any situation.”
(*Harry Kraemer*)
- Our Jewish sacred texts are rich with teachings that shape our values and guide our leadership.

Essential Questions

- What are the values that guide me as a leader?
- How do I stay true to my values?
- How do I respond when circumstances challenge my values?
- How do values shape sacred leadership?

NOTES FOR FACILITATOR

We recommend you read Harry Kraemer’s article and watch the recorded learning session as you prepare to facilitate the discussion or activity. You’ll find this will make it easier to answer any questions that might arise. You might consider asking participants to do the same.

We offer two options to explore the topic. The first is a short discussion with questions posed to the group. The second is a 25-minute activity that delves deeper into the subject. At the end of the listed activities, there is an opportunity to reflect on the learning. We recommend that you make the time for this reflection as you conclude, whether you’ve engaged in the discussion or the activity.

Discussion, 10 minutes (Option 1)

1. This is an opportunity to have or continue a conversation with your task force or committee members about values-based leadership. Encourage each member to share their thoughts and ideas.
2. Say to the participants: “According to Harry Kraemer, part of true self-confidence is: ‘realizing that you are a work in process, you recognize your strengths and your weaknesses, and you strive for continuous improvement.’”
3. Ask participants:
 - What activities or volunteer roles are you engaged in at our congregation that enable you to share your strengths?
 - What activities or volunteer roles are you engaged in at our congregation that enable you to grow and improve?
 - What support do you believe the congregation can offer you as a leader to help you develop your self-confidence?

Activity, 25 minutes (Option 2)**Materials Needed for the Activity**

- Blank paper
- Post-it easel pad sheets
- Pens or pencils
- Tape

No worksheet needed.

Advance Preparation for the Facilitator:

1. Place a long line of tape on the floor to represent a continuum. Ensure that there is enough space for all participants to move around.
2. Write the following questions on a Post-it easel pad sheet, for everyone to see.
 - Have you reached the point yet where you are comfortable saying: I don't know?
 - Have you reached the point yet where you are comfortable saying: I was wrong?

During the Activity:

1. Say to the participants: "This session will help each of us reflect on our self-confidence as congregational leaders. In order to understand our strengths and weaknesses, and thereby develop true self-confidence, Harry Kraemer suggests reflecting on the two questions posted on the board." (Ask participants to take a few minutes to reflect privately on these two questions.)
2. Say to the participants: "Today we will share with others how comfortable we are by placing ourselves on a continuum that goes from 'Very comfortable saying I don't know' to 'Not at all comfortable saying I don't know.'"
3. Invite your participants to move to the area of the room where the tape is on the floor. Share the first question again: Have you reached the point yet where you are comfortable saying: "I don't know?"
4. Explain a second time the two ends and span of the continuum, then ask the participants to place themselves on the continuum according to how comfortable they are.
5. Take a moment to make note of where and how participants placed themselves. Ask the group:
 - Are you surprised by what you are seeing regarding where people are standing?
 - Why did you place yourself on that spot of the continuum?
6. Then ask the second question again: Have you reached the point yet where you are comfortable saying: "I was wrong?"
7. Explain that the ends of the continuum are now: "Very comfortable saying I was wrong" and "Not at all comfortable saying I was wrong."
8. Ask participants to place themselves on the continuum according to how comfortable they are.
9. Take a moment to make note of where and how participants placed themselves. Ask the group:
 - Are you surprised by what you are seeing regarding where people are standing?
 - Why did you place yourself on that spot of the continuum?

Reflection, 10 minutes

1. Say to participants: “Kraemer makes the statement that the reason most people don’t want to admit what they don’t know and when they are wrong is because they are concerned about what others will think of them. He reminds us that leadership is about influencing people. In order to be influential, a leader needs to be relatable. Most people don’t relate to people who know everything and are never wrong.”
2. Ask the full group the following questions:
 - Do you agree with Harry Kraemer? Why or why not?
 - How can showing vulnerability and weakness make you a better leader?
 - How can showing vulnerability and weakness enable you to grow?



 Learning Session

Dr. Erica Brown

“Many professionals and volunteers in the Jewish world would suffer from leadership fatigue. One of the chief symptoms and causes of this problem is the same three-letter word: Y-E-S.”

—*Dr. Erica Brown*

This section of the URJ Scholar Series Resource is based on the teachings of Dr. Erica Brown, associate professor at George Washington University’s Graduate School of Education and Human Development and the director of its Mayberg Center for Jewish Education and Leadership.

In her [recorded learning session](#) and article, Brown uses biblical texts to analyze situations in which leaders said yes and no to leadership callings. These examples are used to assist current leaders in making strategic decisions regarding what they consent to take on. Brown uses a text-based approach to help each of us think about when we really want to say yes.

Brown’s assertion is that we should say yes to an opportunity when we believe that we are the right person for the job and that it provides growth potential for us. Too often people are asked to fill an open spot just because the job needs to get done. Brown reminds us that saying yes means we are saying no to something else. Her recommendation is to say yes when you have determined it is the right thing at the right time. No one else can tell someone when it is the right time to say yes. Nevertheless, each time an opportunity comes our way, we need to be open to the possibilities saying yes can offer.

The five study guides in this section cover the following topics:

- Board: Don’t Make People Feel Like Fillers
- Executive Committee: Will Saying Yes Help Me Achieve My Own Leadership Goals?
- Professional Staff: Is There Anyone Else Who Can Do This More Efficiently, More Capably, or More Willingly?
- Executive Committee and Professional Staff: The Cost of Saying Yes
- Committee and/or Task Force: Saying Yes in Order to Grow

When to Say Yes and When to Say No as a Jewish Leader

By Dr. Erica Brown

In my office is a decorative picture with the words “Become a possibilitearian.” The idea that we “dwell in possibility,” as Emily Dickinson once said, makes life and leadership exciting. Experimentation and innovation invite possibility, and one word seems to extend that invitation and respond to it best: Y-E-S.

Many professionals and volunteers in the Jewish nonprofit world suffer from leadership fatigue. One of the chief symptoms and causes of this problem is the same three-letter word: Y-E-S.

Many of us want to please. We want to be loved. We want to be the kind of people who say yes when asked. After all, we enter Jewish organizational life as professionals or volunteers in order to serve, and we serve when we say yes.

But when we say yes too many times and to too many responsibilities, we may find our energy and capacity dangerously thin. Instead of creating possibilities, we may compromise our ability to lead and influence others. Burn-out awaits.

“Yes” can open up—and “yes” can shut down.

Are you saying yes when you really want to say no? The pressure to conform, comply, or contribute often steers well-meaning but overcommitted individuals to say what they don’t really mean. It reminds me of a particularly prescient and short expression in the Talmud: “Rabbi Yohanan says, ‘There is a yes that is like a no and a no that is like a yes.’” (Babylonian Talmud *Bava Kamma* 93a). It’s best to make sure you know what you’re saying.

If you’re a fundraiser or a recruiter, you live for a yes—and there’s a way to expedite that answer. Professors N. Guéguen and A. Pascual conducted a study of what it took to get people on the street to give a charitable donation. The average rate of success was 10%, but when subjects were told they were free to accept or refuse, a striking 47.5% complied.

Asking alone is insufficient. What helped get people to “yes” was the possibility of and personal freedom to say “no.”

Five years later, the same researchers used a similar technique to find out the increased likelihood of people completing a survey if they had an opt-out clause. Not surprisingly, it worked again. This kind of language set up an exchange dynamic where the kindness of giving someone a choice was repaid, if you will, with the participant giving a positive answer. Giving someone else a choice, in other words, feels empowering and is often rewarded with an affirmation.

Giving someone a get-out clause may be a technique we need to more readily apply in the world of Jewish organizational life.

The sense of choice it creates allows people to enter into leadership roles with greater consensuality. It also gives leaders the chance to say no. There will always be guilt attached to saying no, but perhaps it’s time to reassess that guilt.

Many of the people who ask us to get involved, to give money, and to come to another meeting are not doing it because it is to our advantage but because it’s to theirs. This usually doesn’t enhance our leadership sphere of influence; it diminishes it.

Here are seven questions to ask yourself when considering a leadership role:

1. Am I saying yes to satisfy myself or to satisfy someone else?
2. Is there anyone else who can do this more efficiently, more capably, or more willingly?
3. Am I uniquely situated and positioned for this role?
4. Will this role grow my talent and/or give me needed experience and skills?
5. Will saying yes help me better achieve my own leadership goals?
6. Is now the right time in my life to say yes?
7. Will I eventually resent my yes?

If saying no is still difficult, find a verbal narrative that helps you say it gracefully – namely by mentioning but bypassing yes, for example, “I’d love to take this on some day, but now is not the right time for me” or “I’m really engaged in a leadership project that is important to me, so I can’t say yes to you right now” or “I think so-and-so is a better fit for this opportunity.”

Say yes to too many people or responsibilities and you’ll find that what you really care about is not getting enough time and space to live and grow.

My most important piece of advice to leaders: Say no to say a bigger yes. That bigger yes will better grow your passion and compassion.

Presidential Responses to Dr. Erica Brown’s When to Say Yes and When to Say No as a Jewish Leader

Andrew Engel, Temple Sinai, Washington, DC

I was rewarded for my inability to say no with a wonderful presentation by Erica Brown on when to say yes and no as a Jewish leader.

Brown focuses on the pivotal recruitment moment in choosing Jewish leaders: the answer. She categorizes the responses into examples of intentional and passive yes and no responses by biblical leaders. Abraham never says yes to *Elohim’s* request to leave his father’s house and make his name and family in another place. He just picks up and goes. Moses, on the other hand, intentionally agrees to lead by saying “*Hineini*.” In the “no” category, Jonah intentionally runs in the opposite direction to Tarshish. The prophet Samuel demonstrates passiveness when he is pressed into service by his mother, Hannah, and intentionality, when he makes a conscious choice to become a priest.

As I listened to Brown’s learning session, I was reminded that part of the reason I am a leader of my temple is because I keep saying yes. Mine are intentional yeses. Implicit in my assent is a tacit no to other activities. How often are the asks looking for my particular qualities, and how often am I just a filler? I don’t know. But I am aware that as my term winds down, there will be fewer opportunities to say yes in the next year. I will instead enjoy the activities that have been left unattended over the past few years.

I’m inspired by thinking about the intentional choice to say yes. Although I understand that saying no can leave time available for a future yes, I believe that two benefits occur by saying yes. First, the inherent expression of affirmation in the organization by joining its activities. By saying yes, I am demonstrating to all that the institution is one I deem worthy of my time and energy, and I hope that my actions encourage my peers and others to follow suit. Second, the recognition that there are few straight lines in this world. How we arrive at our destination is a unique journey. I have found that saying yes led me to many places I might not have visited had I said no more often.” I will admit that along this temple journey, I have recognized how lucky I was to have the support of my wife and children. In the case of the former, my volunteering allowed my wife to spend her time elsewhere. In the case of my children, they followed my example by being a president of our temple youth group or on the regional board. I will acknowledge that I was following my father, who, when I was growing up, was the president of our congregation.

I plan to share Brown’s wisdom with my officers at our next meeting. I will share it with trepidation, though, as some may reflect on the choices they have made and feel regret. Hopefully, most will find that the teaching reinforces their reason to volunteer their time on the board of our temple. I cannot get over the personal stories that Brown shared. It seemed as if the second half of her presentation revolved around people who made intentional choices to opt out rather than opt in by default—more Jonah than Moses. She describes an instance in which she intentionally says no so she can spend Sunday morning by herself rather than leading a study session with others.

