MANAGEMENT FACTORS ASSOCIATED WITH PERCEIVED EFFECTIVENESS IN REFORM JEWISH CONGREGATIONS: QUESTIONNAIRES ELICITING LEADER AND MEMBER PERSPECTIVES

DISSERTATION

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By

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This study applies some aspects of the management research previously done with nonprofit organizations in general to Reform Jewish congregations specifically. The investigation was informed by a social constructionist perspective and a multiple constituency model. Given the difficulty in establishing an objective measurement of effectiveness for congregations, congregational effectiveness was defined in terms of reputational effectiveness.

Two questionnaires were developed, one for leaders and one for members. The leader questionnaire included indicators of five constructs – shared vision, member empowerment, board development, self-evaluation and reputational effectiveness. The member questionnaire included indicators of three constructs – shared vision, member empowerment, and reputational effectiveness. The questionnaires were mailed to all leaders and members of two mid-western Reform Jewish congregations. The mailing resulted in 53 usable leader responses and 235 usable member responses. Factor analysis of the member responses developed three scales for members based on the constructs included in the member questionnaire. The factor analysis from the member data also formed the basis for the leader scales resulting in five leader scales based on the constructs included in leader questionnaires. The scales were demonstrated to be reliable and valid.
The member and leader scales were subjected to multiple regression analysis. The results for leaders revealed a statistically significant positive relationship between board development and reputational effectiveness and between member empowerment and reputational effectiveness. This leader data also resulted in a significant explanation of the variance in reputational effectiveness by a linear combination of shared vision, member empowerment, board development, and self-evaluation.

The results for members revealed significant positive correlations between shared vision and reputational effectiveness and between member empowerment and reputational effectiveness. The member data also resulted in a significant explanation of the variance in reputational effectiveness by a linear combination of shared vision and member empowerment.

A moderator effect of member/leader status was found. With shared vision and member empowerment as predictors, the expected change in ratings of effectiveness is influenced by the members/leader status of the respondents.

The data in this study of Reform Jewish congregations was consistent in many ways with the research done with nonprofit organizations in general. Synagogue managers and consultants can apply this data by encouraging organizational planning that includes member input and board education. By engaging in management behaviors that facilitate a sense of empowerment among leaders and members congregations are likely to improve the perceptions of effectiveness among both of these constituent groups. This data demonstrates the value of including leader and member perspectives when attempting to understand the functioning of a religious congregation.

iii
Dedicated to my husband, Neil
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## TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dedication</td>
<td>iv</td>
</tr>
<tr>
<td>Acknowledgments</td>
<td>v</td>
</tr>
<tr>
<td>Vita</td>
<td>vii</td>
</tr>
<tr>
<td>List of Tables</td>
<td>xiii</td>
</tr>
<tr>
<td><strong>Chapters:</strong></td>
<td></td>
</tr>
<tr>
<td>1. Introduction</td>
<td>1</td>
</tr>
<tr>
<td>Problem statement</td>
<td>1</td>
</tr>
<tr>
<td>Diversity in Reform Jewish congregations</td>
<td>2</td>
</tr>
<tr>
<td>The focus of this study</td>
<td>5</td>
</tr>
<tr>
<td>Significance of the Study</td>
<td>6</td>
</tr>
<tr>
<td>Congregations as service providers</td>
<td>6</td>
</tr>
<tr>
<td>Nonprofit organizations and congregations</td>
<td>10</td>
</tr>
<tr>
<td>Churches and synagogues</td>
<td>11</td>
</tr>
<tr>
<td>Congregations as membership organizations</td>
<td>13</td>
</tr>
<tr>
<td>Leader/member status in Reform Jewish congregations</td>
<td>15</td>
</tr>
<tr>
<td>Summary</td>
<td>16</td>
</tr>
</tbody>
</table>
2. Literature review ............................................................. 18
   Theoretical perspectives ............................................... 18
      Effectiveness in nonprofit organizations ....................... 19
      Social constructionism perspective ............................ 23
      Multiple constituency model ....................................... 25
   Theoretical approach of this study ................................. 29
   Empirical perspectives .................................................. 29
      Effectiveness and shared vision .................................. 30
      Effectiveness and board development ........................ 34
      Effectiveness and self-evaluation ............................... 38
      Effectiveness and power ........................................... 40
   Summary .......................................................................... 44
3. Methodology ................................................................. 45
   Operational definitions ............................................... 45
   Research questions .................................................... 49
   Design of the study ..................................................... 52
   Subjects .......................................................................... 53
   Instrumentation ........................................................... 56
   Data collection procedure ........................................... 58
   Data analysis .................................................................. 61
      Analyses regarding the questionnaires ........................ 61
      Relationships among the variables .............................. 62
Role of constituency in relation to the variables ............... 63

“Importance of membership” as a possible moderator ........ 63

Hypotheses ................................................................. 64

4. Results ................................................................. 65

Response to survey ......................................................... 65

Congregation A ............................................................ 66

Congregation B ............................................................ 67

Total Response ........................................................... 68

Comparing the two mailings to Congregation A ............... 71

Description of Respondents ........................................... 72

Member Respondents .................................................... 72

Leader Respondents ..................................................... 74

Comparison of leader and member respondents .......... 76

Data Processing ........................................................... 77

Development of the survey instruments ......................... 78

Appropriateness of data for factor analysis ..................... 79

Selection of rotation and extraction procedure ............... 81

Investigation of the loadings ......................................... 82

Scales based on factor analysis ..................................... 84

Reliability of factor scales ............................................ 87
Analyses related to the hypotheses .............................................................. 88

Relationships among the variables ...................................................... 88

Multiple regression analyses ............................................................... 92

Comparing leader and member responses .......................................... 96

The influence of leader/member status .............................................. 97

The influence of “importance of membership” ................................. 100

5. Discussion .......................................................................................... 102

Application of findings to the theoretical base of the research ........ 102

Overview of the findings ................................................................. 104

Interpretation of the hypotheses ...................................................... 104

The independent variables ............................................................... 106

The influence of status and member/leader differences ................. 112

Confounding variables ........................................................................ 114

Environmental variables ................................................................. 114

Congregational variables ................................................................. 115

Individual variables ........................................................................... 116

Limitations of the study ................................................................. 117

The survey instruments and future research ..................................... 119

Implications for congregations and other nonprofit organizations . 121

Conclusion .......................................................................................... 122

List of References ................................................................................. 126
Appendices ........................................................................................................ 131

Appendix A: Letter of explanation ............................................................ 131
Appendix B: Statements of agreement to participate .............................. 134
Appendix C: Leader questionnaire ............................................................ 137
Appendix D: Member questionnaire .......................................................... 144
Appendix E: Cover letters ................................................................. 149
Appendix F: Reminder postcard ................................................................. 161
Appendix G: Member Scales ............................................................... 162
Appendix H: Leader Scales ................................................................. 166
## LIST OF TABLES

<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Response rates for Congregations A and B to mailings of leader and member questionnaires</td>
<td>70</td>
</tr>
<tr>
<td>2.</td>
<td>Factor Correlation Matrix</td>
<td>82</td>
</tr>
<tr>
<td>3.</td>
<td>Pattern matrix from factor analysis of member questionnaire</td>
<td>83</td>
</tr>
<tr>
<td>4.</td>
<td>Descriptive statistics for leaders on the independent and dependent variable scales</td>
<td>89</td>
</tr>
<tr>
<td>5.</td>
<td>Correlation matrix of the scales for leaders</td>
<td>90</td>
</tr>
<tr>
<td>6.</td>
<td>Descriptive statistics for members on the independent and dependent variable scales</td>
<td>91</td>
</tr>
<tr>
<td>7.</td>
<td>Correlation matrix of the scales for members</td>
<td>91</td>
</tr>
<tr>
<td>8.</td>
<td>Summary of simultaneous regression analysis for leader variable scales predicting reputational effectiveness.</td>
<td>94</td>
</tr>
<tr>
<td>9.</td>
<td>Summary of simultaneous regression analysis of member variable scales predicting reputational effectiveness.</td>
<td>95</td>
</tr>
</tbody>
</table>
10. Summary of simultaneous regression analysis for interaction of
leader/member status with perceptions of shared vision when predicting
reputational effectiveness ................................................................. 98

11. Summary of simultaneous regression analysis for interaction of
leader/member status with perceptions of member empowerment when
predicting reputational effectiveness ............................................. 100
CHAPTER 1

INTRODUCTION

THE PROBLEM STATEMENT

Much research has been done in an effort to understand the factors contributing to the effectiveness of nonprofit organizations. As a result of this research, a body of knowledge regarding the relationship between specific organizational behaviors and organizational effectiveness has been developed. While some of the researchers included religious congregations in their sample, most did not. Among those that did include religious congregations, few included Jewish congregations. This study, through the development of two survey instruments, is an effort to determine if the relationships found between a set of organizational behaviors and organizational effectiveness are consistent for a group of religious congregations, specifically Reform Jewish congregations.

Congregations are nonprofit member organizations, whose members have some level of commitment to a similar ideology. There is usually, but not always, professional clergy leadership, sometimes professional administrative leadership, and some body of volunteer lay leaders managing the organization’s business and activity. Generally the number of paid staff, if there is any, is small in number compared to the number of unpaid
volunteer workers. Working within the congregation context for both professionals and volunteers often involves an emotional element and sometimes long family histories of involvement and commitment. These are among the differences between nonprofit organizations in general and religious congregations. Does knowledge arising from research of nonprofit organizations in general apply to religious congregations, to Reform Jewish congregations in particular?

DIVERSITY IN REFORM JEWISH CONGREGATIONS

Today's Reform Jewish congregations must function with a membership that is diverse in background and expectations, a situation arising from the history of Reform Judaism and its philosophy. Reform Judaism was originally a product of early nineteenth century German Jewish reforms in Jewish practice for the purpose of maximizing the relevancy of Judaism in an increasingly secular life style. The Reform Judaism practiced in the U.S. between the middle of the nineteenth century and the middle of the twentieth century remained closely tied to those German roots and congregations were largely homogeneous in their demographics (descendants of German Jews) and their practice of what is now referred to as "classical" Reform Judaism. In the latter half of the twentieth century, following the Holocaust, there was tremendous influx into those congregations of Jews from more traditional denominational backgrounds (Conservative and Orthodox Jews, largely Eastern European in origin). This influx resulted in a "traditional" interpretation of Reform Judaism. The backgrounds from which the members of Reform congregations hail is further diversified by the relative acceptance of converts from other
faiths or those who previously held to no religious faith. Historically, Judaism
discouraged conversion into its ranks. Reform Judaism parted from this thinking,
especially in recent decades, providing programs for the education and socialization of
"Jews-by-Choice." Reform congregations today include converts in all aspects of
congregational life. Many Reform congregations also accept as members the non-Jewish
spouses of Jewish members. Thus the religious backgrounds and current practices of the
members of today's Reform congregations include classical Reform Judaism, Orthodox
and Conservative Judaism, Christianity and other faiths, as well as those with an absence
of any religious upbringing. Each of these backgrounds carries with it emotionally rooted
memories and expectations. The conflict between the Reform traditionalists and Reform
classicalists is apparent in many congregations, especially those congregations that were
well established prior to the change in congregational demographics that occurred in the
middle of the twentieth century.

Two additional philosophical factors add to the diversity in Reform congregations.
One of these is the philosophy of freedom of belief, the absence of absolute dogma.
Acceptance in the community does not require the individual members to buy into a set of
beliefs, to express their belief in worship or in a specific worship mode, or in life style.
While this philosophy promotes acceptance of ideas and an opportunity to explore new
theological and liturgical perspectives, it also contributes to the opportunity for dissension
and conflict. The second philosophical factor adding to the diversity in Reform Jewish
congregations is the evolutionary nature of Reform Judaism. Change is part of the fabric
of Reform, its members often reminded of this by the expression "Reform is a verb". The
underlying theme is the maintenance of a Judaism that is reflective of the times and responsive to contemporary life. To maintain responsiveness, changes occur in worship mode (e.g., prayers recited in Hebrew vs. English and changes in the gender sensitivity of the liturgy), political stance (e.g., support for the State of Israel), and attitude (e.g., response to the education of children being raised in two faiths). These changes take place slowly over an expanse of time. As a result Reform Judaism may feel very different from one generation to the next.

In spite of such diversity in background and beliefs in a context of change, many congregations manage to deal with these challenges in a positive manner, moving forward in their efforts to attain goals and to grow in number and spirit. These congregations can be described as “more effective.” But, with such diversity in background and variation in expectations, it is no small wonder that there is conflict in many Reform congregations and that some congregations are having difficulty in living with their differences. These congregations exhibit diminishing membership, programming difficulties, and fund-raising shortfalls. They may have difficulty in establishing a lasting bond with clergy and may engage in power struggles with their rabbinic leadership. There is often a sense of dissatisfaction among the membership. They may find themselves in a tail-spin of conflict, mired in polarized expectations and solutions. Congregational unhappiness leads to poorly supported programs and further difficulty in raising funds. The ongoing conflict undermines the well-being of the congregation. Ingram (1980) describes the threats to harmony as interfering with the ability of a church to engage in worship, education, and recruitment. And not only does conflict in the congregation make recruitment of new
members difficult, it can result in the loss of existing membership. On the basis of interviews, O'Sullivan (1995) concludes that congregation switching is usually the result of discord in the old congregation. Congregations that meet this description can be described as “less effective”. Dale Glasser, Director of the Union of American Hebrew Congregations Department of Synagogue Management, estimates that, at any given time, 10% of the Union's over 900 congregations are experiencing such on-going problems (Personal communication, September 10, 2002).