Moving forward, as a leader I will be more aware of the difference between asking someone to fill a role and deliberately choosing a member for their particular strengths. I am sure that in the past, I have been the filler. I was energetic enough to do the job even if it did not fit my strengths. I will say, however, that because of this, I have more strengths now than I had then. Sometimes you have to say yes to the less appealing jobs in order to position yourself for a better one later. Leaders earn trust by completing tasks.

We all would like our congregations to be filled with Moseses, people who intentionally accept the challenge. I fear we will instead find Jonahs who run the opposite direction. In a positive light, I can hope that members will step up and accept responsibility with an intentional yes.

Rozan Anderson, Temple Beth El, Madison, WI

I had the pleasure of participating in the second of this year's URJ Scholar Series when Erica Brown led us in an online discussion entitled "When to Say 'Yes' and When to Say 'No' as a Jewish Leader."

How often do many of us say yes when, actually, we don't want to take on a new task or role? Are we afraid of hurting someone's feelings or letting someone down? What if our rabbi is asking? Often, we're concerned we'll miss out on something important if we don't get involved or that there is no one else who will do the job—or do it as well. While that might be true, when we say yes we may be giving up other opportunities, like spending time with our families, or not getting to the many other competing priorities in our daily lives.

The key, then, is to understand the different motivations for and ways of saying yes and no. Some are empowering for ourselves and for others, while some are not especially helpful to anyone.

Through text study, Brown explained to us the differences between articulated and silent yeses and nos. With articulation, we mean what we say when we say it. We've weighed the pros and cons significantly, considering what's at stake and thinking of all the consequences. We are assertive. "*Hineini!* I am here, and I am in!" or "I cannot at this time, for reasons that are truthful for me."

If we choose an articulated no, we have been thoughtful about it, and we can manage the fallout. A silent yes or no makes us feel weak. We are more likely to think we can back out if the going gets tough, and we may just kvetch our way through the morass—not a place of spirituality, to be sure!

What is important when we are called upon to do something? We want to know that we are chosen because of our unique capabilities and that our time and efforts will be valued and appreciated. We want to feel that we're truly making a difference.

These qualities are also important to keep in mind when we recruit others. Are we asking the right people—why them? What are their special skills, talents, and interests? No one wants to feel like a filler, the only person who was stupid enough or pressured to say yes. Are we clear in explaining what's involved? "I see you have x, y, and z skills, and I think you'd be great! I know you have time constraints, and I want to talk with you about what I think the time commitment is and about finding the right balance." Then, we need to be clear about whether an answer is truly a "yes," a "no," or a "not yet."

In a sacred community, people strive to be mindful of the time and energy of others. Is there a culture of people listening respectfully to one another, for example, in board meetings? Do meetings go on and on with reports that could have been sent out in advance by email? Does the executive committee make all the decisions, so that the board has no true responsibility?

We always want to create sacred spaces, where we remember what made us say yes and where we connect and reconnect with what we love. I'm sure I will have ample opportunity to share these thoughts with others in my congregation, especially as we set up our next leadership class and begin our annual nominating process. We are also about to take a fresh look at our governance structure. In addition, we are always looking for meaningful ways to engage our entire community—to help our members and guests remember and feel good about why they participate in congregational life!

This URJ learning session reminded me of the joy with which I can continue to approach this role of leadership of my congregation. How much more I can give (and get) when I can remember and appreciate the reasons I chose to take on the mantle of leadership—when I live every day knowing what a gift it is that I have this opportunity to make a significant difference in the lives of so many in my community. And that I could have said no and chose to say yes!

Board: Don't Make People Feel Like Fillers

In her recorded learning session, Erica Brown discusses when leaders should say yes or no to possible opportunities. In the Jewish community, people often feel compelled to say yes. Saying yes opens doors to learning new skill sets, sharing expertise, and meeting new people. However, it can feel diminishing to know you are saying yes to someone who is just looking to fill an open slot.

Brown asks us to consider, when we recruit others, whether we are asking the right people. Why them? What are their special skills, talents, and interests? No one wants to feel like a filler. This study guide explores how you can get better at knowing your fellow board members and other leaders in your congregation and how you can make sure their skills and interests are best utilized in their leadership position.

Big Ideas

- Values are the foundation of sacred leadership.
- “When you truly know yourself and what you stand for, it is much easier to know what to do in any situation.”
(Harry Kraemer)
- Our Jewish sacred texts are rich with teachings that shape our values and guide our leadership.

Essential Questions

- What are the values that guide me as a leader?
- How do I stay true to my values?
- How do I respond when circumstances challenge my values?
- How do values shape sacred leadership?

NOTES FOR FACILITATOR

We recommend you read Erica Brown's article and watch the recorded learning session as you prepare to facilitate the discussion or activity. You'll find this will make it easier to answer any questions that might arise. You might consider asking participants to do the same.

We offer two options to explore the topic. The first is a short discussion posed to the group. The second is a 25-minute activity that delves deeper into the subject. At the end of the listed activities, there is an opportunity to reflect on the learning. We recommend you make the time for this reflection as you conclude, whether you've engaged in the discussion or the activity.

Discussion, 10 minutes (Option 1)

This is an opportunity to have or continue a conversation with your board about values-based leadership. Encourage each member to share their thoughts and ideas.

Read Rozan Anderson's comment to the board: “These qualities are also important to keep in mind when we recruit others. Are we asking the right people—why them? What are their special skills, talents, and interests? No one wants to feel like a filler, the only person who was stupid enough or pressured to say yes. Are we clear in explaining what's involved? “I see you have x, y, and z skills, and I think you'd be great! I know you have time constraints, and I want to talk with you about what I think the time commitment is and about finding the right balance.” Then, we need to be clear about whether an answer is truly a ‘yes,’ a ‘no,’ or a ‘not yet.’”

Ask the group the following questions:

- Can you identify a time when you were asked to volunteer and it felt like they were looking for anyone to fill the slot?
- How did that make you feel? Why?
- What are some words and actions we can use to make sure we are asking someone to volunteer based on their interests and skills, and to ensure we are properly filling a role?

Activity, 25 minutes (Option 2)**Materials Needed for the Activity**

- Copies of the worksheet “Board Meeting Interview”
- Pens or pencils

Worksheet on page 33.

Instructions

1. Ask everyone to find a partner, ideally someone they don't know well.
2. Distribute the worksheet “Board Meeting Interview” and pens or pencils.
3. Have one person interview their partner.
4. After ten minutes tell the board members to switch roles, with the interviewer becoming the interviewee.
5. Come back together as a large group.
6. Ask each person to share one special skill or interest they learned about their partner and how that skill or interest can help their partner uniquely contribute to the board.

Reflection, 10 minutes

- Ask the group the following question: How can these interview questions be used to find other volunteers for the board (or other congregational leadership positions)?
- Consider the following question and how you would answer it: If I were talking to a potential leader, I would tell them I love _____ about being on the board, and the unique traits I bring to this role are _____.

Worksheet: Board Meeting Interview

Interview your partner. Write down her or his responses to the respective question or prompt.

How did you become a board member?	
Why did you say yes?	
What do you think is one skill or area of expertise you bring to the board that is unique?	
Do you feel this skill or area of expertise is being well-used in your role on the board or in the congregation at large? If yes, how? If no, how might you be able to make a better contribution to the congregation using this skill or expertise?	
Is there anything you wish our board knew about you or your skill set and expertise?	

Executive Committee:

Will Saying Yes Help Me Better Achieve My Own Leadership Goals?

As Erica Brown asserts in both her recorded learning session and article, each person needs to know when to say yes and when to say no. It is crucial to know when you are the right person for what is being asked of you. Additionally, she claims that you should say no to smaller things to allow you to say yes to something big, an incredible opportunity. When saying yes, it can be the foundation or stepping stone to a new challenge, one that will ultimately help you achieve your goals. Brown puts an emphasis on saying yes to help you grow and learn.

This study guide will help executive committee members reflect on the times they have said yes, and how that yes has assisted them in achieving a personal or congregational goal.

Big Ideas

- Values are the foundation of sacred leadership.
- “When you truly know yourself and what you stand for, it is much easier to know what to do in any situation.”
(*Harry Kraemer*)
- Our Jewish sacred texts are rich with teachings that shape our values and guide our leadership.

Essential Questions

- What are the values that guide me as a leader?
- How do I stay true to my values?
- How do I respond when circumstances challenge my values?
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We recommend you read Erica Brown’s article and watch the recorded learning session as you prepare to facilitate the discussion or activity. You’ll find this will make it easier to answer any questions that might arise. You might consider asking participants to do the same.

We offer two options to explore the topic. The first is a short discussion posed to the group. The second is a 25-minute activity that delves deeper into the subject. At the end of the listed activities, there is an opportunity to reflect on the learning. We recommend you make the time for this reflection as you conclude, whether you’ve engaged in the discussion or the activity.

Discussion, 10 minutes (Option 1)

This is an opportunity to have or continue a conversation with your executive committee about values-based leadership. Encourage each member to share their thoughts and ideas.

If the members of the executive committee have not watched Brown’s recorded learning session, share the following information: “Brown’s thesis of knowing when to say yes and knowing when to say no is about encouraging people to say yes for the right reasons.”

Ask the following questions to the group:

- What is one instance in which you said yes to a leadership position in our congregation that led to you achieving your leadership goals?
- How did it help you achieve your goals?

Activity, 25 minutes (Option 2)

Materials Needed for the Activity

- Copies of the worksheet “Saying Yes to Achieve Your Leadership Goals”
- 3”x3” Post-it® notes
- Lined 8½”x11” paper
- Pens or pencils

Worksheet on page 36.

Instructions

1. If the members of the executive committee have not watched Brown’s recorded learning session, share the following information: “Brown’s thesis of knowing when to say yes and knowing when to say no is about encouraging people to say yes for the right reasons.”
2. Distribute the “Saying Yes to Achieve Your Leadership Goals” worksheet and three 3”x3” Post-it notes to each person; ask everyone to complete the worksheet individually.
3. Once everyone has completed the worksheet and written their three Post-it notes have them place the Post-it notes on a wall or table. Take a moment to put together those that are the same or similar.
4. If there is more than one Post-it note with the same or similar answer on it, discuss as a group why that one yes was so powerful.
5. If there are any unique items, ask the person who wrote it to explain why that one yes was so powerful.
6. Ask the following questions:
 - What major categories do we notice?
 - Why do we think these are the most common in our congregation?

Reflection, 10 minutes

If you did the discussion, distribute lined paper and pens or pencils. If you completed the activity, tell everyone to turn over their worksheet to the back. Say to everyone:

- Write one instance in which you said no to an opportunity that, had you said yes, would have helped you achieve your leadership goals.
- What might have been different had you said yes?

Executive Committee Worksheet: Saying Yes to Achieve Your Leadership Goals

“I’m inspired by thinking about the intentional choice to say yes. Although I understand that saying no can leave time available for a future yes, I believe that two benefits occur by saying yes. First, the inherent expression of affirmation in the organization by joining its activities. By saying yes, I am demonstrating to all that the institution is one I deem worthy of my time and energy, and I hope that my actions encourage my peers and others to follow suit. Second, the recognition that there are few straight lines in this world. How we arrive at our destination is a unique journey. I have found that saying yes led me to many places I might not have visited had I said no more often.”

—Andrew Engel, Temple Sinai, Washington, DC

- List three things to which you have said yes that have led you to achieve your leadership goals at the congregation.
- Write each of them on a 3”x3” Post-it note (one “yes” per note).

Professional Staff: Is There Anyone Else Who Can Do This More Efficiently, More Capably, or More Willingly?

In her presidential response to Erica Brown's learning session, Rozan Anderson lays out her interpretation of when to say yes and when to say no. She believes we say yes for the following three reasons:

- We don't want to hurt the feelings of the person asking us.
- We don't want to hurt someone else's feelings.
- We are afraid of missing out on something important.