THE FOCUS OF THIS STUDY

This study investigates the relationships of specific organizational behaviors with effectiveness as these factors are perceived by leaders and members of Reform Jewish congregations. The two congregations included in the study were selected from among the more than 900 congregations affiliated with the international denominational organization for Reform Jewish congregations, the Union of American Hebrew Congregations (UAHC).

This investigation was accomplished through the development of two questionnaires, one for leaders of the congregation and one for members not currently serving in leadership positions. It is my contention that leaders and members represent two broad constituency groups in congregations. After years of experience in Reform Jewish leadership and after reviewing the literature regarding nonprofit organization effectiveness, I believe there is a difference between leader and member perspectives, that those in the “inner circle” of a congregation’s management will perceive congregation
characteristics and effectiveness differently from those outside the circle. The congregation leader perspective was explored by surveying members of congregations who are currently serving as paid staff or as volunteer members of their synagogue board. The member perspective was explored by surveying individuals who are members of the same congregations as the leaders but not currently serving as paid staff or as congregation board members.

I undertook this research to learn if the impact of specific administrative practices in Reform Jewish congregations is consistent with that of other nonprofit organizations and to investigate the influence of the member/leader perspective on the relationship between perceptions regarding those practices and congregation effectiveness.

SIGNIFICANCE OF THE STUDY

CONGREGATIONS AS SERVICE PROVIDERS

Organized religion is very much a part of the fabric of life in the United States. According to the latest census, 68% of the U.S. population is affiliated with a church or synagogue (U.S. Census Bureau, 2001). Religious institutions play a variety of roles in the lives of their members including the provision of "meaning, control, intimacy, and values", serving as markers and facilitators of life's transitions, serving as "sources of social status, symbols of continuity, and welfare institutions", sources of hope and power, and promoters of mental health (Pargament et al., 1991, p. 393). Maton and Wells (1995) describe congregations as a resource for "prevention, healing, and group empowerment"
Harris (1995) describes the formal and informal welfare services beyond their own membership that are provided by congregations.

Congregations that are caught up in conflict, financial problems, and dissatisfaction have difficulty providing these services. Davidson and Pyle (1994), in their discussion of church giving, provide the following description of a congregation in which the members will be generous:

Pastoral leadership is of high quality when pastors can point their churches in exciting new directions, relate well with members, and work effectively with other members of the church staff. Lay leadership is effective when talented members take their responsibilities seriously and make sound decisions. Relationships among members are cohesive when members know each other, like each other, help each other in times of need, and feel they are a part of a caring community of believers. Members’ sense of belonging to a special church is evident when they believe that other members take their faith seriously and when they feel that their church has a special mission setting it apart from other congregations...[Members] will tend to be generous. They will feel they are investing in a church which has the ability to serve their needs. (p. 182-183)

Davidson and Pyle then describe congregations that will attract less giving from members:

When they lack confidence in their pastors, when they question lay leaders’ competence, when there is little or no solidarity among the members, and when
there is nothing special about the church or its mission, members will be less
generous. They won’t be as sure that their investment will yield the kinds of
benefits they want. (p. 183).

Without the financial support of its members, synagogues cannot sustain the expense of
adequate staffing, facilities, materials, or programs to provide services needed and
expected by its membership. Dissatisfaction leads to less financial support; less money
leads to fewer services; fewer services lead to greater dissatisfaction.

Congregations are governed by boards of directors comprised of lay leaders.
Effective board functioning is associated with effective organization functioning (Green
and Greiesinger, 1996; Herman and Renz, 1997). Holland, Leslie, and Holzhalb (1993), in
their study of the culture of more effective and less effective boards, describe the cultural
assumptions of the more effective boards as follows:

Although individuals were valued, the board was considered a group whose
interpersonal relations and patterns of communication were vital to success.
Members shared a strong ideological commitment to equality and democracy in
their process...[L]eaders on these boards purposely created informal social
opportunities for members to become better acquainted and develop bonds of
friendship...Win-lose polarizations were avoided as unproductive traps, and
participants approached problems by actively brainstorming to identify multiple
perspectives and seeking alternatives that would meet a variety of needs and draw
everyone into shared commitment to a decision. (p. 148)
The culture of less effective boards were described as based on the underlying assumptions that the world operates in terms of win-lose patterns, that money is the most powerful resource, and that successes are due to individual skills and problems or losses due to individual deficiencies. The individual was assumed to be the basic unit of reality, and individual skills and interests (or defects) were the most important determinants of actions...The organization was assumed to exist for the purpose of serving the individual interests and needs of some constituency (such as clients, students, or members)...[T]he organization did not exist for itself but for the external purpose, which was defined in terms of the interests of some such individuals or aggregations. Likewise the board did not exist for itself but only to advance the organization’s efforts to meet the individual interests of the members of its key constituency. (p. 147)

Boards functioning in this way do not avoid polarized factions and win-lose situations. Disenfranchised individuals and constituencies will express their dissatisfaction with less financial support or resignation from the congregation. Donahue (1994) described the situation as follows:

Do people give (or fail to give) regardless of whether or not they like their congregation? It is more likely that people quickly vote with their feet, and leave congregations they dislike... (p. 156)

When boards of directors function in less effective ways and see their members — the primary resource of the congregation – are walking out the door or reducing their
support, the congregation may find that it is less able to provide the services their remaining members need and expect. Congregational leaders may have a sense that something is wrong but they may be unaware of the behaviors that are contributing to their difficulty. It is necessary to identify congregational management characteristics associated with effective functioning in order to make informed decisions and find appropriate solutions that will lead to greater effectiveness in the provision of services.

NONPROFIT ORGANIZATIONS AND CONGREGATIONS

While it has been demonstrated that employing some specific management practices is associated with greater organizational effectiveness, much of the research has focused on nonprofit organizations (NPOs) other than religious congregations. It has not been empirically demonstrated that the impact of specific management practices is the same for congregations as it is for NPOs in general. Congregations are member organizations in which there is a high level of emotional involvement and in which there is great expectation of spiritual, educational, and social experience. Membership in such an organization may involve a personal investment unlike that of any other NPO, impacting positively or negatively on the contribution of management practices to the perception of effectiveness of the organization. In addition, as member organizations, the congregation’s members who serve as volunteer leaders are also direct beneficiaries of the organizations services. This may result in a difference in perceptions of effectiveness from
NPOs that are not member organizations. Thus, it remains to be seen whether or not specific management practices in congregations influence the perception of effectiveness in the same way as it does for NPOs in general.

**CHURCHES AND SYNAGOGUES**

The preponderance of organizational research that includes religious congregations does so mostly with churches of various Christian denominations with much emphasis on Christian belief and Christian world view. One team of researchers eliminated Jewish congregations from their study of church giving citing difficulty due to “definitional problems” (Hoge and Yang, 1994, p. 125). Indeed there are differences between Christian and Jewish congregations in the way in which they define themselves, their members, and their effectiveness. For example, where some Christian congregations define membership based on who attends worship services and/or participates in the life of the congregation, Reform Jewish congregations define as members those who pay annual dues. Dues levels may vary with ability to pay, but nevertheless, in order to be considered a member of a congregation, some arrangement for dues and membership is made through the synagogue office. A person could attend Sabbath services at a given synagogue every week over an extended period of time and never be counted as a member if no official dues arrangement had been made with the office. And conversely, Jews who are dues-paying members of a synagogue may not attend worship services at all or participate in any synagogue activity, but as long as they are current in their dues, they are considered members in good standing.
Another such area of difference between Christian and Jewish congregations is the role of missionaries. A Christian congregation may define its success in terms of the number of missionaries it is able to send into the field and the number of conversions that take place. In Jewish congregations there are no such persons — proselytizing is not a Jewish act. Synagogues do not engage in missionary work — some even discourage conversion.

Another measure of success in a church might also be the amount of money collected at a Sabbath worship service. Synagogues do not “pass a plate” for contributions during a worship service. In some congregations it is considered forbidden to handle money on the Sabbath; for others it is only considered disrespectful to do so. Dues collection is handled on business days through the office and fund-raising efforts do not generally take place at all on the Sabbath.

The emphasis on the “here” versus the “hereafter” influences the language used to describe different expectations and behavior for Jews and Christians. In Judaism the focus is not on living to gain access to a heavenly afterlife, but on living in accordance with Biblical law during one’s lifetime because it is commanded. (In Reform Judaism these dictates are not interpreted literally, but as allegorical guides to living in a contemporary world.) Jewish congregations are likely to discuss behavior expectations in terms of mitzvot (commandments) and brit (covenant between God and the Jewish people), social action efforts in terms of tikkun olam (repairing the world), and religious education in terms of insuring a Jewish future l’
dor v’dor (from generation to generation).
Most of the surveys and scales that have been developed for congregations are replete with Christological references, such as comments regarding the divinity of Jesus, saving souls, evangelism, and concepts of afterlife (McGaw, 1979; Perry & Hoge, 1981; Dudley & Cummings, 1983; Hoge & Yang, 1994). Use of these surveys with Jewish congregations would create a level of discomfort for the respondents. Instruments of measurement expressing concepts in Jewish terms and focusing on the way things are done in Jewish congregations are needed for use with Jewish congregations.

While both Christians and Jews are seeking spiritual, educational, and social experiences and opportunities to express their faith when they participate in congregational life, the “definitional” differences may be great enough that perception of effectiveness for Christian congregations may not be true for Jewish congregation and vice versa. Therefore, one cannot assume that research results that are based solely on perceptions of members of churches will generalize to synagogues. There is a need to study and measure perceptions in Jewish congregations using tools designed specifically for Jewish congregations.

CONGREGATIONS AS MEMBERSHIP ORGANIZATIONS

By virtue of the way in which Reform Jewish congregations are governed, they can be described as membership organizations. Anthony and Young define membership organizations as those “whose purpose is to render services to their members” (1994, p. 72). Unlike the “traditional” model of governance in which an organization’s guardians
provide services to consumers or beneficiaries, in the membership model “the beneficiaries are not ‘third parties’ identified as having a social need, but the ‘guardians’ themselves” (Harris, 1994, p. 5-6).

As membership organizations, congregations are usually dependent on their members as financial and human resources. This is certainly true of Reform Jewish congregations. As a human resource, the members provide the bulk of the work that takes place in congregation life. Most congregations function with a small paid staff, the number of employees being determined by the congregation’s size, needs, and finances. The members govern, chair committees, participate in programs, and generally function as unpaid staff. As financial resources, members function in two ways – providing income to the congregation in the form of their annual commitment (dues) and acting as fund-raisers, developing and staffing projects that are designed to bring in additional monies. While some congregations have foundations, well funded by endowments contributing substantially to their budgets, most rely heavily on dues income from members. Reform Jewish congregations do not receive funds from a centralized organizational structure. In fact, quite the opposite is the case. They pay an annual commitment to the umbrella organization, UAHC, to be considered an affiliate. Therefore, the monies necessary to support the staff, building, programs, and affiliations of the organization must come from member dues or other fund-raising efforts done by the members.

Thus, the members are the most important resource for the congregation in the dues they pay, the funds they raise, and the volunteer leadership and service they provide.
The very survival of the congregation is dependent on the commitment of the members in time, effort, and dollars. If Reform Jewish congregations are to continue to exist, providing the means to educate each generation and insuring the future of Judaism, the members of the congregation must believe in the synagogue’s ability to deliver services. They must be committed enough to give of their time and their money.

What happens to that commitment when a congregation’s effectiveness is diminished? It is likely that, over time, a discontented membership will be reluctant to provide the money and effort that the congregation needs to exist. When this situation arises, the leaders may look for ways to improve the congregation’s effectiveness and may want to identify the factors in management that have been demonstrated to be associated with more effective functioning. They may look for instruments that will provide some information regarding their members’ perceptions of the management practices of their congregation.

LEADER/MEMBER STATUS IN REFORM JEWISH CONGREGATIONS

As described above, in member organizations, members serve as volunteer leaders as well as being those who are served by the organization. In Reform Jewish congregations, there is generally a constituted nomination and election process with members serving as officers and board members for a specified and limited number of years. Most congregations have a system of committees with members, sometimes board members, serving as committee chairs. In additions, many congregations have auxiliary organizations such as brotherhood, sisterhood, young adults organizations, and youth
groups. These auxiliary organizations usually have separate boards and organizational structures. Congregations beyond the smallest ones usually have some paid staff, generally small in number compared to the volunteer workers.

The staff, officers, and board members usually have greater access to the organization’s information than do members who are not part of this “inner circle.” It is not clear how these status positions, being a leader or a member not in leadership, influence perception of management characteristics and effectiveness in Reform Jewish congregations. There is need to investigate the role of status on such perceptions.

SUMMARY

Using as subjects members of Reform Jewish congregations makes this study unique. This research will deal entirely with such individuals, approaching the issue of functioning from a Jewish perspective, using Jewish references, Jewish language, and Jewish practices. Thus, this study will provide useful survey instruments for administrative leaders and consultants for congregations of various Jewish denominations and for religious denominational offices who work to develop congregations that are able to deliver services in the most effective way.

This study will be useful in identifying the relative importance of some of a congregation’s management practices in contributing to organizational effectiveness. Use of these questionnaires will help leaders of congregations gain insight into the way their practices are perceived by the members they are serving and the ways in which the members’ perceptions differ from their own. This study provides some insight into the
applicability to religious congregations of the nonprofit organization research regarding the role of some specific management practices in contributing to effectiveness.

Furthermore, the study will provide social workers and administrators dealing with other types of nonprofit organizations with greater understanding of the generalizability of the collective knowledge regarding the relationship between organizational effectiveness and the specific management practices included in this study.

The survey instruments developed in this research project seek to answer the following questions: In Reform Jewish congregations...

1. Does knowledge of the combination of the practices of shared vision, board development, self-evaluation, and member empowerment predict reputational effectiveness from the leader perspective?