Being cognizant of these reasons, Anderson suggests, helps us understand when we are being used as a filler, and when it is, therefore, a good idea to seek out someone else—the right person—for a task. Anderson recommends we consider the skills, talents, and interests required for the task in question. Who is best suited to the position? Will that person be honored to be asked for the right reason? Anderson also strongly emphasizes that we must be clear about the task we are delegating. Therefore, we must give them a proper understanding of the scope and description of the task and be honest about the required time commitment.

Big Ideas

- Values are the foundation of sacred leadership.
- “When you truly know yourself and what you stand for, it is much easier to know what to do in any situation.”
(*Harry Kraemer*)
- Our Jewish sacred texts are rich with teachings that shape our values and guide our leadership.

Essential Questions

- What are the values that guide me as a leader?
- How do I stay true to my values?
- How do I respond when circumstances challenge my values?
- How do values shape sacred leadership?

NOTES FOR FACILITATOR

We recommend you read Erica Brown's article and watch the recorded learning session as you prepare to facilitate the discussion or activity. You'll find this will make it easier to answer any questions that might arise. You might consider asking participants to do the same.

We offer two options to explore the topic. The first is a short discussion posed to the group. The second is a 25-minute activity that delves deeper into the subject. At the end of the listed activities, there is an opportunity to reflect on the learning. We recommend you make the time for this reflection as you conclude, whether you've engaged in the discussion or the activity.

Discussion, 10 minutes (Option 1)

This is an opportunity to have or continue a conversation with your professional staff about values-based leadership. Encourage each member to share their thoughts and ideas.

Say to the staff: “Erica Brown provides us with a textual context for when to say yes and when to say no. She quoted the Talmud, ‘Make your yes one of righteousness, and make your no one of righteousness.’”

Ask the group:

- What does it mean when you say yes with your mouth but want to say no in your heart?
- As a congregational professional, you are constantly being asked for a yes from all different community members. Does it matter who is asking you for a yes?
- Does the subject of the yes have an impact on what your answer is?

Activity, 25 minutes (Option 2)**Materials Needed for the Activity**

- Copies of the worksheet “Is There Anyone Else?”
- Scissors
- Bag

Worksheet on page 39.**Advance Preparation for the Facilitator:**

- Have one staff member cut out all the role-playing prompts and fold them in half, place them into a bag.

Instructions

1. Bring the bag with the prompts to the center of the room.
2. Have staff members take turns pulling one prompt from the bag. They can use a partner or two to act out the scenario based on the prompt. The prompts are purposely vague so that each staff member can craft the situation to their role.
3. If you have more than six staff members participating, you can replace the prompts in the bag once completed to be used again. Since each staff member is unique, the prompts can be repeated.

Reflection, 10 minutes

As a group discuss the following questions:

- How do we know when we should be saying yes and when we should be saying no?
- As Jewish professionals, we get caught up worrying that others might believe we are not doing enough. How do we let go of that worry and find someone better suited to the task?

Professional Staff Worksheet: Is There Anyone Else?

- A. You are asked to do something that is within your role and responsibilities, but you know that if you say yes you will have to renege on other commitments. How do you say “Yes, but...”? How do you communicate the cost of saying yes?
- B. You are asked to do something that you know you should clearly say no to. How do you say “No, but...,” and how do you offer a solution to find someone who can say yes?
- C. You are anxious that if you say no to a task, you will be seen as “not doing enough.” How do you communicate your no and suggest that there is another person who could do this task more effectively?
- D. You have a fellow professional staff member who is feeling stressed about their job. How do you help this staff member let go of the fear that they are “not working hard enough”?
- E. A lay leader is putting a lot of pressure on you to complete a task that is better suited for a lay volunteer. How do you communicate to the lay leader that there is someone better equipped to complete this task?
- F. A fellow professional staff member wants to collaborate with you on a project that does not involve your work-related skills. How do you communicate to your colleague that there may be someone else who is a more capable collaborative partner?

Professional Staff and Executive Committee: The Cost of Saying Yes

Erica Brown acknowledges that nearly all Jewish leaders are overworked and exhausted. She questions whether this is because we are saying yes to what we are uniquely qualified to do or because we don't know how to say no.

This discussion and activity for the professional staff and the executive committee focuses on the cost of saying yes. Brown reminds us that whenever we say yes, whether we realize it or not, we are saying no to something else; whether it is spending time with our family, dedicating time to another professional or volunteer task, or even giving ourselves a much-needed break.

In her article, Brown challenges us by saying: "There will always be guilt attached to saying no, but perhaps it's time to reassess that guilt." The goal of the conversation and activity is for lay leaders and professionals to consider together what it might mean to reassess that guilt.

Big Ideas

- Values are the foundation of sacred leadership.
- "When you truly know yourself and what you stand for, it is much easier to know what to do in any situation."
(*Harry Kraemer*)
- Our Jewish sacred texts are rich with teachings that shape our values and guide our leadership.

Essential Questions

- What are the values that guide me as a leader?
- How do I stay true to my values?
- How do I respond when circumstances challenge my values?
- How do values shape sacred leadership?

NOTES FOR FACILITATOR

We recommend you read Erica Brown's article and watch the recorded learning session as you prepare to facilitate the discussion or activity. You'll find this will make it easier to answer any questions that might arise. You might consider asking participants to do the same.

We offer two options to explore the topic. The first is a short discussion posed to the group. The second is a 25-minute activity that delves deeper into the subject. At the end of the listed activities, there is an opportunity to reflect on the learning. We recommend you make the time for this reflection as you conclude, whether you've engaged in the discussion or the activity.

Discussion, 10 minutes (Option 1)

This is an opportunity to have or continue a conversation with your executive committee and professional staff about values-based leadership. Encourage each member to share their thoughts and ideas.

1. Say to the executive committee members and staff: "Dr. Brown said during her learning session: 'When you say yes to something it always means you are saying no to something else.' Do you agree with her statement? Why or why not?"
2. Ask the executive committee members and staff: "In your personal experience, when you think about balance and work-life integration, what is the first thing you end up saying no to when you say yes to something else?"

Activity, 25 minutes (Option 2)

Materials Needed for the Activity

- Post-it easel pad sheets
- Markers

No worksheet needed.

Instructions

1. Begin by having the professional staff sit together in one group and the executive committee in another. Hand out a Post-it easel pad sheet and marker to each group.
2. Tell each group: “Given your role, create a list of expectations you believe the congregation has of you.”
3. After five minutes, have each group post and explain their list.
4. Ask the full group:
 - What is surprising about the lists? What new insights into the role as a member of the professional staff and the executive committee do these lists provide?
 - As Erica Brown would ask: If you are saying yes to everything on the list, what do you have to say no to?
 - Record the responses on a separate Post-it easel pad sheet.
5. How do you feel about the things that you have had to say no to?

Reflection, 10 minutes

Dr. Brown said in her article: “There will always be guilt attached to saying no, but perhaps it’s time to reassess that guilt.”

Ask the full group:

- In what ways, intentional or unintentional, do we attach guilt to saying no when being asked to do a task in our congregation?
- How might the expectations of leaders change if we work to let go of the guilt of saying no to a task at our congregation?

Committee and Task Force: Saying Yes in Order to Grow

In her article, Erica Brown challenges us with the question “Are you saying yes when you really want to say no?” She teaches us that every yes means we are saying no to something else: time with our family or another volunteer or work commitment, for example. Giving somewhere always means not giving somewhere else. Learning to say no is important because it enables us to say yes to the things that will help us grow and pursue our passions. Brown challenges us to be honest about our yeses and encourages us to learn to say no in order to be authentic to ourselves, our passions, our priorities, and our growth.

Brown goes on to say that “the pressure to conform, comply, or contribute often steers well-meaning but overcommitted individuals to say what they don’t really mean. This reminds me of a quote from the Talmud: ‘Rabbi Yohanan says: There is a yes that is like a no and a no that is like a yes.’ (Babylonian Talmud *Bava Kamma* 93a). It’s best to make sure you know what you’re saying.”

The goal of this discussion and activity is to help participants think about the big yeses they have in mind. They will be encouraged to challenge themselves as they consider their future congregational leadership.

Big Ideas

- Values are the foundation of sacred leadership.
- “When you truly know yourself and what you stand for, it is much easier to know what to do in any situation.”
(*Harry Kraemer*)
- Our Jewish sacred texts are rich with teachings that shape our values and guide our leadership.

Essential Questions

- What are the values that guide me as a leader?
- How do I stay true to my values?
- How do I respond when circumstances challenge my values?
- How do values shape sacred leadership?

NOTES FOR FACILITATOR

We recommend you read Erica Brown’s article and watch the recorded learning session as you prepare to facilitate the discussion or activity. You’ll find this will make it easier to answer any questions that might arise. You might consider asking participants to do the same.

We offer two options to explore the topic. The first is a short discussion posed to the group. The second is a 25-minute activity that delves deeper into the subject. At the end of the listed activities, there is an opportunity to reflect on the learning. We recommend you make the time for this reflection as you conclude, whether you’ve engaged in the discussion or the activity.

Discussion, 10 minutes (Option 1)

This is an opportunity to have or continue a conversation with your task force or committee about values-based leadership. Encourage each member to share their thoughts and ideas.

Say to your task force or committee members: “In her article, Erica Brown says: ‘My most important piece of advice to leaders: Say no to say a bigger yes. That bigger yes will better grow your passion and compassion.’”

Ask the group: “Think for a moment about how you would like to grow as a leader in our congregation. What is the bigger yes that you would like to take on and grow your passion and compassion as a leader?”

Activity, 25 minutes (Option 2)

Materials Needed for the Activity

- Copies of the worksheet "My Bigger Yes"
- 3"x 3" Post-it notes
- Post-it easel pad sheets
- Pens or pencils

Worksheet on page 44.

Instructions

1. Distribute the worksheet, pens or pencils, and 3"x3" Post-it notes, and tell participants to follow the directions found in the worksheet.
2. After everyone has placed their Post-it notes on the wall, have everyone spend a few minutes reading over what the group has written.
3. Together sort the Post-it notes according to the kinds of nos. Are some about family, work responsibilities, or other congregational roles?
4. Create and write a title for each category on the top of an Post-it easel pad sheet and put all the smaller Post-it notes that fall under that category below the title.
5. Ask the group: "What similarities do you notice about what people say no to?"
6. Remind the participants what Erica Brown said in her learning session: "Giving someone a get-out clause may be a technique we need to more readily apply in the world of Jewish organizational life."
7. Ask the participants:
 - Reflect on how you were asked to become part of this committee or task force. Did you feel you could have comfortably said no? Why or why not?
 - How might the congregation need to change its asks so people will feel comfortable saying no?

Reflection, 10 minutes

Share the following questions from Brown's article:

- Will this role grow my talent and/or give me needed experience and skills?
- Will saying yes help me better achieve my own leadership goals?
- Is now the right time in my life to say yes?
- Do you agree that these are the right questions to help you say yes in order to grow? If not, what other questions would you ask yourself?
- How might you employ these questions in your life?

Committee and Task Force Worksheet: My Bigger Yes

Erica Brown says: “My most important piece of advice to leaders is: Say no to say a bigger yes. That bigger yes will better grow your passion and compassion.”

1. Think for a moment about how you would like to grow as a leader in your congregation. What is the bigger yes that you would like to take on in pursuit of growing your passion and compassion as a leader?
2. Turn to your neighbor and discuss the similarities and differences between your answers.
3. On 3”x3” Post-it notes, write down the things you may have to say no to in order to say yes to your bigger yes.
 - Write one response per Post-it note.
 - Write as many things as you feel accurately reflect your personal situation when it comes to saying yes.
 - When you have finished writing, stick your Post-it notes on the wall in the front of the room.