2. What is the relative contribution of each of these four management practices to the prediction of reputational effectiveness from the leader perspective?

3. Does knowledge of the combination of the practices of shared vision and member empowerment predict reputational effectiveness from the member perspective?

4. What is the relative contribution of these two management practices to the prediction of reputational effectiveness from the member perspective?

5. Are there differences in leader and member perceptions regarding the management practices of shared vision and member empowerment?

6. Does an individual’s member/leader status influence the prediction of reputational effectiveness?
CHAPTER 2

LITERATURE REVIEW

THEORETICAL PERSPECTIVES

There is no single comprehensive theory of organizations. In 1980 Ulrich and Weiland wrote, “Today there are numerous theories: each has gained limited support from research studies; each has been shown to be useful in one context or another; and none has been verified” (pp. 13-14). The same is true today. With an abundance of theoretical points of view from which to approach congregational effectiveness, it is difficult to find from among them one, standing alone, that explains the effectiveness of religious congregations in a meaningful way. While each of the theories adds to understanding of the organizational effectiveness of congregations and some are complementary, “they are not pieces of a puzzle that can be fitted together to form a whole (Ulrich & Weiland, p. 14). Nevertheless, several theoretical models can be utilized to form a basis for understanding congregational effectiveness.
EFFECTIVENESS IN NONPROFIT ORGANIZATIONS

After reviewing twenty years of literature regarding nonprofit organizational effectiveness, Forbes (1998) described four approaches that have been used to explain the concept of effectiveness and in the measurement of effectiveness. These are the goal-attainment approach, the system resource approach, the multidimensional approach, and the reputational approach.

The goal-attainment approach was based on the assumption that organizations’ goals are identifiable and unambiguous. This approach defined effectiveness as the extent to which organizations succeeded in meeting their goals...The system resource approach, on the other hand, defined effectiveness as viability or survival. It measured effectiveness with reference to organizations’ abilities to exploit resources from their environments, using political, institutional, and economic means to sustain their own functioning...Multidimensional approaches measured effectiveness in several different ways simultaneously, often incorporating measures based on both the goal-attainment and system resource approaches...The reputational approach measures effectiveness according to the self-reported opinions of some set of persons, usually clients, staff, or outside professionals who are familiar with the organizations at hand. (p. 185-186)

Nonprofit organization goals are often unclear and ambiguous and the construct of effectiveness is elusive (Forbes, 1998; Herman and Renz, 1998). Not only can the members and leaders of an organization be unsure of the goals of the organization, but the criteria by which they determine their own judgement of effectiveness may vary (Bell,
Judging effectiveness solely on the basis of inputs or outputs does not address the complete picture of the operation of the organization. Even combining the goal-attainment approach and the system resource approach does not address the changing, dynamic nature of the organization and the processes that take place in its operation.

Applying commonly used measurement principles to religious congregations is particularly difficult. Anthony and Young state “religious organizations have a particularly difficult problem in deciding on the programs to be undertaken and in measuring the value of services rendered. (‘Souls saved per pew hour preached’ is not a feasible measurement!” (1994, p. 72).

Rapp and Poertner (1992) discuss effectiveness in terms of five performance measures – client outcomes, productivity, resource acquisition, efficiency, and staff morale. Applying these concepts to Jewish religious congregations in which the managing board (leadership) is comprised of members of the congregation (clients), objective measurement of performance is problematic. Regarding client outcomes, determining how membership in the congregation impacts the life of members cannot readily be measured. Rapp and Poertner list five outcome measures – affective changes, learning, behavior changes, status maintenance or change, and environment modifications. Even though religious congregations seek to make changes in the way their members feel and behave, in what they know, to influence the quality of their lives, and to constructively impact their communities, congregations have no way of quantifying their performance regarding these changes. Because there is no entrance evaluation administered when a person or family joined the congregation, there is no baseline data with which to compare. Further, it is
difficult to objectively measure changes in such subjective concepts as a congregant’s sense of self-actualization, sense of community, understanding of Jewish theological perspectives, status, or quality of relationships with others.

Productivity as described by Rapp and Poertner is also not amenable as a means of performance measurement in congregations. They state that productivity is usually measured in units of service. Just what is a unit of service in a congregation? A sermon? A counseling session? A program? A choir practice? A sisterhood meeting? Many programs and activities are lay led; do they count as services rendered? If one used the number of members in a congregation as a measure of productivity (or as a resource acquisition, since members are also a resource), one would have to be aware of the various other factors contributing to the size of a congregation. How many Jews live in the community? Are there other congregational choices available in the community? Are the Jews in the community willing to cross denominational lines in their choice of synagogues? Is the dues level flexible enough to accommodate families in differing income ranges? However, changes in the number of members of a given congregation may reflect level of satisfaction with synagogue, its management, its clergy. Increases in membership may indicate that Jews not affiliated with the congregation are hearing positive descriptions of synagogue experiences and are seeking to be a part of such a congregation. Decreases in membership may indicate dissatisfaction among members to the point of resigning their membership. The inability of the synagogue to attract new members would retard growth. If this inability is due to dissatisfaction among current or resigned members, it could be a measure of performance.
Another measure of performance described by Rapp and Poertner is staff morale. The central staff figures in a Reform Jewish congregation are the rabbis and in some cases cantors, i.e., the clergy. Attracting and retaining clergy is central to perceptions of a congregation’s well-being. Staff morale may be reflected by frequency of turnover of clergy. But it may also reflect other factors such as the inability of the various constituent groups in the congregation to agree on the choice of religious leaders. On the other hand, it may be a reflection of the clergy’s mind set regarding the congregation and the community in which the congregation is located. Many Jews, including rabbis and cantors, prefer to live in major urban areas, in cities with a sizeable Jewish community. Many small and medium sized congregations are considered “stepping-stone” congregations for rabbis, i.e., congregations where rabbis spend a few years early in their career to gain experience before moving to congregations with larger memberships. It is accepted that the rabbis serving these congregations will only stay for a few years, resulting in a frequent turnover of staff. Therefore, frequent turnover alone cannot be a measure of performance. It must be part of a broader understanding of life in the particular congregation.

To use the criteria suggested by Rapp and Poertner, one would need to rely on the subjective evaluations of individual members of their experience with the congregation and its effect on their lives or the evaluation of knowledgeable individuals outside the congregation. Rather than a measure of client outcomes, productivity, efficiency, and staff morale, the evaluation is best described as a measure of reputational effectiveness as described by Forbes.
In their study of nonprofit organization effectiveness, Herman and Renz (1997) concluded “The idea that there is a single objective organizational effectiveness independent of the judgements of various stakeholders is no longer tenable or useful” (p. 202). A framework with some aspects of all of these various approaches including inputs, outputs, and reputation in a dynamic, process-oriented relationship is needed. The combination of two perspectives that has appeared in recent literature, the multiple constituency model supplemented by a social constructionist approach, meets this need.

SOCIAL CONSTRUCTIONISM PERSPECTIVE

If the evaluation of organizational effectiveness varies from stakeholder to stakeholder (as is discussed below), on what are these constituents basing their evaluations? In reality these evaluations are subjective; the evaluations of a congregation’s effectiveness are rarely based on measurable criteria but on the judgements of the stakeholders. “Effectiveness is judgement” (Herman, Renz, & Heimovics, 1997, p. 375). The theoretical base of a survey dealing with congregational effectiveness must recognize the subjectiveness of the evaluation. The recognition of the subjective nature of the evaluations does not reduce the credibility of evaluations; rather it establishes the importance of the subjectiveness of those evaluations. Social constructionism is “an ontological perspective” which “considers reality or some parts of reality to be created by the beliefs, knowledge, and actions of the people” (Herman & Renz, 1998, p. 26). The emphasis is “on processes and emergent meanings” (Herman & Heimovics, 1990, p. 23).
This creation of reality is invented collectively; there may or may not be agreement as to the nature of the reality. Using the analogy of the parable of the blind man and the elephant, Herman and Renz write:

The analogy implies that effectiveness is a real thing that may be perceived in partial and thus different ways. The social constructionist view, however, says there is no elephant at all. Rather, different people look for different things and what they 'see' is determined by a social process. (p. 26).

There is no independent organizational effectiveness (Herman et al., 1997). The judgments are formed in an “ongoing process of sense-making and implicit negotiation” (Herman & Renz, 1998, p.26) in which the stakeholders may not be fully aware of their criteria or informational basis they are using to reach their judgements.

In describing an approach to evaluating effectiveness that he equates with social constructionism and identifies as the emergent approach, Forbes (1998) states “assessments of effectiveness are not regarded as objective facts but neither are they regarded as arbitrary or irrelevant. Rather, the emergent approach, holds that definitions and assessments of effectiveness have meaning but that the meaning is (a) created by the individual or organizational actors involved, (b) specific to the context in which it was created, and (c) capable of evolving as the actors continue to interact” (p. 195). He goes on to say “emergent studies are distinctive in that the theoretical significance of the assessments they conduct derives not from their capacity to actually represent organizational effectiveness but rather from their potential to illuminate the way effectiveness is conceived, negotiated, and measured in the contemporary nonprofit
world” (p. 195-196). From his literature review regarding nonprofit organization effectiveness, Forbes concludes that the role of human information processing in organizational activity is the most distinctive aspect of the studies based on emergent (social constructionist) thinking. These studies emphasize the cognitive aspects of organizational behavior in attempting “to understand organizations as interpretive systems” (p. 196).

**MULTIPLE CONSTITUENCY MODEL.**

The multiple constituency model, as described by Herman and Renz (1997), “recognizes that organizations have (or comprise) multiple stakeholders or constituents who are likely to differ in the criteria they use to evaluate the effectiveness of an organization” (p. 187). In their study of nonprofit organization effectiveness, Herman and Renz found that different constituencies judged organizations in different ways. They compared the organizational effectiveness judgement scores and the board effectiveness judgement scores as judged by board members, staff members, and funders of 64 publically supported nonprofit organizations with paid staff. They did not include member-benefit organizations or volunteer organizations in their sample. They found little or no agreement in effectiveness judgements among these three constituent groups. They state that these differences “imply that there is not a single organizational or board effectiveness ‘out there’ that stakeholders perceive similarly but that each group creates effectiveness on the basis of criteria and impressions mostly relevant to it” (p. 196). Herman and Renz did not report a comparison of the effectiveness judgement scores of
the board members, staff, or funders to an external knowledgeable person or group to
determine the level of agreement of each of the constituent groups with an outside source
of a reputational effectiveness rating.

D’Aunno (in Hasenfeld, 1992) describes the multiple constituency approach
stating:

an organization is effective to the extent that it at least minimally satisfies the
interests of multiple constituencies associated with it. The common underlying
assumption of multiple constituency approaches is that organizations depend on
various groups for resources, and ultimately, for survival. (p. 346)

In his evaluation of multiple constituency approaches, D’Aunno states that using a
multiple constituency approach requires two steps — identifying the constituents and
assessing the satisfaction of the constituents with the organization’s performance.

Because the judgements are based on the values and preferences that are held by
individuals and groups, D’Aunno enumerates some problems in applying the multiple
constituency in research:

(1) Values and preferences vary from one group to another, and it is difficult to
resolve such conflicts.

(2) A group’s preferences are sometimes difficult to identify, even for the group
itself.

(3) Preferences vary over time.
Contradictory preferences are sometimes held by a group.

How to identify constituents to participate in an assessment is often ambiguous. (p. 350)

Nevertheless, D’Aunno states that the multiple constituency model is pragmatic, provides flexible guidelines that are adaptable to a variety of circumstances, and takes diverse groups of constituents into account. He suggests the use of multiple constituency approaches to “draw comparisons about relative effectiveness of several organizations of a given type” (p. 350). As stated by Herman and Renz in a later report (1998), “Given the nature of NPO’s, the multiple constituency model must be part of any approach to understanding their effectiveness” (p. 26).

Assessing organizational functioning using leaders and members as constituent groups is grounded in theory and research. Becker, in his discussion of bias in research and a “hierarchy of credibility,” describes the usual source of gaining knowledge regarding an organization:

In any organization, no matter what the rest of the organization chart shows, the arrows indicating the flow of information point up, thus demonstrating (at least formally) that those at the top have access to a more complete picture of what is going on than anyone else. Members of lower groups will have incomplete information, and their view of reality will be partial and distorted in consequence. Therefore, from the point of view of a well socialized participant in the system, any tale told by those at the top intrinsically deserves to be regarded as the most
credible account attainable of the organizations’ workings...Thus credibility and
the right to be heard are differentially distributed through the ranks of the system.

(1967, p. 241)

Becker then discusses the necessity for researchers to question this hierarchy of credibility.
In “political” organizations, “it becomes a matter of argument [as to] who has the right to
define reality” (p. 244) Both points of view are not only credible, but necessary to
understanding the effectiveness of the organization. If the leaders of a congregation
report that their organization is effective in serving the needs of its members and the
members do not report that they are being served effectively, can the organization be
deemed effective? As Becker states, “officials develop ways both of denying the failure of
the institution to perform as it should and explaining those failures which cannot be
hidden. An account of an institution’s operation from the point of view of subordinates
therefore casts doubt on the official line and may possibly expose it as a lie” (p. 243)

Cafferata (1979) found differences in satisfaction rating percentages between
leaders and members of a professional association (no significance level reported), with
leaders reporting greater satisfaction. She states “social location as leader or member
appears to affect one’s perceptions of the organization...” (p. 482).

To ignore the judgements of any major constituent group would result in an
incomplete picture of the organization’s functioning. The very dependence of
congregations on volunteer work speaks to the necessity of including both leader and
member constituent judgements. Given that congregations are dependent on members as
financial and human resources, the selection of participating constituent groups must
include not only leaders (professional staff, board presidents, board members, auxiliary group presidents), but also members of the congregation not currently serving in leadership positions, all of whom are financial supporters and volunteers or potential volunteers. Having information about both leader and member perceptions regarding management practices and effectiveness helps to paint a meaningful picture of the congregation’s functioning.

THEORETICAL APPROACH OF THIS STUDY

Looking at congregations through the combined lenses of social constructionism and a multiple constituency model is most meaningful for the purpose of differentiating between more effective and less effective congregations. The congregations’ various constituent groups will perceive effectiveness based on their own set of beliefs, needs, and experiences as they “live” in the congregation. This proposed research will depend on the evaluations of two groups of stakeholders in the congregations – leaders and members. Understanding that these evaluations have meaning as individual as the stakeholders is essential to understanding the results of the research.

EMPIRICAL PERSPECTIVES

A review of the literature dealing with nonprofit organizations reveals a number of factors that appear to be strongly associated with organizational effectiveness. Among
these factors are shared vision, board development, board self-evaluation, flow of information and distribution of power (member empowerment). A compilation of the results of research in each of these areas is reported here.

EFFECTIVENESS AND SHARED VISION

There is much discussion in the literature regarding the importance of shared vision and the value of planning. Whether the remarks or research deals with mission statements, aspiration statements, strategic planning or the setting of long- and short-term goals, there is general agreement that the leaders of more effective organizations engage in the process of identifying the organization’s direction, establishing goals, and planning for the accomplishment of the goals. These processes appear to be very necessary ingredients for an organization to thrive. Carver (1997), states the strong case for clarity of mission and also the process by which it is determined:

The most important work of any governing board is to create and re-create the reason for organizational existence. This is not simply the approval of a purpose statement. Nor is this a task done once, then forgotten. It is a perpetual obligation, deserving of the majority of board time and energy. It is far more important than any other board task, including budgets, personnel issues, risk management, and even the choice of a chief executive. (p. 50)

Using both subjective and objective measures of performance, Bradshaw, Murray, and Wolpin (1992) researched the relationship between organizational processes and measures of organizational performance. Based on 417 completed questionnaires sent to
executive directors of nonprofit, voluntary organizations, they found eleven of thirteen
process measures to be significantly related to the board effectiveness performance
measures. Four of these dealt with vision and planning. The four processes are common
vision shared by board, origin of vision with top paid manager, origin of vision with top
voluntary leader, and strategic planning by the board. Nine of thirteen process measures
were significantly correlated with subjective organizational performance. Bradshaw et al.
also examined the relationships among the thirteen board processes and found a strong
positive correlation between the extent to which the board engaged in strategic planning
and the extent to which the board members share a common vision of the organization
($r = .63, p < .001$). It is also interesting that they found significant negative correlations
between conflict experienced by the board and sharing a common vision ($r = -.51, p < .001$)
and between conflict and strategic planning ($r = -.54, p < .001$). It appears that boards
sharing vision and goals – a common sense of purpose and direction – have less issues on
which to disagree. Among other relationships, they found that boards scoring high in
general satisfaction were more likely to have engaged extensively in strategic planning
($r = .64, p < .001$) and to share a common vision ($r = .55, p < .001$). Based on the regression
analysis, Bradshaw et al. state “a high emphasis on strategic planning emerges as the single
most important process characteristic (accounting for 30 percent of the variance)” in
perceived board effectiveness (p. 245). Furthermore, they found that “boards that
emphasize strategic planning are most successful in avoiding deficits” (p. 246).

In their study of 39 voluntary, nonprofit organizations, Smith and Shen (1996)
report greater reputational effectiveness as being significantly related to having a formal
mission statement “regularly created by the board” \( (t=3.46, p<.01) \) (p. 282). Having a formal mission statement ranked third in explaining the variance predicting reputational effectiveness in the regression analysis (following having by-laws available and having many active committee members).

Using a combination of goal and resource approaches to investigating effectiveness, Green and Griesinger (1996) studied the relationship between organization performance and organizational effectiveness in sixteen organizations. They surveyed the CEOs and board members of the organizations they studied. Based on reports from CEOs, they found boards of more effective organizations to be more involved in policy formation \( (r=.53, p<.05) \) and long- and short-term strategic planning \( (r=.67, p<.01) \) than were boards of less effective organizations. The responses from board members, while showing positive correlations between the variables of involvement in policy formation and strategic planning with effectiveness, were not significant.

In her study of twenty YMCA organizations using the results of 240 questionnaires, telephone interviews, on-site visits, and reviews of board minutes, Siciliano (1997) examined the relationship between formal planning activities and organizational performance. She found positive and significant relationships between performance and the following activities:

- Social performance and setting long-term goals \( (r=.2898, p<.01) \)
- Social performance and setting short-term goals \( (r=.3343, p<.01) \)
- Social performance and having action plans \( (r=.2266, p<.01) \)
- Social performance and monitoring results \( (r=.2884, p<.01) \)
Financial performance and setting long-term goals ($r=.1753, p<.01$)

- and setting short-term goals ($r=.1061, p<.10$)
- and having action plans ($r=.1020, p<.10$)
- and monitoring results ($r=.1304, p<.05$)

In Siciliano’s study, the specific process of developing a unique mission statement was not associated with either financial or social performance. Perhaps the nature of YMCA organizations, all being related to a central organization, is such that having a *unique* statement of mission is not related to performance.

The importance of process in the activity of planning is discussed by Rogers and Ballard (1995) who state:

More important than its content is the process by which the statement was created...Including all voices in creating the aspirations by which an organization operates and continually reviewing the statement for its appropriateness to the current context and membership are important to making the aspirations statement a meaningful and ethical approach to decision-making. (pp. 167-168)

Thus, there is a substantial body of evidence that clarity of mission and goals, representing shared vision and values, that are determined in an inclusive process and used in decision-making and to evaluate progress toward goals, contributes to organizational effectiveness.
EFFECTIVENESS AND BOARD DEVELOPMENT

Board development has been another focus of attention among researchers of nonprofit organization effectiveness. The concern centers around the apparent lack of understanding among board members regarding their role and the lack of board training and education. Weiss and Wynn (1980) in their review of the literature regarding functions and responsibilities of boards of trustees of nonprofit organizations state that there is general agreement by most authors on the major functions of a board. They list determination of policy, allocation of resources, appointment and evaluation of an executive director, and public relations as the most frequently cited functions. Caparosa (1984) describes the responsibilities of board members as including “legal, fiduciary, and moral obligations to the organizations they govern” (p.42). In their survey of the volunteer directors from ten nonprofit boards, Siciliano and Spiro (1992) found that 71.6% of the respondents were unaware of their liability. “Many people who volunteer for governance positions are unaware of their potential liability. In fact, director apathy has frequently been cited as a characteristic of nonprofit boards” (p. 69). They concluded with suggestions for reform including education programs for the board, especially pertaining to director responsibilities. Another dismal description of boards is stated by Gibelman, Gelman, and Pollack (1997): “We suggest that many nonprofits totter on the brink of serious problems, if not disaster” (p. 31). Included in their list of symptoms of these boards are “board members who are unprepared for meetings and who fail to keep abreast of organizational developments” and “lack of clarification of the respective roles of board and staff” (p. 32).
In testing the sensitivity of a new instrument developed to assess board performance, the Board Self-Assessment Questionnaire (BSAQ), Jackson and Holland (1998) investigated six dimensions including an educational dimension. They describe this educational dimension as: “The board takes the necessary steps to ensure that members are well informed about the organization and the professions working there as well as the board’s own roles, responsibilities and performance” (p. 160). (The other dimensions were contextual, interpersonal, analytical, political, and strategic.) With an intervention focused closely on education mostly addressing goals and action plans, they tested for rates of change in organizational indicators in pre- and post-interventions scores. The educational and interpersonal dimensions were found to be the strongest correlations \(r=.36, p<.04\) for each.

Board members themselves feel the need for more information. In their study regarding board member influence, Herman and Tulipana (1985) found a positive though not strong, relationship, between the extent to which board members feel informed of their duties and their perception of their own influence in their organizations \(F=4.86; df=2,58; p<.02\). Cook and Brown (1990), in their research to identify variables discriminating between more effective and less effective nonprofit human service agencies, discuss the policy making role of boards and describe the less effective trustees as appearing to have taken on the responsibility of day-to-day management. They conclude that “Boards need to have training to understand the mission and work of the agency and the expectations for board members” (p. 445)
Green and Griesinger (1996) studied board effectiveness using a questionnaire administered to CEOs and to board members. Among the factors found to be significantly correlated to organizational effectiveness was board involvement in board development. Boards of effective organizations were more fully involved in board development than were boards of less effective organizations. “From the CEOs perspective, board development proved to be one of the most significant areas distinguishing effective organizations from less effective ones. In particular, boards of effective organizations were more actively engaged in training new board members \( [r = .79, p < .001] \) and setting specific duties of board members \( [r = .55, p < .05] \) than were boards of less effective organizations” (p. 396). From the perspective of board members, the training of new board members was significantly correlated with organizational effectiveness \( (r = .54, p < .05) \). Setting specific duties was correlated in the same direction as the CEO responses, but was not statistically significant.

Smith and Shen (1996), comparing nonprofit organizations with paid staff to volunteer nonprofit groups and using reputational effectiveness as a measure of nonprofit organizational effectiveness, studied board governance and tested fifteen factors for a relationship to effectiveness. Of the fifteen only four were significant. The factors that showed the strongest relationship to organizational effectiveness were knowing the by-laws \( (t = 2.37, p < .05) \) and good attendance at board meetings \( (t = 2.05, p < .05) \). Among the factors found not to be significantly related to effectiveness was formal board orientation. While this last result may, at first, seem contradictory to that of the other research described here, it is possible that a formal board orientation, followed by little other effort
at board development is not particularly meaningful. Dedicated interest demonstrated by regular attendance at meetings and organizational knowledge including an understanding of the by-laws may be of greater importance.

Responding to the need for board development, Holland, Leslie, and Holzhalb (1993) examined 22 boards of nonprofit organizations, some of which were highly effective and some having notable dysfunctions. Their approach to board development focused on organizational culture, which they describe as customary practices, shared beliefs, and assumptions underlying and organizing behavior. They identified two general areas of transmission of organizational culture, formal and informal. They describe formal transmission as taking place in orientation sessions, emphasizing “the official mission and goals of the organization, the recognized duties and responsibilities of members, and the rules regarding the way to conduct meetings, appropriate channels of communication, allocations of tasks to various committees, and expected forms of dealing with responsibilities” (p.143). Holland et al. then drew from the practices of the more effective boards to recommend methods for strengthening the board performance through field tests with twelve of the boards. They found board retreats to be a valuable means to transmit organizational culture. The boards that engaged in retreats, reflecting together on their own patterns of behavior and value assumptions, demonstrated the most extensive changes. These “groups began practicing more satisfying ways of dealing with issues, based on clearer shared assumptions” (p. 152).

Two other authors stress the importance of continuous board development. Rogers and Ballard (1995) describe education and training as the foundation of
empowerment and assert that “this education and training is not viewed as a luxury for when time is available or at the annual retreat. Education and training are continuous, participatory, and organization wide” (p. 172). Gibelman, Gelman, and Pollack (1997) state the case for systematic and ongoing board training as being...

essential to knowledgeable governance. Elements of an effective board development program include orienting new and continuing board members on an annual basis, providing continuing education in policy making, and promoting continuous opportunities for the board to assess its own performance and that of the organization. (p.36)

EFFECTIVENESS AND SELF-EVALUATION

Evaluating programs and performance of the board is another area of discussion regarding organizational effectiveness. In the Holland, Leslie, and Holzhalb (1993) study of the culture and patterns of 22 more effective and less effective boards, they describe the patterns of more effective boards regarding evaluation of performance:

A significant distinction was that the more effective boards directed attention to their processes for dealing with issues as well as the substance. After struggling with difficult problems and coming to conclusions, these boards often took some time to reflect together on what they could learn from how they had dealt with issues, what assumptions had guided those efforts, and what might be done differently to improve their future efforts. (pp. 148-149)

38
Patterns of less effective boards were described as follows:

[Less effective] boards seldom raised questions about their own performance or did so only under the duress of some crisis in the organization, such as declining income, public embarrassment, substantial loss of market share, or the need to replace the CEO. At such times, board members found themselves struggling with diverse individual interests, competing demands from coalitions of members, challenges from constituency representatives, or threats to public credibility and support. Typical attempts to contain the disruption included finding the least stressful of familiar solutions and searching for answers within the accepted framework of assumptions and practices. Often the result was blaming some individual (a member of the staff or board) for failure and expecting that finding an acceptable replacement for him or her would solve the problem. (p. 147-148)

Green and Griesinger (1996) found significant positive correlations between organization effectiveness and scores given by CEOs for monitoring services and programs ($r=.63$, $p<.01$) and formally evaluating board performance ($r=.62$, $p<.01$). Also using CEO scoring, they found the correlations for reassessing the organization’s overall performance and reviewing management information to be positive but not significant. Using scoring done by board members, the Green and Griesinger study revealed positive and significant correlations for reassessing the organization’s overall performance ($r=.60$, $p<.05$) and reviewing management information ($r=.76$, $p<.001$). CEOs linked formal evaluation of board performance with organizational effectiveness but board members did not. Board members linked reassessing the organization’s overall performance with organizational
effectiveness but CEOs did not. It is apparent that which specific areas of evaluation are important in relation to organizational effectiveness depends on who you ask. This supports the thinking that there is need to include various stakeholder groups when seeking to understand an organization’s effectiveness.