Alan Morinis

“Leadership requires great character at least as much as it demands effective competency.”

—*Rabbi David Lapin*

This section of the URJ Scholar Series Resource is based on the teachings of Alan Morinis, founder and dean of the Mussar Institute.

In his [recorded learning session](#) and article, Morinis explains how Mussar can provide guidance in achieving success as a congregational leader. The Mussar movement explores, develops, and practices certain characteristics and values that its adherents believe can make an individual a strong leader.

Mussar is a Jewish ethical movement developed in the 10th century as a practice for the solitary seeker. In the 19th century it developed further, serving as a response to the Enlightenment. Rabbinic leaders were concerned that exposure to the wider world and culture would drive Jews away from following the mitzvot, commandments. The rabbis urged their followers to engage in regular reflective practice and exercises that would help individuals identify areas of moral and ethical growth. According to the Mussar Institute’s website, the goal of Mussar is to “release the light of holiness that lives within the soul.” Practitioners of Mussar believe that all our thoughts and actions are beyond consciousness and can be traced to the depths of our souls. Through study, reflection, meditation, and other exercises we can bring about positive changes to our nature and behavior. Central assumptions are that everyone must be on a path to change, that no one is perfect, and that perfection is not the goal. Growth and inner balance are the rewards. Rather than focusing on extremes, Mussar strives for a balance within the center.

This section of the resource will help you explore some of the concepts and ideas of Mussar in connection to congregational leadership.

The five study guides in this section cover the following topics:

- Board: Your Personal Curriculum
- Executive Committee: Reflecting on the Character You Bring to Leadership
- Professional Staff: Extremes are Not Good
- Executive Committee and Professional Staff: Humility
- Committee and/or Task Force: Being a Good Leader Involves Change

How to Apply the Lessons of Mussar to Community Leadership

By Alan Morinis

For the past two decades, I've been writing about and teaching Mussar, a treasury of techniques and understandings that have evolved during the past 1,000 years to guide the individual soul to reach its highest potential. Because Mussar guides us toward higher possibilities, it is also entirely applicable in the realm of leadership. That's because leadership is a challenge, and being a good leader is even more of a challenge—and the biggest challenge of all to effective leadership is never the external circumstances, but rather the personal character of the leader, which is exactly what Mussar addresses.

To give you one example, let's take the quality of humility. Is that an inner trait you would you want to see in a leader? If you associate the word "humility" with someone who is meek or submissive, then it's hard to see how being humble would make for great leadership. But does Jewish tradition understand humility in that way? Clearly not, because the Torah (Numbers 12:3) tells us that the person who was more humble than any other person on the face of the earth was none other than Moses.

Meek? Ask the Pharaoh. Submissive? Ask the rebellious Korach. Moses was a man of such *chutzpah* that he even argued with God, challenging God's wish to destroy the Jewish people after the sin of the Golden Calf.

Well, if a person can be humble and assertive at the same time, we need some more guidance from Jewish sources to be able to understand what this quality entails, and how it is revealed in our greatest leader of all time. Then we will be in a position to see how to apply the leadership lessons in our own community situations.

Much before Moses, right back when God was creating Adam, the verse quotes God as saying, "Let us make a human in our image after our likeness..." (Genesis 1:26).

That God speaks in the plural – "Let *us* make a human..."—did not escape the eyes of the Torah commentators, who had to wonder: Who is this "us"? Why doesn't God say, "I will make a human..."? Might God have had a partner in creation? That notion goes directly against the fundamental Jewish principle of monotheism, and so had to be rejected. But if there weren't multiple creators, to whom was God referring as "us"?

The medieval commentator Rashi tells us that before creating the first human being, God consulted with the angels. And in doing so, God gave us a lesson in humility, which means, in Rashi's words, "that the great should take counsel and ask permission from the small."

So here we get a distinctively Jewish leadership principle. A leader should be humble and make it a practice to consult others, even subordinates or people who know less and have less experience. Consulting others could be felt as a threat, and so it is pretty clear that only a person strong enough to take the risk to be humble is a person with a good deal of self-confidence.

But wait! How can that be? In order to be humble you have to be self-confident? We started by associating humility with meekness and diffidence, and so you can see how far from our starting point Jewish sources have guided not only our thinking but also our behavior.

I heard of that principle being put into action in an unexpected context. I had the good fortune to do graduate studies at Oxford University, where one of the colleges is called New College. It was founded in 1397 (note to self: If you think something will last, don't call it "new." The "New" Building at my own college was built in 1733).

The story goes that in the mid-20th century, it was discovered that the giant oak beams in the New College dining hall were infested with beetles. Those beams ran 45 feet long and were very thick around, not the kind of the thing you run down to pick up at your local lumber yard.

The college was in a quandary over how to replace the failing beams, until one Fellow suggested asking the College Forester, the man responsible for keeping the grounds on the college's endowed lands.

They called this man from his work in the woods and asked him if there were any oaks that could be used to save the dining hall.

He replied, “Well, sirs, we was wonderin’ when you’d be askin’.”

He explained that when the college was founded, a grove of oaks had been planted because it was known that oak beams always become beetly and replacement beams would be needed. This plan had been passed down from one forester to the next for 500 years, saying, “You don’t cut them oaks. Them’s for the College Hall.”

Only when someone had the humility to consult with a subordinate was the problem solved. It took real humility and showed great leadership to do this.

This is but one example of applying Jewish values in leadership. We are heirs to a wise tradition. When we find our guiding principles in those sources, not only is leadership enhanced, the organizations and programs and ultimately the entire community benefits. The leadership then embodies and acts from the highest ideals that are articulated within our own tradition.

Presidential Responses to Alan Morinis’ How to Apply the Lessons of Mussar to Community Leadership

Barri Waltcher, Temple Shaaray Tefila, New York, NY

One of the most helpful books I read to prepare for my role as president of Shaaray Tefila is Simon Sinek’s *Start with Why: How Great Leaders Inspire Everyone to Take Action*. Sinek’s emphasis on articulating the values and rationales underlying decisions has guided me in every aspect of my presidency—from making decisions to setting priorities and communicating with stakeholders.

Alan Morinis’ contribution to the Scholar Series on “How to Apply the Lessons of Mussar to Community Leadership” feels like an essential companion piece in my leadership toolbox. While Sinek’s book focuses on the “why” of synagogue leadership, Morinis’ framework looks at the equally important question of “how.”

Mussar’s proposition that character is key to leadership seems intuitive. To me, it’s the next level of Mussar that delivers an important lesson: The articulation of the ten essential leadership traits (humility, honor, gratitude, awareness, patience, order, alacrity, generosity, truth, and loving-kindness) focused my thinking on how our leadership traits can have a positive—or negative—impact on our ability to manage and collaborate within an organization.

For the first several months of my presidency, I engaged in self-evaluation in both the Ed Koch New York style, “How am I doing?” and the broader, “How are we doing?”—the “we” here being me and my fellow synagogue leaders. It’s easy, upon reflection, to see opportunities for improvement, but I didn’t initially see how an essentially personal introspection could drive more effective community leadership, how it could help leadership and, in turn, the synagogue function better.

Mussar supplied a useful lens through which to question how our organization functions—or doesn’t. Why do we have some challenges and not others? Why do some things come naturally to us and others don’t? Mussar teaches that the answer may not lie in external circumstances (e.g. systems, events, history) but rather in ourselves.

One takeaway from this session is that, instead of analyzing how to fix systems, we must think more deeply about and discuss our personal leadership traits. This idea is even clearer to me when I consider a specific issue, such as effective communication. If we aren’t communicating well, developing systems and protocols (e.g. timelines and meetings) may not solve the problem. Neither will drawing sweeping conclusions (“so-and-so isn’t collaborative”), which hampers introspection and personal growth. A part of the solution may be to think about how our character traits set us up for effective communication. To use the forgiving and aspirational language of Mussar, perhaps developing greater patience should be on our leadership curriculum. Thinking about our tendencies in this way can make us more self-aware, which should always be constructive and lead to positive change.

How will this lesson affect my leadership? It will steer me to ask different questions about how I function individually and how our leaders function as a team. By understanding our leadership traits, we can develop language that is safe and productive to help us each develop our curriculum for growth. As a leader, I know the benefit of modeling that process, so I can start by sharing what’s on my curriculum, the areas that I need to work on.

How will I share the learning? These conversations require a foundation of trust. One way to build trust is by using connection questions in meetings; they provide an opportunity for us to get to know one another better and be reflective about our work. Similarly, we have planned a board and senior staff retreat that will provide space for introspective work. I envision providing opportunities through connection questions to share what's on our leadership curriculum, the ways we want to grow, and how we can support one another in that growth.

As Morinis notes in his book *Everyday Holiness*, “Mussar” itself means “correction” or “instruction,” and serves as the modern Hebrew word for “ethics.” There's no better way to engage in the sacred work of a synagogue leader than to do so ethically, with a focus on self-correction and personal improvement.

Greg Miller, Am Shalom, Glencoe, IL

Jewish. Values. Based. Leadership. Recently I had the opportunity to listen to in a URJ learning session featuring Alan Morinis, the founder and dean of the Mussar Institute. Morinis explored these four words and how they can become the foundation of our spiritual life, as well as our daily lives. The Mussar philosophy identifies ethics, correction, and discipline as its core standards for helping individuals understand their personal curricula and access their needs for personal growth and developing their spiritual potentials.

Many of us constantly strive for values-based living. We make decisions daily and seek the right path to take and message to deliver. We find guidance thanks to the relationships with our congregations and clergy; the study of Jewish text; and our relationship with God. We seek direction from those we view as leaders in our life. Those leaders can be compared to a midwife: they help us transform thoughts into reality, giving our ideas life. These leaders possess a great level of character and knowledge, as well as an understanding that there are things they do not know. The process of locating and dispensing knowledge deepens their character and allows them to lead with skills that resonate with those around them.

Jewish values-based living demands acceptance of the responsibility to change. Truth, compassion, and loving-kindness are central to any change we wish for ourselves. We all possess these traits, yet we must recognize our responsibility to find the truth and have the compassion that will allow us to grow and change. Yom Kippur is a wonderful example of how we—as Jews—accept change in ourselves and have an impact on the speed at which our character can change.

In reflecting with my clergy and fellow leaders, I am reminded of the importance of humility. Moses taught our forefathers the lesson of humility by showing the courage and joy to make the right decision in honoring God's word. Moses also reminds us that tough decisions are not always well-received right away. Humility allowed him to persevere and show the Jewish people right from wrong, implementing a new concept of Jewish values and establishing truth and trust with the Jewish people on behalf of God.

Board Meeting: Your Personal Curriculum

Mussar is a Jewish ethical movement developed in the 10th century as a practice for the solitary seeker. In the 19th century it developed further, serving as a response to the Enlightenment. Rabbinic leaders were concerned that exposure to the wider world and culture would drive Jews away from following the mitzvot, commandments. The rabbis urged their followers to engage in regular reflective practice and exercises that would help individuals identify areas of moral and ethical growth. According to the Mussar Institute's website, the goal of Mussar is to "release the light of holiness that lives within the soul." Practitioners of Mussar believe that all our thoughts and actions are beyond consciousness and can be traced to the depths of our souls. Through study, reflection, meditation, and other exercises we can bring about positive changes to our nature and behavior. Central assumptions are that everyone must be on a path to change, that no one is perfect, and that perfection is not the goal. Growth and inner balance are the rewards. Rather than focusing on extremes, Mussar strives for a balance within the center.