EFFECTIVENESS AND POWER

While power may be legitimated both formally and attributionally, it is the use of power and the balance of power that is often the cause for concern in organizations. Harris (1994) writes of the tension resulting from the lack of clarity regarding the power of boards. She attributes these tensions to organizational history, the interdependence of board and staff, and the multiplicity of constituencies. She further describes the variations of the power relationships based on the model of governance of the organization — traditional, membership, or entrepreneurial. Congregations, being membership organizations, have a “closed circle” (p. 5) linkage between the organization’s guardians (those with positive concern for the organization’s long-term survival) and the organization’s beneficiaries (those served by the organization). In the membership model, the beneficiaries are the guardians themselves. Harris describes the power struggle between board and staff in this model stating the professional staff “may resent the threat to their ability to exercise professional judgments which is implicit in a situation in which ‘clients’ are also employers and managers” (p. 8). Secondly she describes the frequent
contact between guardian/benefactors and the staff as resulting in a perception that the board is unnecessary or intrusive. The influence of current beneficiaries can lead to the board’s inability to control staff or engage in long-term planning.

It is this relationship, the tension, between the board and the executive director of nonprofit organizations that is addressed by Leduc and Block (1985):

Nonprofit organizations generally maintain fuzzy lines of management responsibility. In fact, the ambiguity of assigned responsibility in nonprofit organizations often leads to staff and/or board concerns about the parameters of tasks assigned to both paid and unpaid personnel. Furthermore, serious tension in the nonprofit organization is a common outcome when volunteers and staff are unclear about the boundaries of their assignments. (p. 67)

Leduc and Block make the connection between power and the ability to control the flow of organizational information. “Intentionally or unintentionally, the executive director can influence the policy decision capability of the board by either stressing or withholding certain information” (p. 72). Pfeffer (1992) writes:

There is little doubt that information and the certainty that it can provide, is a source of power. It can be used as part of a very important political strategy — getting one’s way through analysis...[This] means that those in control of the facts and the analysis can exercise substantial influence. (p. 247).

Given the availability of multiple bases for making a decision, one strategic use of power and influence involves advocating the employment of standards that favor one’s own position. (p. 258)
Of course, employing information selectively means strategically ignoring
information that does not advance one's own point of view. (p. 260)

Studying 50 chief executives of nonprofit organizations, Herman and Heimovies (1990)
found that the reputationally more effective CEOs engaged in board-regarding behaviors
to a greater extent than the comparison CEOs. Among these behaviors was the provision
of information to the board. “Nearly all the effective CEOs in this study mentioned the
crucial importance of providing information to their boards” (p. 119).

Information flow is not only a powerful tool for influencing decision making at the
board level, it is also a powerful mechanism for involving the membership. Sherman,
Smith, and Mansfield (1986) describe information flow as the most important factor in
socialization of an organization’s members. They found information flow to be a major
predictor of the level of integration of members with coefficients ranging from .28
(F=3.07, p<.05) to .48 (F=10.79, p<.001). Zalenski, Zech, and Hoge (1994) found a
significant positive correlation between members agreeing that they are well informed and
percent of income contributed to the congregation (r=.22, p<.01). Thus, the power
struggles among the professional leaders, who have access to and control over the
organization’s information, influences the governance of the congregation as well as the
way the congregation is experienced and supported by the membership.

Centralization versus decentralization of power is discussed by McGaw (1979) in
his quantitative and qualitative study of congregational commitment. Comparing a more
liberal mainline Presbyterian congregation with a more conservative charismatic
Presbyterian congregation, using surveys, observation, and interviews, McGaw describes
the mainline congregation as having a more centralized power structure. In this congregation, the pastor was the dominant force, the pastor being involved in every aspect of congregational life including large and small decision making. McGaw describes the charismatic congregation as having a broader base of power, with elected elders performing in the role of assistant pastors. McGaw states “there is some indication that a centralized power structure in a congregation may lower the consensus and therefore diminish the sense of belonging and meaning” (p. 157). McGaw concludes that commitment is stronger in the charismatic congregation than in the mainline congregation with decentralization of authority being one of the contributing elements.

Having access to the power structure could be considered a factor in the distribution of power. Zalenski, Zech, and Hoge (1994) found a significant positive relationship between members feeling they have an equal opportunity to hold key leadership positions and percent of income contributed to the congregation (r=.21, p<.01).

Thus it appears that the more effective organizations are those in which information is shared with the board and in which the flow of information is used to integrate the membership. It also appears that those organizations that have a more decentralized power structure tend to engender greater commitment from their members. The centralization of power and information does not appear to be the most conducive means of developing effective organizations.
SUMMARY

The research investigating organizational effectiveness provides strong evidence that the following organizational behaviors are associated with the more effective nonprofit organizations:

- shared vision in the form of mission statements, goals, and strategies arrived at in an inclusive process,
- boards that engage in ongoing educational experiences,
- boards that engage in ongoing self-evaluation,
- a more decentralized power structure with a membership that is empowered through shared information and access to leadership.

Does the same hold true for religious congregations? If so, how strongly are each of these factors associated with the perception of effectiveness in religious congregations? Furthermore, when the congregation is seen as consisting of constituent groups, is there a difference in the perceptions of those groups regarding these behaviors and regarding organizational effectiveness? How does agreement among constituent groups or lack thereof regarding these behaviors relate to the effectiveness of the congregation?
CHAPTER 3

METHODOLOGY

OPERATIONAL DEFINITIONS

To be consistent with the terminology used in the research regarding the functioning of nonprofit organizations (NPOs), the terms more effective and less effective (as opposed to functional and dysfunctional or healthy and unhealthy) are used to describe the congregations in this research project. However, the construct of effectiveness regarding nonprofit organizations poses a problem. Herman and Renz (1997) discuss the lack of a “simple, objective effectiveness that can be applied to all nonprofit charities” (p. 186). Understanding this construct is complicated by the difficulty in measuring the output of nonprofit organizations. “Nonprofit organizations frequently have goals that are amorphous and offer services that are intangible” and may represent values about which there is little consensus (Forbes, 1998, p. 184). Some researchers have described the effectiveness of nonprofit organizations in terms of the culture of the group. Holland, Leslie, and Holzhalb (1993) describe the culture of less effective boards as defining “problems in terms of conflicting individual interests,” “blaming some individual” (p. 148) rather than considering the contribution of group patterns and
assumptions to the problem. They describe the culture of more effective boards in terms of valuing individuals while considering the board as a group whose interpersonal relations and communication were vital to success. Members of these boards share a “strong ideological commitment to equality and democracy,” are kept well-informed, and encourage and explore multiple perspectives (p. 148).

Other researchers have attempted to identify various other means of determining the effectiveness of nonprofit organizations. The four approaches listed by Forbes (1998) — goal-attainment approaches, system-resource approaches, multidimensional approaches, and reputational approaches — are some that have been used. These were described in the review of the literature.

For the purpose of this study, congregational effectiveness is operationally defined in terms of **reputational effectiveness** which in turn is defined as the opinion of knowledgeable individuals, inside or outside of the organization, regarding the ability of the organization to address the needs of members and/or the mission of the organization. In this study, opinions are limited to those of individuals inside the organization, i.e., members and staff of Reform Jewish congregations. Based on specific items in the survey of congregational leaders, a composite rating of the congregation’s reputational effectiveness for leaders was determined. Based on specific items in the survey designed for members, a composite rating of the congregation’s reputational effectiveness for members was determined.

In this study *leaders* is defined as professionals (rabbis, cantors, administrators) who are employed by the congregation and lay individuals who are currently serving on
the board of directors (or trustees) of the congregation as either officers or general board members. Auxiliary presidents (of brotherhood and sisterhood), whether or not they are considered as board members by their congregation, are defined as leaders. While it is understood that there are many other leadership roles in the congregation life, for the purpose of this study members is defined as individuals who are not currently serving as synagogue staff, officers, synagogue board members, or auxiliary presidents.

For the purpose of this study the constructs under investigation are defined as follows:

**Shared Vision** — Factors in the organization’s management that demonstrate a broad group process of thought and action regarding the reason for the organization’s existence and the organization’s future. Included in this construct are the identification of the organization’s core values and the planning aspects of the organization such as the development of a mission statement, the establishment of long- and short-term goals, outlining strategies by which these goals are to be met, and the process by which mission, goals, and strategies are developed. Also included in this construct is the transmission of information regarding mission and goals to members of the congregation. The leader and member questionnaires each included a set of items regarding these practices and a shared vision score was computed for each leader and member respondent.

**Board Development** — Factors in the organization’s management that demonstrate a desire to educate board members regarding the organization and regarding the role of the board and its members as it relates to the management of the organization. This construct includes practices that are designed to provide board members with
information regarding the organization’s history and its place in its community, the board’s responsibilities to the organization, and individual responsibilities as board members. Because only those participating in leadership will likely be able to respond to questions regarding board development, only the leader questionnaires included a set of items regarding these practices and a board development score was computed for each leader respondent.

**Self-Evaluation** — Factors in the organization’s management that demonstrate a desire to understand the positive and negative results of board decisions and congregation programs through self-examination. This construct includes efforts to review the board’s performance and the performance of the programs and projects that the board develops. Because only those participating in leadership would likely be able to respond to questions regarding self-evaluation, only the leader questionnaire included a set of items regarding these practices and a self-evaluation score was computed for each leader respondent.

**Member Empowerment** — Factors in the organization’s management that promote the ability of the membership to participate in the life and leadership of the organization. This construct includes those aspects of organization life that provide members with a sense of ownership, such as the dissemination of information, the inclusion of members and their ideas in programs and decision making, the accessibility of the organization’s leaders to the members, the ease with which members can be involved and move into leadership positions, and the sense of being valued that is held by members.
of the organization. The leader and member questionnaires each included a set of items regarding these practices and a member empowerment score was computed for each leader and member respondent.

THE RESEARCH QUESTIONS

The empirical evidence addressed in the review of the literature regarding the management of nonprofit organizations in general raises questions about the reputational effectiveness of religious congregations in particular. The review of the literature has shown that various aspects of specific management practices, which are herein described as shared vision, ongoing development of the board, ongoing self-evaluation of board or organization performance, and empowerment of the membership, have been shown to be significantly positively correlated with organizational performance. Do the management practices of religious congregations, specifically Reform Jewish congregations, have the same consequences for effectiveness as do those of nonprofit organizations in general? No data directly answering this question could be found in the review of the literature. Also not found were any established instruments designed to research the specific practices to be examined in this project that would be appropriate for use with Reform Jewish congregations. Because of my belief that knowledge regarding the relationship between reputational effectiveness and these organizational management practices as perceived by leaders and members of congregations will add to understanding why some congregations thrive while others do not, this project was undertaken to begin the
development of such instruments and to observe the relationships of these practices with effectiveness in Reform Jewish congregations. It is my expectation that

1. There will be a positive correlation between these four practices and the reputational effectiveness of these congregations.

2. The views of leaders will differ from the views of members regarding shared vision, member empowerment, and effectiveness.

3. The leader/members status of the respondents will influence the relationships of the management practices and the perceived effectiveness.

In order to learn about the behaviors of congregations, it is the members of the congregations that must be surveyed. Using the social constructionist approach, it is understood that the responses of those members to questions regarding organizational behaviors were the perceptions of the individuals — their construction of the reality. Their responses must be valued as such. The total of their responses provide an overall view of behaviors in the congregation. However, because congregations, like other organizations, are composed of various constituent groups, understanding the functioning of congregations must include information regarding the perceptions of those groups. Thus, the responses must be viewed not only in terms of the congregation as a whole using the sum of the individual members responses, but also in terms of the responses of the members of the constituent groups. In this study for the purpose of questionnaire development, the congregation will be considered as being comprised of two major constituent groups — the leader constituency and the member constituency. The leader constituency represents those “inner circle” congregation members that are more familiar
with the management of the congregation, with what is “going on” than those members who are outside that circle – known here as the members (i.e., those members not currently serving on the board). While these groups can be further subdivided, two questionnaires – one for leaders and one for members – can be used for further analysis of the subdivisions; subdividing the constituent groups is not necessary for the development of these questionnaires.

Because of the different perspectives of synagogue life of leaders and members of congregations, two forms of a questionnaire were developed to answer the following questions: In Reform Jewish congregations...

1. Does knowledge of the combination of the practices of shared vision, board development, self-evaluation, and member empowerment predict reputational effectiveness from the leader perspective?

2. What is the relative contribution of each of these four management practices to the prediction of reputational effectiveness from the leader perspective?

3. Does knowledge of the combination of the practices of shared vision and member empowerment predict reputational effectiveness from the member perspective?

4. What is the relative contribution of these two management practices to the prediction of reputational effectiveness from the member perspective?

5. Are there differences in leader and member perceptions regarding the management practices of shared vision and member empowerment?
6. Does the leader/member status of an individual influence the prediction of reputational effectiveness?

The purpose of this study is threefold: (1) to begin the development of valid and reliable survey instruments specifically designed to examine the four areas of management practices – shared vision, board development, self-evaluation, and member empowerment – in Reform Jewish congregations; (2) to use the data collected to observe the relationships between these management practices and reputational effectiveness; (3) to explore the possible moderator role played by constituent status (leader or member) of the respondent.

**DESIGN OF THE STUDY**

This is a correlational study investigating the relationship among statements regarding synagogue management practices (i.e., items on questionnaires; the indicators) in Reform Jewish congregations and the relationship of the statements to the variables (factors) under observation. These variables are the four independent variables — shared vision, board development, self-evaluation, and empowerment of the membership — and the dependent variable reputational effectiveness, as these variables are perceived by leader and member constituencies of Reform Jewish congregations. Following the development of the two survey instruments consisting of the factor scales, relationships among the independent and dependent variables were explored as was the moderator effect of the constituent status of the respondent.
Importance of synagogue membership was also be explored as a possible moderator variable in the respondents’ perceptions of the congregation. As a possible indicator of commitment to the congregation, this client-centered variable may influence the perceptions of respondents regarding their congregations. Kanter, in her definition of commitment states:

Commitment refers to the willingness of people to do what will help maintain the group because it provides what they need...When a person is committed, what he wants to do (through internal feeling) is the same as what he has to do (according to external demands), and thus he gives to the group what it needs to maintain itself at the same time he gets what he needs to nourish his own sense of self...It forms the connection between self-interest and group interest. (1972, p. 66-67)

It has been shown that commitment manifests itself in greater giving to the congregation (Hoge and Yang, 1994; Olsen and Cadell, 1994). If congregation members are willing to give more money based on their level of commitment to the congregation, it stands to reason that their opinions regarding the congregation may also be influenced by their level of commitment.