In his recorded learning session, Alan Morinis says that every soul has a curriculum that "you may or may not have yet encountered." This study guide provides board members will have the opportunity to explore whether they know what their own individual curriculum is and how it might be connected to their work as a congregational board member.

Big Ideas

- Values are the foundation of sacred leadership.
- "When you truly know yourself and what you stand for, it is much easier to know what to do in any situation."
(Harry Kraemer)
- Our Jewish sacred texts are rich with teachings that shape our values and guide our leadership.

Essential Questions

- What are the values that guide me as a leader?
- How do I stay true to my values?
- How do I respond when circumstances challenge my values?
- How do values shape sacred leadership?

NOTES FOR FACILITATOR

We recommend you read Alan Morinis' article and watch the recorded learning session as you prepare to facilitate the discussion or activity. You'll find this will make it easier to answer any questions that might arise. You might consider asking participants to do the same.

We offer two options to explore the topic. The first is a short discussion posed to the group. The second is a 25-minute activity that delves deeper into the subject. At the end of the listed activities, there is an opportunity to reflect on the learning. We recommend you make the time for this reflection as you conclude, whether you've engaged in the discussion or the activity.

Discussion, 10 minutes (Option 1)

This is an opportunity to have or continue a conversation with your board about values-based leadership. Encourage each member to share their thoughts and ideas.

Read aloud the quote below from Alan Morinis' book *"Everyday Holiness"* and use this quote as a basis for the discussion. If the discussion is animated, you may only be able to pose the first question. If you want to ensure that you explore both questions, we recommend you pay close attention to the time to allow for both conversations.

Quote: "Every one of us is assigned to master something in our lives. You have already been given your assignment and you have already encountered it, though you may not be aware that what faces you is a curriculum, nor that this is the central task of your life."

Ask the full group the following questions and discuss the responses given.

1. Do you agree with Alan Morinis that everyone has a central task in his or her life? Why or why not?
2. Do you think the central task in your life is connected to your work as a congregational board member? Why or why not?

Activity, 25 minutes (Option 2)

Materials Needed for the Activity

- Copies of the worksheet “Journaling”
- Pens or pencils
- Index cards (optional)

Worksheet on page 51.

Instructions

Pass out copies of the worksheet and give participants 15 minutes to complete it. Suggest that participants respond to the prompts in order.

We suggest three different ways to lead the following conversation, depending on how comfortable the group is with sharing personal stories.

1. If people are willing to share their reflections with the group: Bring the group together and ask each person to share something they wrote. After the reflections have been read, note either where there are similarities or if there are one or two answers that are different and might be interesting to think about.
2. If people prefer to have their reflections shared anonymously: Participants may not be willing to share, as some of these questions can be personal. When passing out the worksheets, distribute index cards, as well, and ask each person to anonymously write the reflection they would like shared. Collect the index cards (encourage people to keep their worksheets) and ask one person read the reflections out loud. After the reflections have been read, note either where there are similarities or if there are one or two answers that are different and might be interesting to think about.
3. If you want more time to share reflections: If you would like to have more time for conversation, distribute the worksheet in advance and ask people to bring the completed worksheet with them. This will provide you with more time for personal sharing and conversation. You will need to decide if you are going to have people openly share or complete index cards at the beginning of the session time.

In conclusion, ask the group what they have learned about the board from what people have shared.

Reflection, 10 minutes

- What is one thing you learned about yourself and your personal curriculum?
- What impact will this information have on your work as a congregational leader?

Board Meeting Worksheet: Journaling

1. In what area are you becoming an expert?
2. Do you feel that your area of expertise can lead you to the central path in your life? Why or why not?
3. What are some other skills or traits you might be interested in mastering?
4. How might these be connected to the central path of your life?
5. What are some steps you can take to work toward these goals?
6. How are these goals connected to your work as a board member?
7. In what ways do your skills make you a better board member?

Executive Committee: Reflecting on the Character You Bring to Leadership

Mussar is a Jewish ethical movement developed in the 10th century as a practice for the solitary seeker. In the 19th century it developed further, serving as a response to the Enlightenment. Rabbinic leaders were concerned that exposure to the wider world and culture would drive Jews away from following the mitzvot, commandments. The rabbis urged their followers to engage in regular reflective practice and exercises that would help individuals identify areas of moral and ethical growth. According to the Mussar Institute's website, the goal of Mussar is to "release the light of holiness that lives within the soul." Practitioners of Mussar believe that all our thoughts and actions are beyond consciousness and can be traced to the depths of our souls. Through study, reflection, meditation, and other exercises we can bring about positive changes to our nature and behavior.

Mussar's focus on character and character development requires the ability to be self-reflective. This idea is related to Harry Kraemer's teaching about self-reflection, which focuses on identifying your values and knowing what matters most to you. However, the focus in this study guide is for members of the executive committee to grapple with the concept that a person's character is as important—sometimes more important—than leadership skills. Often, a person in a high leadership position assumes that he or she must be able to do everything. This study guide will enable the executive committee to explore how important it is to know each person's expertise. The executive committee will get a better understanding of what each person does not know and determine who amongst the leadership has the skills and knowledge to do what others cannot. It is a sign of good character when we are willing to admit that we can't do something on our own. With the assistance of or the delegation to others, success is more likely.

Big Ideas

- Values are the foundation of sacred leadership.
- "When you truly know yourself and what you stand for, it is much easier to know what to do in any situation."
(*Harry Kraemer*)
- Our Jewish sacred texts are rich with teachings that shape our values and guide our leadership.

Essential Questions

- What are the values that guide me as a leader?
- How do I stay true to my values?
- How do I respond when circumstances challenge my values?
- How do values shape sacred leadership?

NOTES FOR FACILITATOR

We recommend you read Alan Morinis' article and watch the recorded learning session as you prepare to facilitate the discussion or activity. You'll find this will make it easier to answer any questions that might arise. You might consider asking participants to do the same.

We offer two options to explore the topic. The first is a short discussion posed to the group. The second is a 25-minute activity that delves deeper into the subject. At the end of the listed activities, there is an opportunity to reflect on the learning. We recommend you make the time for this reflection as you conclude, whether you've engaged in the discussion or the activity.

Discussion, 10 minutes (Option 1)

This is an opportunity to have or continue a conversation with your executive committee about values-based leadership. Encourage each member to share their thoughts and ideas.

If the executive committee members have not watched Alan Morinis' recorded learning session, you might want to share the following information about Mussar with them: "Mussar is a Jewish ethical movement developed in the 10th century as a practice for the solitary seeker. In the 19th century it developed further, serving as a response to the Enlightenment.

Rabbinic leaders were concerned that exposure to the wider world and culture would drive Jews away from following the mitzvot, commandments. The rabbis urged their followers to engage in regular reflective practice and exercises that would help individuals identify areas of moral and ethical growth. According to the Mussar Institute's website, the goal of Mussar is to 'release the light of holiness that lives within the soul.' Practitioners of Mussar believe that all our thoughts and actions are beyond consciousness and can be traced to the depths of our souls. Through study, reflection, meditation, and other exercises we can bring about positive changes to our nature and behavior."

Read the following quote to the executive committee: "Leadership greatness requires great character at least as much as it demands effective competency." (*Rabbi David Lapin: "Lead by Greatness"*)

Ask the following question: "When, during your leadership at our congregation, has your character been as important or more important than your competency?"

Activity, 25 minutes, (Option 2)

Materials Needed for the Activity

- Copies of the worksheet "Reflecting on the Character You Bring to Leadership"
- Pens or pencils

Worksheet on page 54.

Instructions

If the executive committee members have not watched Alan Morinis' recorded learning session you might want to share the following information about Mussar with them: "Mussar is a Jewish ethical movement developed in the 10th century as a practice for the solitary seeker. In the 19th century it developed further, serving as a response to the Enlightenment. Rabbinic leaders were concerned that exposure to the wider world and culture would drive Jews away from following the mitzvot, commandments. The rabbis urged their followers to engage in regular reflective practice and exercises that would help individuals identify areas of moral and ethical growth. According to the Mussar Institute's website, the goal of Mussar is to 'release the light of holiness that lives within the soul.' Practitioners of Mussar believe that all our thoughts and actions are beyond consciousness and can be traced to the depths of our souls. Through study, reflection, meditation, and other exercises we can bring about positive changes to our nature and behavior."

1. Distribute the worksheet and ask each person to complete it individually.
2. Once the worksheets are completed, ask each person to find a partner and share their responses with each other.
3. After the pairs have shared their thoughts with each other, bring the group together.
4. Ask each pair to share one insight that grew from their conversation that could make the work of the executive team stronger.

Reflection, 10 minutes

Ask each person to share one way in which they wish to grow in leadership by strengthening their character.

Executive Committee Worksheet: Reflecting on the Character You Bring to Leadership

“A person with great character knows how to access what they don’t know and knows how to get done what they themselves may not be doing, how to draw out of others what they can do.” *Alan Morinis*

Answer the following questions individually.

- In what areas do I, as a leader of my congregation, need the expertise from others around me who know more than I do?
- Who do I know, among current or potential leaders, that could help me with this?
- How might I approach this person/these people to help me in this area?
- I am (reluctant)/(not reluctant) to let people know that I don’t know certain things because...

Professional Staff: Extremes are Not Good

In his recorded learning session, Alan Morinis guides us through leadership lessons from Mussar. Mussar is a Jewish ethical movement developed in the 10th century as a practice for the solitary seeker. In the 19th century it served as a response to the Enlightenment. Rabbinic leaders were concerned that exposure to the wider world and culture would drive Jews away from following the mitzvot, commandments. The rabbis urged their followers to engage in regular reflective practice and exercises that would help individuals identify areas of moral and ethical growth. According to the Mussar Institute's website, the goal of Mussar is to "release the light of holiness that lives within the soul." Practitioners of Mussar believe that all our thoughts and actions are beyond consciousness and can be traced to the depths of our souls. Through study, reflection, meditation, and other exercises we can bring about positive changes to our nature and behavior.

Mussar focuses on the individual and their inner life, which, Mussar teaches, is key to leadership development. Mussar provides us with ten *midot*—character traits—that are connected to leadership:

Alacrity
Awareness
Generosity
Gratitude
Honor
Humility
Loving-kindness
Order
Patience
Truth

These *midot* are all presented on a scale. For example, the extreme counterparts to humility and pride would be arrogance and self-denigration. Chaos and rigidity are the extremes ends of a spectrum in whose center lie order and creativity. Mussar tells us that extremes are not good. It also tells us that there is positive and negative in everything. It is crucial for us to identify what *midot* are on our personal curriculum. By doing so we can work toward avoiding extremes and finding the centering balance.

In this study guide, we use Barri Waltcher's presidential response to look at positive and negative aspects of the leadership *midot*. As stated above, they are neither all positive nor all negative. The goal of this study guide is to make participants understand that rigid truth can sometimes be an obstacle, just like in certain situations, envy can be used as a positive tool to improve our leadership capabilities.

Big Ideas

- Values are the foundation of sacred leadership.
- "When you truly know yourself and what you stand for, it is much easier to know what to do in any situation."
(*Harry Kraemer*)
- Our Jewish sacred texts are rich with teachings that shape our values and guide our leadership.

Essential Questions

- What are the values that guide me as a leader?
- How do I stay true to my values?
- How do I respond when circumstances challenge my values?
- How do values shape sacred leadership?

NOTES FOR FACILITATOR

We recommend you read Alan Morinis' article and watch the recorded learning session as you prepare to facilitate the discussion or activity. You'll find this will make it easier to answer any questions that might arise. You might consider asking participants to do the same.