SUBJECTS

The Ohio State University Institutional Review Board approved this research project prior to any contact with congregations or individuals. The subjects in this study were individuals affiliated with congregations, both leaders and members. In order to minimize the contribution of differences in ideology, practice, and structure, the
congregations in this study were selected from one religious denominational group. The congregations included in the study were two Reform Jewish congregations both affiliated with the Union of American Hebrew Congregations (UAHC, the Union). The subjects for the leader survey were the rabbis, some other staff members, officers and other board members and the auxiliary presidents (brotherhood and sisterhood). The subjects for the member survey were the members of the congregation not currently serving in these specified leadership positions.

Reform Jewish congregations are congregationally governed, many having both professional and lay leadership. Because UAHC congregations are independent entities, it was necessary to obtain cooperation from the individual congregations to participate in this study. Because I felt that the congregation’s professional leadership needed to be comfortable with participation in this research, the first contact I made was with the rabbi of each congregation. They were contacted by phone and the project was explained. Two rabbis agreed to participation; a third did not. After approval was given by the two rabbis, I contacted the president of each of their congregations (Congregation A and Congregation B described below) by phone and e-mail. The e-mailed letter of explanation

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1 The UAHC is the international denominational organization for Reform Jewish congregations with over 900 affiliates located throughout North America. It has professional and lay leadership. There is a central office located in New York City and a system of 14 regional offices throughout the United States and in Canada. The regional councils are also structured with rabbinic directors and lay presidents and boards. This international structure does not imply that Reform Judaism is “hierarchically governed.” The congregations are independent entities, voluntarily affiliating with UAHC. There is no top-down authority from the international level. The international Union provides many services to local congregations, but has only the power to recommend policy to affiliated congregations.
regarding the research is attached (Appendix A). The presidents then obtained permission of the executive committee or board of their respective congregations to participate in the research. Written statements of agreement to participate were obtained for each congregation (Appendix B). A fourth congregation that was approached is currently beginning a search for a new senior rabbi; the executive committee did not feel that this would be a good time for them to participate in the research project.

The first congregation surveyed is the membership of a mid-western suburban temple with a little over 300 member units or households (referred to here as Congregation A). There are two other Reform temples in nearby communities as well as synagogues of other denominations, an active Jewish Federation, a Jewish community with many organizations and services for Jewish youth and adults. This congregation has been in existence for 25 years and is a "breakaway congregation" from an older, larger congregation. The second congregation (Congregation B) is located in a small mid-western city where it is the only Reform congregation in the area. It was founded 127 years ago and has a little over 200 member units. The community in which this congregation is located has one other Conservative synagogue and a Jewish Community Council that has no facilities. There are no other Jewish organizations.

Because neither congregation is very large, no attempt was made to sample the members; all staff members, officers, board members, and member households were included in the survey.
INSTRUMENTATION

For the purpose of this research, I developed two preliminary Likert scale questionnaires. They were both based on the concept of reputational effectiveness and the constructs under investigation. With the multiple constituency model in mind, one questionnaire was written for the leader constituency and one for the member constituency. I designed the leader questionnaire specifically for the congregation’s lay and professional leaders who have knowledge of the activity at the board level of congregation governance (Appendix C). The leader questionnaire includes items dealing with the dependent variable (reputational effectiveness) and the four independent variables (shared vision, board development, self-evaluation, and member empowerment). I designed the member questionnaire specifically for individuals not serving as board members (Appendix D). It includes items dealing with reputational effectiveness, shared vision, and member empowerment as these factors would be experienced by persons not participating in congregational governance. The variables of board development and (organizational/board) self-evaluation were excluded from this questionnaire due to the likelihood that only members involved at the board level of leadership would be knowledgeable regarding these issues. I selected items for both questionnaires based on information gleaned from social work courses and the review of the literature. Selections were greatly influenced by my personal experience as a volunteer in Reform Jewish congregational, regional, and international leadership.

In order to establish clarity of statements (questionnaire items) and develop face and content validity of the indicators, I presented the items on the questionnaires to four
individuals familiar with Reform congregational life who are either no longer affiliated
with a Reform congregation or whose congregations were not included in this study. Two
of these individuals had congregational leadership experience and two did not. The
individuals were informed of the definitions of the independent and dependent variables
and asked to share any problem they would have understanding the statements or
responding to the statements and the sensibility in regards to the constructs. Statements
were reworded or eliminated based on their responses. These individuals were also asked
for input regarding possible additional statements and some adjustments were made.

To further establish content validity, I submitted the questionnaires to the Vice
President of the UAHC and to the UAHC Director of Synagogue Management for their
input. Both of these individuals are knowledgeable regarding the management practices of
Reform Jewish congregations. They, too, were asked for input regarding items on the
questionnaire and adjustments made.

The resulting 66-item leader questionnaire included 12 shared vision items, 11
board development items, seven self-evaluation items, 26 member empowerment items,
and 10 effectiveness items. The items, arranged in groups based on the variables to which
I believed them to be related, were printed in a questionnaire form. The leader
questionnaire included items relating to all four of the independent variables and to the
dependent variable. The 37-item member questionnaire did not include the variables of
board development or self-evaluation. The 6 shared vision items and the 21 member
empowerment items were worded either the same as those for the leader questionnaire or
similarly, with some differences in wording related to the perspective of the respondent.
Some items to which only a leader could respond were not included in the member questionnaire. The items regarding reputational effectiveness were identical on both forms of the questionnaire. The questionnaires used in the survey were printed on 8 1/2 inch NCS Pearson Form #103188 scanning paper and the pages were stapled together. The items were listed on the left side of each page and circles for marking were arranged on the right. The circles were labeled in a columnar fashion.

These questionnaire forms began with a request for some demographic information regarding the respondent – age, gender, years of membership in the congregation, past leadership experiences, and importance of synagogue membership in their lives. Definitions of each variable were stated. The respondents were asked to comment on their experience with the questionnaire. They were asked to report any difficulty responding, stress related to the statements, and ambiguity of the statements. They were also asked if they felt the items addressed the concept under which they were listed and they were asked for suggestions of additional statements related to the concept. Space for respondent comments was provided on the questionnaire form after the set of statements related to each variable.

**DATA COLLECTION PROCEDURE**

The resulting questionnaires were used to survey two Reform Jewish congregations, Congregation A and Congregation B. I coded the questionnaires for congregation and constituent group. For Congregation A, the professional staff, other staff members, and all board members of the congregation were asked to complete the
leader questionnaire. I mailed these leader questionnaires to staff and board members several weeks prior to a regularly scheduled board meeting. A cover letter (Appendix E) and a self-addressed postage paid return envelop were enclosed in the mailing. At that board meeting, a de-briefing session was held with the respondents at which time they were given more information regarding the investigation’s constructs and the research project. They were asked to share their evaluation of the experience of completing the questionnaire, and for suggestions for additions, deletions, or changes in the items.

The member questionnaire was mailed to members of Congregation A not currently serving as board members or staff. As with the leader survey, a cover letter (Appendix E) and self-addressed postage-paid return envelopes were enclosed in the mailing. Three weeks after the initial mailing, reminder postcards (Appendix F) were mailed to the members who had not yet responded. A focus group was convened for the purpose of debriefing some individuals from this member group regarding their experience with their questionnaire as had been done for board members. They were also asked for suggestions for additions, deletions, or changes regarding the items on the questionnaire. Because a still greater response from the member constituency of this congregation was desired, questionnaires were again mailed to those who had not responded several months after the initial mailing, including four members who had joined in the intervening months. A new cover letter (Appendix E) was enclosed because this last mailing included an
incentive – a coupon for free bagels – to complete and return the questionnaires.\(^2\) I provided this incentive coupon on the basis of recommendations by Dillman (2000).

According to Dillman, who cites social exchange theory and research, surveyed individuals are more likely to respond if a meaningful incentive is supplied. “If a surveyor has made a goodwill gesture such as sending a dollar or two as token appreciation in advance, that produces a sense of reciprocal obligation, especially if the offer is made in a pleasant way” (p. 153). While Dillman recommends cash incentives and provides data to confirm this practice, that was not practical for this self-funded dissertation research. However, the studies Dillman cites do show an increased response with material items but an increase that is less impressive than that obtained by enclosing cash. Therefore, I had reason to believe that the “bagel coupon” would provide increased response at no increased research cost.

For Congregation B, I mailed leader questionnaires to staff and board members in the initial mailing. I mailed member questionnaires to member households. This initial mailing to Congregation B included a similar incentive procedure – a coupon for free bagels at a local bagel shop. As with Congregation A, cover letters (Appendix E) and self-addressed stamped return envelopes were also included in the mailing. No focus group procedures were done with Congregation B. Three weeks after the first mailing, a

\(^2\) I had negotiated the coupon arrangement with a local bagel shop. In exchange for the shop owner’s willingness to provide the bagels, I provided, at my expense, distribution of his company’s advertising coupons in the mailing with the questionnaires.
second mailing of both questionnaires was done to those who had not responded. This mailing included a brightly colored request for response and another bagel coupon.

DATA ANALYSIS

The unit of analysis for this study was the individual respondent. In order to determine whether each of the four independent variables (shared vision, board education, self-evaluation, and member empowerment) is linearly related to the dependent variable (reputational effectiveness rating), scatterplots were analyzed for each data set, leader and member.

ANALYSES REGARDING THE QUESTIONNAIRES

Because the leader questionnaires included 66 items and a total of 70 leader questionnaires were mailed to board members and staff of both congregations, even if all questionnaires were returned, this sample would not meet the minimum five-to-one observation-to-item ratio required sample size for factor analysis (Hair, Anderson, Tatham, & Black, 1995). Therefore only the data arising from the member questionnaire could be considered for factor analysis. I analyzed the member data for appropriateness for factor analysis using four tests: sample size (usable responses), a review of the correlation matrix, Bartlett’s Test of Sphericity, and the Kaiser-Meyer-Olkin Measure of Sampling Adequacy. Because the data was deemed appropriate based on these four tests, a factor analysis of the member questionnaire was conducted in order to confirm that the items designated as measures of each variable are measuring the same dimension, i.e., are
loading on that factor. Scales for the member constituency for shared vision, member empowerment, and effectiveness were developed from the factor loadings. The factor loadings from the member questionnaires were used to develop shared vision, member empowerment, and effectiveness scales for the leader constituency with the addition of those items that were not included in the member questionnaire. For the board development and self-evaluation factors, all items in the questionnaire were included in the scales in anticipation of future research with larger samples of congregation leaders affording the opportunity of factor analysis of these variables.

I tested the resulting scales for internal consistency reliability. The Chronbach’s Alpha measure, averaging all possible split-half correlations, was employed.

**RELATIONSHIPS AMONG THE VARIABLES**

In addition to investigating the reliability of the instruments and the loadings of the items on the identified factors, I explored the relationship of the independent and dependent variables. The study of only two congregations is understood to be insufficient for generalization or drawing conclusions regarding comparisons of the effectiveness of congregations. However, the results of the analysis of this data from the respondents of these two congregations more than meets the minimum requirement of five-to-one observations-to-independent variables to explore the role of the independent variables in predicting and explaining reputational effectiveness (Hair et al., 1995). The correlation of the scores for each of the management practices with the reputational effectiveness ratings for leader and member groups was explored and tested for significance. Because it is
understood that each of these four management practices is influenced by the presence of each of the other practices, each data set, leader and member, was analyzed in a multiple regression procedure to estimate the ability of the combined independent variables (the variate), four for leaders and two for members, to explain the variance in reputational effectiveness of the congregations. Furthermore, the multiple regression procedure was employed to provide insight into the relative importance of each of the independent variables in explaining the variance in reputational effectiveness.

ROLE OF CONSTITUENCY IN RELATION TO THE VARIABLES

I analyzed the data for the role of constituency group (i.e., leader or member status) in relation to the variables. The group means for each scale was compared for significant differences. Testing as described by Baron and Kenny (1986) and Hair et al., (1995) was done for moderator effects of status on shared vision and member empowerment in their ability to predict reputational effectiveness. The moderator effect was tested by observing the interaction of status for each predictor (independent) variable in predicting the outcome (dependent) variable.

“IMPORTANCE OF MEMBERSHIP” AS A POSSIBLE MODERATOR

I also explored a possible moderator effect of “importance of membership,” a question that was included in the demographic information. The moderator effect was tested by observing the interaction of importance of membership with the independent variables for leaders and members in predicting reputational effectiveness.
HYPOTHESES

The following are the hypotheses on which the development of these two questionnaires are based:

**Hypothesis I:** Leaders of congregations who rate their congregations more highly in their shared vision, board development, self-evaluation, and member empowerment practices will also rate their congregations higher in reputational effectiveness.

**Hypothesis II:** Members of congregations who rate their congregations more highly in their shared vision and member empowerment practices will also rate their congregations higher in reputational effectiveness.

**Hypothesis III:** For congregation leaders, perceptions of shared vision, member empowerment, board development, and self-evaluation will contribute to the variance in perceptions of effectiveness.

**Hypothesis IV:** For congregation members, perceptions of shared vision and member empowerment will contribute to the variance in perceptions of effectiveness.

**Hypothesis V:** Explanation of variance in perceptions of effectiveness will be influenced (moderated) by constituent group (leader or member status).
CHAPTER 4

RESULTS

RESPONSE TO SURVEY

The two congregations that participated in this study are similar in ideology, structure, and size. They are both Reform Jewish congregations affiliated with the Union of American Hebrew Congregations. Congregation A has 300+ members and Congregation B has 200+ members. Each congregation is led by a rabbi with a small staff, a volunteer board of directors, and a set of committees. While these two congregations are both in mid-western communities, there are some important differences in their settings and their histories. Congregation A is located in a suburban community adjacent to a larger city with a Jewish Federation, a Jewish Community Center, a number of Reform, Conservative, and Orthodox synagogues, and a variety of Jewish organizations and services. It was founded 25 years ago as a break-away congregation from a large, historical Reform temple. Congregation B, was established 127 years ago in a small city in which there is only one other (Conservative) synagogue, a Jewish Community Council (with no facility), and no other Jewish community facilities or organizations. These differences impact on the management of congregations in several ways. Older, more
established congregations are more likely to have financial resources such as endowments to assist them in budgeting for program, building, and staffing needs. Congregations in larger cities have more opportunities for potential growth but greater competition for members and volunteer service time. I have noted these differences because such variables could impact on the perceptions of the leaders and members in their assessments of the congregations. However, because it would be difficult to control for every variable due to the number of Reform congregations from which to select, and because I believe that ideology, structure, and size have the greater impact on those perceptions, I was more concerned about selecting congregations for this study that are similar in these areas.

The response rates from these two congregations (described below) are based on the total number of questionnaires mailed and the total number of individuals responding regardless of the usability of the responses. At least two contacts were made with each group. "Multiple contacts have been shown to be more effective than any other technique for increasing response to surveys" (Dillman, 2000, p. 149).

**CONGREGATION A**

For the member group of Congregation A, a total of 289 questionnaires were mailed (member questionnaire is in Appendix D). The first mailing of 285 member questionnaires was followed by a postcard reminder three weeks after the first mailing (Appendix F). The reminder resulted in two phoned requests for another copy of the questionnaire which were immediately sent. This first set of mailings produced 82 returned questionnaires, a response rate of 28.7%. Two of these were not usable having
been returned with accompanying notes saying the individual was not able to complete the questionnaire, one due to age and another due to difficulties with English. Because a response of 80 usable questionnaires was inadequate for the desired statistical analyses, another mailing, which included an incentive coupon (for free bagels) was done five months after the first mailing. This mailing included four additional members who had joined the congregation in the intervening months, bringing the total member questionnaires mailed to congregation A to 289. This mailing produced the return of an additional 60 questionnaires for a total of 140 usable member responses and a response rate of 49.1%. (The cover letters for these mailings can be found in Appendix E.)

Of the 19 Congregation A Board members who had been mailed questionnaires, 14 were mailed back, a response rate of 73.6% (leader questionnaire is in Appendix C). Of the six staff members surveyed, four responded, a rate of 66.7%. This resulted in 18 questionnaires returned by leaders of Congregation A, a response rate of 72% for the combined board and staff mailings. (Cover letter for this mailing is in Appendix E.)

The overall response rate for Congregation A was 50.9% with 140 usable member questionnaires and 18 usable leader questionnaires.

**CONGREGATION B**

The initial mailing to 192 members of Congregation B included an incentive coupon (also for free bagels). This mailing resulted in 69 questionnaires returned by respondents, a response rate of 35.9%. Two envelopes were returned by the post office as undeliverable. An additional member questionnaire was mailed to an individual who had
been mailed a leader questionnaire in error (see below), bringing the total number of member questionnaires mailed to 193. Three weeks after the initial mailing, questionnaires were again mailed to those who had not responded. This mailing resulted in additional 30 questionnaires returned by respondents, for a member total of 99 responses, a response rate of 51.3%. Four of the returned questionnaires were not usable, two included notes saying the individual was unable to respond and two were just returned blank with no explanation. Ninety-five of the member questionnaires were usable. (Cover letters are in Appendix E.)

Forty-three Congregation B Board members were sent leader questionnaires. Thirty-three were returned completed, a response rate of 76.7%. (Cover letter is in Appendix E.) One was returned with a note stating the individual was not a Board member and that her name was only included on that mailing list as a courtesy. This individual was subsequently mailed a member questionnaire.

The two staff members who were mailed leader questionnaires both responded, a response rate of 100%. The response rate for leaders – board and staff combined – for Congregation B was 77.8%.

The overall response rate for Congregation B was 56.3% with 95 usable member questionnaires and 35 usable leader questionnaires.

**TOTAL RESPONSE**

With both congregations combined, the response rate for the member questionnaires was 50%. The response rate for the leader questionnaires, including both
board and staff was 75.7%. The overall response rate, combining both leader and member responses for both congregation was 53.2%. According to Rubin and Babbie, “a response rate of at least 50 percent is usually considered adequate for analysis and reporting” (1993, p. 340).

Although I recognize that there may be differences in perceptions regarding these congregations between those who responded to the survey and those who did not, I lacked the data to analyze these differences. It could be useful to know the differences between these two groups regarding gender, involvement in congregation life, and importance of membership in their lives.

The response information is summarized in Table 1.
<table>
<thead>
<tr>
<th>Congregation</th>
<th>Questionnaires mailed</th>
<th>Returned - Not delivered</th>
<th>Responded</th>
<th>Usable Responses</th>
<th>Response Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Member</td>
<td>289</td>
<td>0</td>
<td>142</td>
<td>140</td>
<td>49.1%</td>
</tr>
<tr>
<td>Board</td>
<td>19</td>
<td>0</td>
<td>14</td>
<td>14</td>
<td>73.6%</td>
</tr>
<tr>
<td>Staff</td>
<td>6</td>
<td>0</td>
<td>4</td>
<td>4</td>
<td>66.7%</td>
</tr>
<tr>
<td>Board + Staff</td>
<td>25</td>
<td>0</td>
<td>18</td>
<td>18</td>
<td>72%</td>
</tr>
<tr>
<td>Total A</td>
<td>314</td>
<td>0</td>
<td>160</td>
<td>158</td>
<td>50.9%</td>
</tr>
<tr>
<td><strong>B</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Member</td>
<td>193</td>
<td>2</td>
<td>99</td>
<td>95</td>
<td>51.3%</td>
</tr>
<tr>
<td>Board</td>
<td>43</td>
<td>0</td>
<td>33</td>
<td>33</td>
<td>76.7%</td>
</tr>
<tr>
<td>Staff</td>
<td>2</td>
<td>0</td>
<td>2</td>
<td>2</td>
<td>100%</td>
</tr>
<tr>
<td>Board + Staff</td>
<td>45</td>
<td>0</td>
<td>35</td>
<td>35</td>
<td>77.8%</td>
</tr>
<tr>
<td>Total B</td>
<td>238</td>
<td>2</td>
<td>134</td>
<td>130</td>
<td>56.3%</td>
</tr>
<tr>
<td><strong>A &amp; B</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Member</td>
<td>482</td>
<td>2</td>
<td>241</td>
<td>235</td>
<td>50%</td>
</tr>
<tr>
<td>Board</td>
<td>62</td>
<td>0</td>
<td>47</td>
<td>47</td>
<td>75.8%</td>
</tr>
<tr>
<td>Staff</td>
<td>8</td>
<td>0</td>
<td>6</td>
<td>6</td>
<td>75%</td>
</tr>
<tr>
<td>Board + Staff</td>
<td>70</td>
<td>0</td>
<td>53</td>
<td>53</td>
<td>75.7%</td>
</tr>
<tr>
<td>Total A+B</td>
<td>552</td>
<td>2</td>
<td>294</td>
<td>288</td>
<td>53.2%</td>
</tr>
</tbody>
</table>

Table 1: Response rates for Congregations A and B to mailings of leader and member questionnaires.
COMPARING THE TWO MAILINGS TO CONGREGATION A

In order to determine if the five month period between the two mailings to the members of Congregation A resulted in one or two respondent groups, the demographic information from the two groups were compared as were the differences in the mean responses regarding shared vision, member empowerment, and effectiveness. Age, years of membership, and responses to the questionnaire items were compared in a 2-tailed independent samples t-test. Categorical information was compared in a chi-square procedure. There was a significant difference in age between the two mailing groups with the first mailing group mean age of 52.2 years and the second mailing group mean of 46.5 years (t=2.960, df=132, p=.004). There was no significant difference in years of membership in the current congregation (t=1.868, df=132, p=.064), gender ($\chi^2$=.698, df=1, p=.403), past leadership in current congregation ($\chi^2$=2.741, df=1, p=.098), or past leadership in another congregation ($\chi^2$=.273, df=1, p=.601). More importantly, there was no significant difference between the two mailing groups in the value placed in congregation membership (Pearson $\chi^2$=.708, df=3, p=.871). T-tests of the differences regarding their responses to the questionnaire items for scale development revealed no significant difference between the two mailing groups for any of the 37 items. Therefore, for all further analyses, the Congregation A member responses were treated as one group.
DESCRIPTION OF RESPONDENTS

MEMBER RESPONDENTS

The means of the age of respondents and the years of membership reported by the
member groups of Congregation A and Congregation B were compared using a two-tailed
independent samples t-test. For those respondents from Congregation A who reported
their age, the mean age was 49.7 years (s=11.547). The mean age of the respondents
from Congregation B who reported their age was 60.8 years (s=16.467). The mean years
of membership reported for Congregation A was 9.3 years (s=9.955); for Congregation B
the mean reported was 27 years (s=22.559). Both age (t=-5.579, df=150.710, p<.001)
and years of membership (t=-7.131, df=98.277, p<.001) were significantly different for the
two congregation groups of member respondents. Given that Congregation B has been in
existence a century longer than Congregation A and that there is no competing Reform
temple in the vicinity, it is not surprising that the respondents from Congregation B (and
by extrapolation, the congregation itself) would include more older members. And for the
same reasons, the length of membership would be expected to be much greater for
Congregation B than for Congregation A.

Chi-square analysis revealed a statistically significant difference in gender
composition between the two congregation member groups ($\chi^2$=3.661, df=1, p=.056).
Many more women responded from Congregation A than men (70% women, 30% men).
While more women also responded from Congregation B (56% women, 44% men), the
difference was not as great. While I found no empirical data confirming that women are
more likely to respond to mail surveys, this appears to be a generally accepted
phenomenon among researchers who use mail surveys according to E. A. Stasny, Professor of Statistics, The Ohio State University (personal communication, September 23, 2002).

Chi-square analysis of the question regarding past leadership experience in the current congregation also revealed a significant difference between the two congregation member groups ($\chi^2=16.148, df=1, p<.001$). Twenty-one percent of the member respondents from Congregation A reported holding a past leadership position in their current congregation; 46% of the member respondents from Congregation B reported having done so. It follows that, having had many more years of temple membership among them, there would be a greater percent of members from Congregation B who would be likely to report having had the opportunity to hold some past leadership position in their congregation.

There was no significant difference between the respondents from these two member congregation groups regarding leadership experience in previous congregations ($\chi^2=.029, df=1, p=.866$). The percentage of those reporting past leadership experience in a previous congregation was almost identical for the two member groups – 14% from Congregation A and 13% from Congregation B.

Of greater importance, because it is a reflection of general attitude regarding the value of temple membership, is the comparison of the two congregation member respondent groups in their estimation of the importance of temple membership in their lives. Even with the significant differences in age, gender, years of membership, and past leadership experience in their current congregations between the two groups of temple
members, there was no significant difference in their sense of the role temple membership plays in their lives ($t=0.726, df=229, p=0.468$). This lack of difference may be a function of the self-selecting nature of mailed questionnaires, i.e., it is more likely that those who feel temple membership is important in their lives would respond to a questionnaire about their congregation. Fully 91% of all respondents reported that temple membership is either very important, moderately important, or important in their lives.

**LEADER RESPONDENTS**

The demographics of the leader respondents generally follow the same pattern as the member respondents. The t-test for independent samples revealed a significant difference between the two congregation leader groups of respondents in the reported age of respondents ($t=-3.953, df=50, p<.001$). Congregation A leader mean age is 48.8 years ($s=8.892$); Congregation B leader mean age is 61.6 years ($s=11.875$). There was also a significant difference between the two congregation groups of leaders in years of membership ($t=-7.669, df=45.474, p<.001$). Congregation A leader mean is 8.6 years of membership ($s=6.51$); Congregation B leader mean is 37.7 years of membership ($s=20.436$). Again, as with the members, the mean age and number of years of membership reported is greater for Congregation B than for Congregation A. And as with the member groups, these differences make sense given the ages and location of the temples.

The gender composition of the two leader groups did not follow the pattern of the member groups. Of the leader respondents from Congregation A, 59% were male and
41% were female. From Congregation B, 42% of the leader respondents were male and 58% were female. There was no significant difference in the gender composition of the leader groups ($\chi^2=.641$, df=1, $p=.423$).

The two leader respondent groups, like the member groups, do not differ significantly in past leadership in other congregations. A larger percentage of leader respondents from Congregation A than from Congregation B reported having held leadership positions in other congregations, but the difference was not found to be statistically significant.

Regarding the “importance of membership” item, all of the leaders from both congregations rated temple membership as either very important, moderately important, or important. These responses are as would be expected from congregation leaders. Again, it is helpful that there is not a significant difference between the two congregation leader groups regarding “importance.” Differences in their responses to the management and effectiveness items in the questionnaire are not likely to be attributable to differing values regarding the importance of temple membership in their lives.