We offer two options to explore the topic. The first is a short discussion posed to the group. The second is a 25-minute activity that delves deeper into the subject. At the end of the listed activities, there is an opportunity to reflect on the learning. We recommend you make the time for this reflection as you conclude, whether you've engaged in the discussion or the activity.

Discussion, 10 minutes (Option 1)

This is an opportunity to have or continue a conversation with your staff about values-based leadership. Encourage each member to share their thoughts and ideas.

Say to the group: "In her presidential response, Barri Waltcher's states that Morinis helped to focus her 'thinking on how our leadership traits can have a positive—or negative—impact on our ability to manage and collaborate within an organization.'"

A note for the facilitator: Keep in mind that not everyone will know that *midah* is singular for *midot* when you ask the group:

1. How can a *midah* like anger be positive?
2. How can a *midah* like truth be negative?
3. How can extremes prevent our abilities to manage and collaborate within the synagogue?

Activity, 25 minutes (Option 2)

Materials Needed for the Activity

- Copies of the worksheet "Extremes are Not Good"
- Pens or pencils

Worksheet on page 57.

Instructions

1. Participants should get together in pairs.
2. Distribute the worksheet and pens or pencils and ask the pairs to complete the worksheet.
3. Come back together as a whole group and have each pair share their three leadership trait scales.
4. Ask the participants:
 - How do these traits appear in your professional life?
 - What impact do they have in your role?

Reflection, 10 minutes

As a group, discuss the following questions:

- How can the lessons of Mussar help you in your professional role?
- Which of the ten *midot* is most important to your position as a professional staff member?
- Why is it important to have *midot* in Jewish leadership?

Professional Staff Worksheet: Extremes Are Not Good

The Ten Midot (Traits) of Leadership:

- Alacrity
- Awareness
- Generosity
- Gratitude
- Honor
- Humility
- Loving-Kindness
- Order
- Patience
- Truth

Gather in pairs and choose up to three midot to create a scale. Below is an example that Morinis provides for humility. At the center of the scale is humility, whose extreme is self-denigration. On the other side of the center is pride, whose extreme is arrogance.

- Focus on one midah from the list above and together determine its direct opposite. (Numbers 2 and 3 on the scale)
- In a second step, focus on finding the two extremes of this pair. (Numbers 1 and 4 on the scale)
- Repeat this with two more midot from the list above.

Example

1—Self-Denigration	2—Humility	3—Pride	4—Arrogance
Leadership Trait 1:			
1—	2—	3—	4—
Leadership Trait 2:			
1—	2—	3—	4—
Leadership Trait 3:			
1—	2—	3—	4—

Professional Staff and Executive Committee: Humility

Mussar is a Jewish ethical movement developed in the 10th century as a practice for the solitary seeker. In the 19th century it developed further, serving as a response to the Enlightenment. Rabbinic leaders were concerned that exposure to the wider world and culture would drive Jews away from following the mitzvot, commandments. The rabbis urged their followers to engage in regular reflective practice and exercises that would help individuals identify areas of moral and ethical growth. According to the Mussar Institute's website, the goal of Mussar is to "release the light of holiness that lives within the soul." Practitioners of Mussar believe that all our thoughts and actions are beyond consciousness and can be traced to the depths of our souls. Through study, reflection, meditation, and other exercises we can bring about positive changes to our nature and behavior.

Alan Morinis teaches us that we all have our own curriculum, our own path for growth. This explains why each of us is unique, and why each of us has certain challenges. We are here to grow, and our areas of growth represent spiritual potential.

Humility is one of the traits—*midot*—that Morinis discusses. He teaches that the Jewish understanding of humility is unique and has evolved through thousands of years of exploring our textual tradition. He cites Rav Kook's definition: "Humility is associated with spiritual perfection. When humility (...) is genuine, it inspires joy, courage, and inner dignity." Throughout this learning session, Morinis shares several texts that help the listener understand the distinct nature of the Jewish definition of humility.

Big Ideas

- Values are the foundation of sacred leadership.
- "When you truly know yourself and what you stand for, it is much easier to know what to do in any situation."
(Harry Kraemer)
- Our Jewish sacred texts are rich with teachings that shape our values and guide our leadership.

Essential Questions

- What are the values that guide me as a leader?
- How do I stay true to my values?
- How do I respond when circumstances challenge my values?
- How do values shape sacred leadership?

NOTES FOR FACILITATOR

We recommend you read Alan Morinis' article and watch the recorded learning session as you prepare to facilitate the discussion or activity. You'll find this will make it easier to answer any questions that might arise. You might consider asking participants to do the same.

We offer two options to explore the topic. The first is a short discussion posed to the group. The second is a 25-minute activity that delves deeper into the subject. At the end of the listed activities, there is an opportunity to reflect on the learning. We recommend you make the time for this reflection as you conclude, whether you've engaged in the discussion or the activity.

Discussion, 10 minutes (Option 1)

Advance Preparation for the Facilitator:

In advance of the discussion, you will need to identify two events, activities, or programs at the congregation: one that was considered a success and one that was considered less successful.

Instructions

This is an opportunity to have or continue a conversation with your executive committee and professional staff about values-based leadership. Encourage each member to share their thoughts and ideas.

Say to the group: “Barri Waltcher, in her reflections on the teaching of Alan Morinis, writes: ‘Mussar supplied a useful lens through which to question how our organization functions—or doesn’t. Why do we have some challenges and not others? Why do some things come naturally to us and others don’t? Mussar teaches that the answer may not lie in external circumstances (e.g. systems, events, history) but rather in ourselves.’”

1. Discuss a success at your congregation.
 - What individual strengths did you each bring that helped this event succeed?
 - What institutional values added to the event’s success?
2. Discuss a failure at your congregation.
 - From an institutional perspective, what got in the way of the success of this event?
 - What individual strengths could you have brought to make this event a success?

Activity, 25 minutes (Option 2)

Materials Needed for the Activity

- Copies of the worksheet “Definition of Humility”
- Pens or pencils

Worksheet on page 60.

Instructions

The activity is set up as a text study and includes the various definitions of humility Alan Morinis shared during his learning session.

1. Have the group break into pairs. Professional staff members should pair with an executive committee member. If your group is small, you can complete the worksheet with the entire group.
2. Distribute the worksheet “Definition of Humility” and pens or pencils.
3. Allow pairs 10-15 minutes to discuss the texts and questions.
4. Bring the group back together to share their definitions.

Reflection, 10 minutes

As a full group, invite participants to share their responses to the final questions.

- Which parts of your definition speak to a personal strength?
- Which parts of your definition speak to an area of future personal growth?

Professional Staff and Executive Committee Worksheet: Definition of Humility

1. Read the texts below. According to Alan Morinis, they all define features of the Jewish understanding of humility.
 - “[One who is humble]...is secure enough to recognize his or her weaknesses and to seek the input and talents of others.” *Doug Guthrie, Forbes Magazine, as quoted by Alan Morinis in his webinar*
 - “Now the man Moses was very humble, more than any other person on the face of the earth.” *Numbers 12:13*
 - “Humility is associated with spiritual perfection...When it is genuine, it inspires joy, courage, and inner dignity. *The Moral Principle, p. 174*
 - “Humility = Self-esteem.” *Rabbi Elyakim Krumbein, as quoted by Alan Morinis in his webinar*
 - “No more than my space, no less than my place.” *Alan Morinis*
2. Use these texts to create a Jewish definition of humility.
3. Considering your definition, do you believe humility is a necessary trait for Jewish leaders? Why or why not?
4. Which of parts of your definition speak to a personal strength?
5. Which parts of your definition speak to an area of future personal growth?

Committee or Task Force: Being a Good Leader Involves Change

Mussar is a Jewish ethical movement developed in the 10th century as a practice for the solitary seeker. In the 19th century it developed further, serving as a response to the Enlightenment. Rabbinic leaders were concerned that exposure to the wider world and culture would drive Jews away from following the mitzvot, commandments. The rabbis urged their followers to engage in regular reflective practice and exercises that would help individuals identify areas of moral and ethical growth. According to the Mussar Institute's website, the goal of Mussar is to "release the light of holiness that lives within the soul." Practitioners of Mussar believe that all our thoughts and actions are beyond consciousness and can be traced to the depths of our souls. Through study, reflection, meditation, and other exercises we can bring about positive changes to our nature and behavior.

Alan Morinis teaches in his recorded learning session that "leadership character can be developed. There is no question that some people are born leaders, yet the majority of us, including people who are in leadership positions, are not. We are created into leaders, we are shaped and nurtured and grown into a leadership role. And if character is most important, then it's essential as a proposition to acknowledge that people can change and that they can influence the direction and rate of that change."

Most committees or task forces include both veteran and new leaders. Often, veterans serve as the chair, and a combination of long-term and novice leaders serve as members of the committee or task force. Whether we are new to leadership or have been a leader for many years, according to Mussar, we all have the ability and need to change. There are particular traits that Mussar associates with leadership. Reflecting on our individual curriculum, we can take a journey in the areas where growth and change are necessary.

This study guide centers around the willingness and ability to change. Before we explore and examine the itinerary of our individual journey, we need to have the willingness to change. This session focuses on the concept that change is always possible.

Big Ideas

- Values are the foundation of sacred leadership.
- "When you truly know yourself and what you stand for, it is much easier to know what to do in any situation."
(*Harry Kraemer*)
- Our Jewish sacred texts are rich with teachings that shape our values and guide our leadership.

Essential Questions

- What are the values that guide me as a leader?
- How do I stay true to my values?
- How do I respond when circumstances challenge my values?
- How do values shape sacred leadership?

NOTES FOR FACILITATOR

We recommend you read Alan Morinis' article and watch the recorded learning session as you prepare to facilitate the discussion or activity. You'll find this will make it easier to answer any questions that might arise. You might consider asking participants to do the same.

We offer two options to explore the topic. The first is a short discussion posed to the group. The second is a 25-minute activity that delves deeper into the subject. At the end of the listed activities, there is an opportunity to reflect on the learning. We recommend you make the time for this reflection as you conclude, whether you've engaged in the discussion or the activity.

Discussion, 10 minutes (Option 1)

This is an opportunity to have or continue a conversation with your committee or task force about values-based leadership. Depending on the number of participants, you may have enough time to pose all three questions listed below. However, if you have a larger group, we recommend you ask only the final question. Encourage each member to share his or her thoughts and ideas.

If the committee or task force members have not watched Alan Morinis' recorded learning session you might want to share the following information about Mussar with them: "Mussar is a Jewish ethical movement developed in the 10th century as a practice for the solitary seeker. In the 19th century it served as a response to the Enlightenment. Rabbinic leaders were concerned that exposure to the wider world and culture would drive Jews away from following the mitzvot, commandments. The rabbis urged their followers to engage in regular reflective practice and exercises that would help individuals identify areas of moral and ethical growth. According to the Mussar Institute's website, the goal of Mussar is to 'release the light of holiness that lives within the soul.' Practitioners of Mussar believe that all our thoughts and actions are beyond consciousness and can be traced to the depths of our souls. Through study, reflection, meditation, and other exercises we can bring about positive changes to our nature and behavior."

Say to participants: "A key component to the study of leadership through Mussar is that being a good leader involves change."

Pose the following questions to the full group, allowing people to choose the one they would most like to answer; before posing each question, say, "As leaders of our congregation, when you think about personal growth and change":

- What do you find challenging about personal change?
- What is rewarding about personal change?
- Why do you think personal change is a key component to being a good leader?

Activity, 25 minutes (Option 2)

Materials Needed for the Activity

- Copies of the worksheet "Being a Good Leader Involves Change"
- Pens or pencils
- 8½ x 11 sheets of paper each one with one of the following words in large print on the page: humility, honor, gratitude, awareness, patience, order, alacrity, generosity, truth, loving-kindness
- Painters tape

Worksheet on page 64.

Advance Preparation for the Facilitator:

1. Create the 8½ x 11 sheets of paper each one with one of the following words printed largely on the page: humility, honor, gratitude, awareness, patience, order, alacrity, generosity, truth, loving-kindness.
2. Tape the pages onto the walls around the room. Leave enough space between the pieces of paper to allow a group of people to gather in front of it.

Instructions

If the committee or task force members have not watched Alan Morinis' recorded learning session you might want to share the following information about Mussar with them: "Mussar is a Jewish ethical movement developed in the 10th century as a practice for the solitary seeker. In the 19th century it developed further, serving as a response to the Enlightenment. Rabbinic leaders were concerned that exposure to the wider world and culture would drive Jews away

from following the mitzvot, commandments. The rabbis urged their followers to engage in regular reflective practice and exercises that would help individuals identify areas of moral and ethical growth. According to the Mussar Institute's website, the goal of Mussar is to "release the light of holiness that lives within the soul." Practitioners of Mussar believe that all our thoughts and actions are beyond consciousness and can be traced to the depths of our souls. Through study, reflection, meditation, and other exercises we can bring about positive changes to our nature and behavior."

1. Distribute the worksheet "Being a Good Leader Involves Change" and pens or pencils.
2. Have each person complete the worksheet individually. To ensure there is enough time for discussion, allow no more than ten minutes for this part of the activity. After everyone has completed their worksheet, bring the group back together.
3. Say to everyone: "Choose one trait you believe would, with work, help you become a better leader. Go stand at the respective page posted on the wall and begin your discussion there."
4. Ask those standing in each "trait group" to share with their group why this is the one trait they chose. Do this for each trait until you have explored each one where a committee or task force member is standing.

Reflection, 10 minutes

Say to everyone: "Think about one next step you can take in the next month toward making a personal change as you work to become a better leader."

Committee or Task Force Worksheet: Being a Good Leader Involves Change

Our focus today is the concept that being a good leader involves change. Read the following three texts about the idea of change through the lens of Mussar and answer the questions below.

- By understanding our leadership traits, we can develop language that is safe and productive to help us each develop our curriculum for growth. As a leader, I know the benefit of modeling that process, so I can start by sharing what's on my curriculum, the areas that I need to work on. ... As Morinis notes in his book *Everyday Holiness*, "mussar" itself means "correction" or "instruction," and serves as the modern Hebrew word for "ethics." There's no better way to engage in the sacred work of a synagogue leader than to do so ethically, with a focus on self-correction and personal improvement.

Barri Waltcher, President of Temple Shaaray Tefila, New York, NY

- Jewish values-based living demands acceptance of the responsibility to change. Truth, compassion, and loving-kindness are central to any change we wish for ourselves. We all possess these traits, yet we must recognize our responsibility to find the truth and have the compassion that will allow us to grow and change. Yom Kippur is a wonderful example of how we—as Jews—accept change in ourselves and have an impact on the speed at which our character can change.

Greg Miller, President of Am Shalom, Glencoe, IL

- Alan Morinis Recorded Learning Session Time Code 44:30 – 45:45

It is possible for a person to change. A person can affect the rate and the direction of that change...and what can come of that is the cultivation of the character of a leader. ... The goal from the Mussar point of view is not just effective leadership in organizations; it is *k' dushah*, it is holiness. This is the pathway to personal and collective holiness and the Torah says "*kdoshim t'hiyu*, you shall be holy." And when we pursue holiness, everything that is intermediate, like ethics, and success, and peace—that all becomes possible.

Alan Morinis, Founder and Dean of The Mussar Institute

Questions for Reflection and Discussion:

- Why do you think personal change is a key component of being a good leader?
- Why is striving for holiness through change important as a Jewish leader?
- Mussar states that the following are traits of leadership: alacrity, awareness, generosity, gratitude, honor, humility, loving-kindness, order, patience, and truth. Each of us has a personal curriculum for growth. Which of these traits would you put on your list and why?



Personal Torah of Leadership

“Personal Torah of Leadership” is a key concept of sacred leadership used by the URJ Leadership Institute.

Personal Torah of leadership is a set of core values that guides an individual’s actions in leadership and daily life. These values will evolve throughout the course of one’s leadership journey and through continued exploration of Jewish texts and values.

Articulating a personal Torah of leadership through the framework of our sacred Jewish texts serves as a foundation to one’s leadership and helps define the holy in one’s work and the purpose in one’s actions.

This additional section of activities provides an opportunity for congregational leaders to reflect deeply and personally on the essential questions used throughout this resource and creates the opportunity to articulate the values at the core of their leadership.

Essential Questions:

- What are the values that guide me as a leader?
- How do I stay true to my values?
- How do I respond when circumstances challenge my values?
- How do values shape sacred leadership?

The five study guides in this section cover the following topics:

- Board: Personal Torah of Leadership: Identifying Your Core Values
- Executive Committee: An Executive Committee Joint Personal Torah of Leadership
- Professional Staff: Personal Torah of Leadership
- Professional Staff and Executive Committee: Personal Torah of Leadership
- Committee or Task Force: My Personal Torah of Leadership

Board: Personal Torah of Leadership: Identifying Your Core Values

Personal Torah of leadership is a set of core values that guides an individual's actions in leadership and daily life. These values will evolve throughout the course of one's leadership journey and through continued exploration of Jewish texts and values. Articulating a personal Torah of leadership through the framework of our sacred Jewish texts serves as a foundation to one's leadership and helps define the holy in one's work and the purpose in one's actions.

As a leader of your congregation, it is helpful to identify and enumerate the core values in your personal Torah of leadership. Throughout your leadership journey, your values will develop, change, and grow based upon experiences both within and outside the congregation. This study guide aims to assist board members to articulate their individual personal Torah of leadership.

Big Ideas

- Values are the foundation of sacred leadership.
- “When you truly know yourself and what you stand for, it is much easier to know what to do in any situation.”
(*Harry Kraemer*)
- Our Jewish sacred texts are rich with teachings that shape our values and guide our leadership.

Essential Questions

- What are the values that guide me as a leader?
- How do I stay true to my values?
- How do I respond when circumstances challenge my values?
- How do values shape sacred leadership?

NOTES FOR FACILITATOR

We offer two options to explore the topic. The first is a short discussion posed to the group. The second is a 25-minute activity that delves deeper into the subject. At the end of the listed activities, there is an opportunity to reflect on the learning. We recommend you make the time for this reflection as you conclude, whether you've engaged in the discussion or the activity.

Discussion, 10 minutes (Option 1)

This is an opportunity to have or continue a conversation with your board about values-based leadership. Encourage each member to share their thoughts and ideas. We recommend that if you are using the Scholar Series resource for more than this one discussion, the section about personal Torah of leadership should be the final one.

Read aloud the definition of personal Torah of leadership and use this definition as a basis for the questions posed below: “Personal Torah of leadership is a set of core values that guides an individual's actions in leadership and daily life. These values will evolve throughout the course of one's leadership journey and through continued exploration of Jewish texts and values. Articulating a personal Torah of leadership through the framework of our sacred Jewish texts serves as a foundation to one's leadership, and helps define the holy in one's work and the purpose in one's actions.”

Ask participants to think about a value that is important in their work as a congregational leader, in their professional life, and in their personal life. This can always be the same value, or there can be three different values, one for each category. Once each participant has thought of their value or their values, ask the following questions:

1. What is that value or are those values?
2. Are they all the same value or are they three different values?
3. Why do you think that is?

Activity, 25 minutes (Option 2)**Materials Needed for the Activity**

- Copies of the worksheet “Identifying Your Core Values”
- Post-it® easel pad sheets
- Highlighters or markers

Worksheet on page 68.

Instructions

1. Distribute the worksheet and markers or highlighters to everyone.
2. From the values listed, ask participants to highlight or circle those 15 values they would choose as their core values. From the 15 chosen, ask them to rank their top five values.
3. Break up into small groups of three to four people and have everyone compare their lists, using the following questions as a guide:
 - Are there any values everyone chose for their 15?
 - Are there any values no one picked for their top five?
 - Are any common top five values several or all of you have?
4. Have each small group collectively choose a top five for their group.
5. Come back together as a full group. Each break-out group should share their top five values and the reasons why they were chosen.
6. You should record each group’s list on a Post-it easel pad sheet, noting when more than one group shares a value.

Reflection, 10 minutes

Discuss the questions below as a whole group:

- What do the values you selected tell you about your personal Torah of leadership?
- What do the values you selected tell you about the leadership of your board as a whole?
- What does this mean about how we relate to one another in our holy work?

Board Worksheet: Identifying Your Core Values

1. Highlight or circle your 15 core values.
2. Rank your top five values.

_____ Accessibility

_____ Adaptability

_____ Appreciation

_____ Approachability

_____ Attentiveness

_____ Balance

_____ Commitment

_____ Compassion

_____ Competence

_____ Connection

_____ Conviction

_____ Creativity

_____ Dependability

_____ Empathy

_____ Enthusiasm

_____ Expertise

_____ Helpfulness

_____ Impact

_____ Integrity

_____ Intelligence

_____ Optimism

_____ Passion

_____ Patience

_____ Persuasiveness

_____ Realism

_____ Reasonableness

_____ Reliability

_____ Religiousness

_____ Self-respect

_____ Sensitivity

_____ Synergy

_____ Teamwork

_____ Warmth

_____ Wisdom

_____ Zeal

Executive Committee: A Joint Personal Torah of Leadership

Personal Torah of leadership is a set of core values that guides an individual's actions in leadership and daily life. These values will evolve throughout the course of one's leadership journey and through continued exploration of Jewish texts and values. Articulating a personal Torah of leadership through the framework of our sacred Jewish texts serves as a foundation to one's leadership and helps define the holy in one's work and the purpose in one's actions.

This study guide will help individuals on the executive committee share their personal leadership values that are at the core of how they serve as leaders. If you choose to do the activity, the group will begin to work on a single concept of the executive committee's joint personal Torah of leadership. This it will allow the group to work as a stronger leadership team.

Big Ideas

- Values are the foundation of sacred leadership.
- “When you truly know yourself and what you stand for, it is much easier to know what to do in any situation.”
(*Harry Kraemer*)
- Our Jewish sacred texts are rich with teachings that shape our values and guide our leadership.

Essential Questions

- What are the values that guide me as a leader?
- How do I stay true to my values?
- How do I respond when circumstances challenge my values?
- How do values shape sacred leadership?

NOTES FOR FACILITATOR

We offer two options to explore the topic. The first is a short discussion posed to the group. The second is a 25-minute activity that delves deeper into the subject. At the end of the listed activities, there is an opportunity to reflect on the learning. We recommend you make the time for this reflection as you conclude, whether you've engaged in the discussion or the activity.

Discussion, 10 Minutes (Option 1)

This is an opportunity to have or continue a conversation with your executive committee about values-based leadership. Encourage each member to share their thoughts and ideas. We recommend that if you are using the Scholar Series resource for more than this one discussion, the section about personal Torah of leadership should be the final one.

Say to the executive committee: “Today we are going to think about personal Torah of leadership. Your personal Torah of leadership is the set of core values that guides your actions in leadership and daily life. These values will evolve throughout the course of your leadership journey and through continued exploration of Jewish texts and values. Articulating your personal Torah of leadership through the framework of our sacred Jewish texts will serve as a foundation to your leadership and will help you define the holy in your work and the purpose in your actions.”

Ask the following questions to the executive committee members:

- What values, Jewish and secular, are at the core of your leadership in the congregation?
- Why?

Activity, 25 minutes (Option 2)**Materials Needed for the Activity**

- Post-it easel pad sheets
- 8½ x 11 sheets of paper
- Markers

No worksheet needed.

Instructions

1. Say to the executive committee: “Today we are going to think about personal Torah of leadership. Personal Torah of leadership is the set of core values that guides your actions in leadership and daily life. These values will evolve throughout the course of your leadership journey and through continued exploration of Jewish texts and values. Articulating your personal Torah of leadership through the framework of our sacred Jewish texts will serve as a foundation to your leadership and will help you define the holy in your work and the purpose in your actions.”
2. Ask the members of the executive committee to share the values, Jewish and secular, that are at the core of their leadership at the congregation.
3. Have someone serve as a scribe and write the responses on Post-it easel pad sheets. Put them on the wall so they can be seen by everyone.
4. Be sure everyone contributes at least one idea, and continue with this exercise until you are certain all ideas have been shared.
5. Ask the group to reflect on what is written on the page(s) and write a draft executive committee Torah of leadership statement. (This is something that can be worked on beyond this conversation. You might consider sharing this with the full board and giving them a chance to reflect upon the statement.)

Reflection, 10 minutes

- Give each executive committee member a blank sheet of paper to complete the following statement:
- “If someone were to ask me about my personal Torah of leadership I would say... “

Professional Staff: Personal Torah of Leadership

Personal Torah of leadership is a set of core values that guides an individual's actions in leadership and daily life. These values will evolve throughout the course of one's leadership journey and through continued exploration of Jewish texts and values. Articulating a personal Torah of leadership through the framework of our sacred Jewish texts serves as a foundation to one's leadership and helps define the holy in one's work and the purpose in one's actions.

A personal Torah of leadership determines how we serve as leaders in our professional roles. This study guide will help professional staff understand this concept on a deeper, more intimate level. Using the definition of personal Torah of leadership, this study guide will help the participants see how three values play out in their professional and personal lives.

The goal of this study guide is to get participants to think about the relationships between personal and professional values and what impact these values have on leadership. There can be a difference between how a value emerges in the personal and professional realms. For example, creativity in your life could enrich your personal experiences while creativity in the work place could generate outside-the-box concepts to help a synagogue engage a specific demographic.

Big Ideas

- Values are the foundation of sacred leadership.
- “When you truly know yourself and what you stand for, it is much easier to know what to do in any situation.”
(*Harry Kraemer*)
- Our Jewish sacred texts are rich with teachings that shape our values and guide our leadership.

Essential Questions

- What are the values that guide me as a leader?
- How do I stay true to my values?
- How do I respond when circumstances challenge my values?
- How do values shape sacred leadership?

NOTES FOR FACILITATOR

We offer two options to explore the topic. The first is a short discussion posed to the group. The second is a 25-minute activity that delves deeper into the subject. At the end of the listed activities, there is an opportunity to reflect on the learning. We recommend you make the time for this reflection as you conclude, whether you've engaged in the discussion or the activity.

Discussion, 10 minutes (Option 1)

This is an opportunity to have or continue a conversation with your executive committee about values-based leadership. Encourage each member to share their thoughts and ideas. We recommend that if you are using the Scholar Series resource for more than this one discussion, the section about personal Torah of leadership should be the final one.

Say to the group: “Today we will discuss what values are at the core of your leadership.”

Ask the group:

- What three core values are at the center of your leadership?
- How do you use these core values in your professional role?

Activity, 25 minutes (Option 2)

Materials Needed for the Activity

- Copies of the worksheet “Three Core Values”
- Pens or pencils

Worksheet on page 73.

Instruction

In this activity, participants will determine their top three personal and professional values. It is equally acceptable (and expected) to have overlap and some differing values.

1. Distribute the worksheet and a pen or pencil to everyone.
2. Give the group approximately ten minutes to complete the “Three Core Values” worksheet individually.
3. As a group, review and discuss everyone’s answers.

Reflection, 10 minutes

As a group, discuss:

- What are some shared values for the group, derived from each individual’s personal Torah of Leadership?
- How might the sum of each individual’s personal Torah of leadership help us work together as a team?

Professional Staff Worksheet: Three Core Values

Reflect on three values that are at the core of your personal Torah of leadership.

1. _____
2. _____
3. _____

Where do you find these values manifest in your professional life?

Where do you find these values manifest in your personal life?

What challenges prevent you from keeping your values in focus on a day-to-day basis?

In what ways can you remind yourself to keep these values at the center of your leadership?

Professional Staff and Executive Committee: Personal Torah of Leadership

Personal Torah of leadership is a set of core values that guides an individual's actions in leadership and daily life. These values will evolve throughout the course of one's leadership journey as well as through continued exploration of Jewish texts and values. Articulating a personal Torah of leadership through the framework of our sacred Jewish texts serves as a foundation to one's leadership and helps define the holy in one's work and the purpose in one's actions.

In exploring the notion of personal Torah of leadership it is helpful for staff and lay partners to understand the values that guide one another and to identify where those values overlap and how they may differ.

Big Ideas

- Values are the foundation of sacred leadership.
- "When you truly know yourself and what you stand for, it is much easier to know what to do in any situation."
(*Harry Kraemer*)
- Our Jewish sacred texts are rich with teachings that shape our values and guide our leadership.

Essential Questions

- What are the values that guide me as a leader?
- How do I stay true to my values?
- How do I respond when circumstances challenge my values?
- How do values shape sacred leadership?

NOTES FOR FACILITATOR

We offer two options to explore the topic. The first is a short discussion posed to the group. The second is a 25-minute activity that delves deeper into the subject. At the end of the listed activities, there is an opportunity to reflect on the learning. We recommend you make the time for this reflection as you conclude, whether you've engaged in the discussion or the activity.

In advance of the session invite participants to select a Jewish text that is meaningful to them and to bring it to share.

Discussion, 10 minutes (Option 1)

This is an opportunity to have or continue a conversation with your executive committee and professional staff about values-based leadership. Encourage each member to share their thoughts and ideas. We recommend that if you are using the Scholar Series resource for more than this one discussion, the section about personal Torah of leadership should be the final one.

Share the definition of personal Torah of leadership: "Personal Torah of leadership is a set of core values that guides an individual's actions in leadership and daily life. These values will evolve throughout the course of one's leadership journey and through continued exploration of Jewish texts and values. Articulating a personal Torah of leadership through the framework of our sacred Jewish texts serves as a foundation to one's leadership and helps define the holy in one's work and the purpose in one's actions." Make sure the definition is clear and answer any questions or provide any clarifications regarding the term.

For this discussion, you will need markers and Post-it easel pad sheets.

1. Identify a scribe to write answers on an easel pad sheet.
2. Ask participants to share the values they believe make up their personal Torah of leadership.
3. After everyone has shared ask:
 - What are the most common values among our group?

- Are there any differences between the values shared by the professional staff and those shared by lay leaders?
- Is there anything that seems to be missing from the list?

Activity, 25 minutes (Option 2)

Materials Needed for the Activity

- Post-it easel pad sheets
- Paper
- Markers
- Pens/pencils

No worksheet needed.

Advance Preparation for the Facilitator:

A least one week in advance of the session inform participants they will need to identify a Jewish text that is meaningful to them and to bring it to share.

Instructions

1. Say to the participants: “Share the text you brought and tell the group why you selected the text.”
2. As participants listen to the texts shared, they should keep a list of values they hear reflected in the texts.
3. After all participants have shared their texts, have each participant pick one value they have written and ask a scribe to create a list of all the values shared, writing them on a Post-it easel pad sheet.
4. Continue having participants share their values—one value per participant at a time—until all values on each person’s list has been said. (No duplicates need to be shared so once all values listed on an individual’s list has been said, they can pass.)
5. Review the full list of values by asking:
 - How do you apply these values in your congregational leadership duties?
 - Considering the values that should guide congregational leaders, is there anything you would add to this list?

Reflection, 10 minutes

Ask participants how the texts they brought are part of their personal Torah of leadership. In what ways do the texts provide guidance for them as leaders?

Committee or Task Force: My Personal Torah of Leadership

Personal Torah of leadership is a set of core values that guides an individual's actions in leadership and daily life. These values will evolve throughout the course of one's leadership journey as well as through continued exploration of Jewish texts and values. Articulating a personal Torah of leadership through the framework of our sacred Jewish texts serves as a foundation to one's leadership and helps define the holy in one's work and the purpose in one's actions.

This session will help your committee or task force members to understand the values held dear by each individual member. We hope that through this conversation or exercise, members will better understand what is at the center of each person's leadership and why they might make certain decisions or complete tasks based on those values.

Big Ideas

- Values are the foundation of sacred leadership.
- “When you truly know yourself and what you stand for, it is much easier to know what to do in any situation.”
(Harry Kraemer)
- Our Jewish sacred texts are rich with teachings that shape our values and guide our leadership.

Essential Questions

- What are the values that guide me as a leader?
- How do I stay true to my values?
- How do I respond when circumstances challenge my values?
- How do values shape sacred leadership?

NOTES FOR FACILITATOR

To give your committee or task force members a chance to think about their own personal Torah of leadership, you might want to share the definition in the introduction to personal Torah of leadership: “Personal Torah of leadership is a set of core values that guides an individual's actions in leadership and daily life. These values will evolve throughout the course of one's leadership journey as well as through continued exploration of Jewish texts and values. Articulating a personal Torah of leadership through the framework of our sacred Jewish texts serves as a foundation to one's leadership and helps define the holy in one's work and the purpose in one's actions.”

We offer two options to explore the topic. The first is a short discussion posed to the group. The second is a 25-minute activity that delves deeper into the subject. At the end of the listed activities, there is an opportunity to reflect on the learning. We recommend you make the time for this reflection as you conclude, whether you've engaged in the discussion or the activity.

Discussion, 10 Minutes Option 1)

This is an opportunity to have or continue a conversation with your committee or task force about values-based leadership. Encourage each member to share their thoughts and ideas. We recommend that if you are using the Scholars Series resource for more than this one discussion, the section about personal Torah of leadership should be the final one.

Share the definition of personal Torah of leadership: “Personal Torah of leadership is a set of core values that guides an individual's actions in leadership and daily life. These values will evolve throughout the course of one's leadership journey and through continued exploration of Jewish texts and values. Articulating a personal Torah of leadership through the framework of our sacred Jewish texts serves as a foundation to one's leadership and helps define the holy in one's work and the purpose in one's actions.”

Ask the following questions to the committee or task force members:

- What values, Jewish and secular, are at the core of my leadership at the congregation?
- Why?

Activity, 25 minutes (Option 2)**Materials Needed for the Activity**

- Post-it easel pad sheets
- 8½" x 11" sheets of paper
- Markers

No worksheet needed.

Instructions

1. Share the definition of personal Torah of leadership: "Personal Torah of leadership is a set of core values that guides an individual's actions in leadership and daily life. These values will evolve throughout the course of one's leadership journey and through continued exploration of Jewish texts and values. Articulating a personal Torah of leadership through the framework of our sacred Jewish texts serves as a foundation to one's leadership and helps define the holy in one's work and the purpose in one's actions."
2. Ask the members of the committee or task force to share the values, Jewish and secular, that are at the core of their leadership at the congregation. Place Post-it easel pad sheets on the wall and record the responses.
3. Be sure that everyone shares at least one idea. Continue with this exercise until you are certain all ideas have been shared.
4. Ask the group to reflect on what is written on the page(s).
4. Ask the group: "What impact might our values have on the way in which we do our work on our committee or task force?"

Reflection, 10 minutes

- Give each committee or task force member a blank sheet of paper and write a response to the following statement:
- "If someone were to ask me about my personal Torah of leadership I would say..."

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