In summary, demographically the respondents from the two congregations differ in the ways they would be expected to differ given the differences in their synagogue histories and locations. On the average, the leaders and members of Congregation B are older and have been members longer than the same groups in Congregation A. Among those leaders and members who responded to the gender question, more women responded to the survey than men, 172 and 105 respectively. The gender differences between the two member groups is consistent with the gender of respondents to most mail
surveys. About one-fifth of the members of Congregation A have at some time served in leadership positions in their current congregation; nearly one-half of the members of Congregation B did so. While few of the members from either congregation reported having held leadership positions in other congregations, over one-third of the leaders of Congregation A reported having done so. Attitudinally, in regards to the value they place in belonging to a temple, the two congregation member groups did not differ significantly from each other nor did the two congregation leader groups.

COMPARISON OF LEADER AND MEMBER RESPONDENTS

Based on t-tests, the congregations leaders and members were significantly different in years of membership ($t=-3.628$, $df=66.927$, $p=.001$), leadership in other congregations ($\chi^2=229.881$, $df=2$, $p<.001$), and importance of membership ($t=5.281$, $df=115.118$, $p<.001$). All of these differences are reasonable to expect. Regarding years of membership, the mean for leaders was 28.19 years and the mean for members was 16.36 years. It is likely that members of the board would have been, on the average, associated with the congregation longer than members not serving in these positions. It is also not surprising that a congregation’s leaders, to a greater extent than other members, would have held leadership positions in congregations to which they were previously affiliated. Twenty-three percent of the leaders reported having held leadership positions in other congregations; 14% of the members reported having done so. And, even though 91% of the members had indicated that congregation membership is either important,
moderately important, or very important, it is expected that leaders would respond to an
even greater extent that congregation membership is important in their lives. One hundred
percent of the leaders did so.

Congregation leaders and members did not differ significantly in age ($t=1.464$, df=277, p=.144) or gender ($\chi^2=2.641$, df=1, p=.104). It is interesting to note that the mean age of the leaders and the mean age of the members from their respective congregations are similar. Congregation A mean age for leaders is 49 years and the mean age for members is 50 years. Congregation B mean age for leaders is 62 years and the mean age for members is 61 years. If these samples are representative of the age make-up the congregation and of their boards, the boards appear to be representative of their congregations in age.

**DATA PROCESSING**

The questionnaires, having been printed on NCS Pearson Form #103188 scanning paper, were scanned with an NCS Opscan 10 scanner by The Ohio State University Office of Testing. Subsequently, some demographic data was entered into the computer by hand. The demographic data was explored for missing and out of range values. Some corrections were made where respondents had handwritten responses but incorrectly marked their response form. The responses to the scale development items were reviewed for incorrectly completed forms and the data was prepared for analysis by evaluating the missing values. Some individuals did not respond to some items or responded twice to the same item. Both of these were left as blank entries and treated as missing values. Some
questionnaires were completed in pen rather than pencil; others were not marked in the
proper manner for the scanner to read. These responses were entered by hand. The data
that had been entered in the scanning process was spot-checked and found to be accurate.
The results of the negatively stated questionnaire items were reversed to make analysis
compatible with the positively stated items. All data from this survey was analyzed and
results developed using the SPSS 10.1 Windows Program.

DEVELOPMENT OF THE SURVEY INSTRUMENTS

One purpose of this research was the testing of the relationships between the
independent variables and reputational effectiveness. The results of this testing is
presented in the next section of this report. Another purpose of this research was the
development of two related survey instruments – one for congregation leaders and one for
congregation members not currently serving as staff or on the synagogue board of
directors. These instruments are focused on providing insight into the perception of the
congregation’s management practices and the way these perceptions relate to the
reputational effectiveness of the congregation. Five constructs were included in this
research – independent variables shared vision, board development, self-evaluation,
member empowerment, and dependent variable reputational effectiveness. Because
multiple indicators of the construct – questionnaire items – provide opportunities to
address different facets of the construct and “more accurately reflect the ‘true’ response
than does a single response” (Hair et al., p. 9), respondents were asked to respond to a list
of sentences regarding each construct in a Likert-scale manner. The validity of the
constructs is dependent on these indicators used to measure them and the relationships among the indicators and the research variables. “Construct validity is based on the way a measure relates to other variables in a system of theoretical relationships” (Rubin and Babbie, 1993, p. 173). The empirical determination of which items are representative of the construct is accomplished by exploratory factor analysis, “a statistical approach that can be used to analyze interrelationships among a large number of variables [i.e., questionnaire items] and to explain these variables in terms of their common underlying dimensions (factors)” (Hair et al., 1995, p. 16). SPSS was used to develop the data for the factor analysis.

**APPROPRIATENESS OF DATA FOR FACTOR ANALYSIS**

In order to determine the appropriateness of factor analysis with this data, a number of issues were considered.

1. **Sample size**: According to Hair et al., (1995), the minimum sample size for factor analysis is the number of observations (i.e., questionnaire items) multiplied by five. The leader questionnaire with 66 items would require 330 cases. Having collected data from only 53 leaders, factor analysis is not appropriate for the data from the leader group. The member questionnaire with 37 items requires a minimum sample size of 185 cases. With results from 235 member respondents, the member data meets this minimum requirement. Therefore, only the member data was given further consideration for factor analysis.
2. **Correlation Matrix**: Factor analysis is considered appropriate if the observed variables are related to one another and, therefore, likely to share common factors. Correlations among the variables of equal to or greater than .3 are needed. A review of the correlation matrix for the member survey data revealed many correlations greater than .3, many greater than .4, and some greater than .5 and .6. Therefore, this data set met this requirement for factor analysis.

3. **Bartlett’s Test of Sphericity**: In order to determine that the correlation matrix is not an identity matrix (i.e., items correlated only with themselves and not with each other), Bartlett’s Test of Sphericity was run with the member data. The null hypothesis that the items are not correlated was rejected (Approx. $\chi^2=3193.439$, df=666, $p<.001$). Thus the data passed this test for appropriateness for factor analysis.

4. **Kaiser-Meyer-Olkin Measure of Sampling Adequacy**: This index comparing the magnitude of the observed correlation coefficients to the magnitude of the partial correlation coefficients requires a minimum KMO value of .5 in order for the data to be appropriate for factor analysis. The test on the member data resulted in a KMO of .916. This level is described by Hair et al. (1995) as being “marvelous” (p. 374).

Therefore, all tests for appropriateness indicate that the data from the member questionnaire responses is well within the parameters suggested for factor analysis.
SELECTION OF ROTATION AND EXTRACTION PROCEDURE

“The ultimate goal of any rotation [of factors] is to obtain some theoretically meaningful factors and, if possible, the simplest factor structure” (Hair et al., 1995, p. 383). According to Gorsuch (1983), an evaluation of the correlations among the factors provides direction regarding selection of the most effective rotational procedure for factor analysis. Because the three factors included in the member questionnaire are presumed to be correlated, one would expect that an oblique rotation, which allows correlation of factors instead of maintaining independence, would produce the most interpretable solution (Hair et al.). Visual examination of the results of several rotational procedures, as recommended by Gorsuch, did indeed result in an oblique rotation providing the clearest loading pattern. Hair et al. describe loadings as being indicative of “the degree of correspondence between the variable and the factor, with the higher loadings making the variable representative of the factor” (p. 380) The clearest loading pattern was obtained for the three constructs in the member questionnaire (shared vision, member empowerment, and general perception of effectiveness) using Maximum Likelihood Extraction and Promax (oblique) Rotation (See Table 3). Using the same extraction method and Varimax (orthogonal) rotation yielded most of the same loadings, albeit not so clear, giving additional justification for the factor pattern established by the Promax rotation. Both the Promax and Varimax rotations were converged after 7 iterations giving further credence to this structure. This quick convergence demonstrates the attainment of a simple structure (Gorsuch, 1983).
<table>
<thead>
<tr>
<th>Factor</th>
<th>Member Empowerment</th>
<th>Effectiveness</th>
<th>Shared Vision</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member Empowerment</td>
<td>1.000</td>
<td>.549</td>
<td>.630</td>
</tr>
<tr>
<td>Effectiveness</td>
<td>.549</td>
<td>1.000</td>
<td>.612</td>
</tr>
<tr>
<td>Shared Vision</td>
<td>.630</td>
<td>.612</td>
<td>1.000</td>
</tr>
</tbody>
</table>

Extraction Method: Maximum Likelihood.
Rotation Method: Promax with Kaiser Normalization.

Table 2: Factor Correlation Matrix

INVESTIGATION OF THE LOADINGS

In order to identify items for scale development, minimum loadings of questionnaire items on the three factors were established. According to Stevens (1996), minimum loadings relative to sample size are determined by doubling the critical value for statistical significance. He stated the relevant levels as follows (p. 371):

<table>
<thead>
<tr>
<th>Sample Size</th>
<th>2(Critical Value)</th>
<th>Minimum Loading</th>
</tr>
</thead>
<tbody>
<tr>
<td>200</td>
<td>2(.182)</td>
<td>.364</td>
</tr>
<tr>
<td>250</td>
<td>2(.163)</td>
<td>.326</td>
</tr>
</tbody>
</table>

Because my member sample size is 235, I decided that items loading equal to or greater than .350 would be required for each item to be considered part of a factor scale. A few items had significant loadings on more than one factor. When this occurred, the item was considered to be a part of the scale for the factor on which it had the highest loading unless it loaded relatively equally on all three factors. In the case of loading relatively equally on all three factors, the item was eliminated from the factor scales.
<table>
<thead>
<tr>
<th>Item #</th>
<th>Item Label</th>
<th>Factor</th>
<th>Member Effectiveness</th>
<th>Effectiveness</th>
<th>Shared Vision</th>
</tr>
</thead>
<tbody>
<tr>
<td>19</td>
<td>r Leadership easier if $</td>
<td></td>
<td>.752</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Opportunity for input in planning</td>
<td></td>
<td>.703</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>r My opinion re event timing</td>
<td></td>
<td>.703</td>
<td></td>
<td></td>
</tr>
<tr>
<td>24</td>
<td>Member effort access leadership</td>
<td></td>
<td>.685</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>r Opportunity for nominating input</td>
<td></td>
<td>.674</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>r Leadership held by small group</td>
<td></td>
<td>.667</td>
<td></td>
<td></td>
</tr>
<tr>
<td>26</td>
<td>Leadership training available to all</td>
<td></td>
<td>.644</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Cong views in Bd deliberations</td>
<td></td>
<td>.581</td>
<td></td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>Diversity of opinion welcomed</td>
<td></td>
<td>.568</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Member ideas in planning</td>
<td></td>
<td>.567</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Comfortable making suggestions</td>
<td></td>
<td>.557</td>
<td>.416</td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>Informed of Bd decisions</td>
<td></td>
<td>.537</td>
<td>.365</td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>r Members attend Bd mtgs</td>
<td></td>
<td>.531</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Ease of involvement</td>
<td></td>
<td>.530</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Leaders approachable</td>
<td></td>
<td>.519</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Informed re upcoming mtgs</td>
<td></td>
<td>.519</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Bd mtgs open to members</td>
<td></td>
<td>.470</td>
<td></td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Program reflect member input</td>
<td></td>
<td>.450</td>
<td></td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>Feel valued as a volunteer</td>
<td></td>
<td>.420</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Post event opinion input</td>
<td></td>
<td>.365</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Express self as a Jew</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>27</td>
<td>Aux leaders step to cong</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>31</td>
<td>r Cong fulfills my needs</td>
<td></td>
<td></td>
<td>.885</td>
<td></td>
</tr>
<tr>
<td>33</td>
<td>Cong spiritually satisfying</td>
<td></td>
<td></td>
<td>.863</td>
<td></td>
</tr>
<tr>
<td>29</td>
<td>Talk is positive</td>
<td></td>
<td></td>
<td>.451</td>
<td>.370</td>
</tr>
<tr>
<td>35</td>
<td>Serves members competently</td>
<td></td>
<td></td>
<td>.442</td>
<td>.364</td>
</tr>
<tr>
<td>30</td>
<td>Cong-Rabbi satisfying relationship</td>
<td></td>
<td></td>
<td>.421</td>
<td>.397</td>
</tr>
<tr>
<td>37</td>
<td>Effective problem solving</td>
<td></td>
<td></td>
<td>.393</td>
<td>.381</td>
</tr>
<tr>
<td>28</td>
<td>Membership growing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>32</td>
<td>r Carry programs to completion</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Ongoing strategic planning</td>
<td></td>
<td></td>
<td>.550</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Jewish values in mission</td>
<td></td>
<td></td>
<td>.522</td>
<td></td>
</tr>
<tr>
<td>34</td>
<td>Meets fund-raising goals</td>
<td></td>
<td></td>
<td>.466</td>
<td></td>
</tr>
<tr>
<td>36</td>
<td>Innovative programming</td>
<td></td>
<td></td>
<td>.442</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Mission statement available</td>
<td></td>
<td></td>
<td>.432</td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>Recognize effort of all in group</td>
<td></td>
<td></td>
<td>.383</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Goals available to all</td>
<td></td>
<td></td>
<td>.380</td>
<td></td>
</tr>
</tbody>
</table>


r indicates negatively stated item that was reversed.

Table 3: Pattern matrix from factor analysis of member questionnaire.
SCALES BASED ON FACTOR LOADINGS

The factor analysis resulted in three scales as follows:

1. **Member Empowerment Scale**: Twenty items loaded on the Member Empowerment factor. Eighteen of these items had been included in the member empowerment construct on the questionnaire. Two items, #2 and #4, that had been part of the shared vision construct in the questionnaire, loaded clearly on the member empowerment factor. These two items involve member input in the planning process. Because members who feel that their ideas are included in planning are likely to feel empowered, it makes sense conceptually to include these as items for the Member Empowerment Scale.

   Three items from the member empowerment portion of the questionnaire did not load highly enough or clearly enough in the factor analysis to be included on the member empowerment scale or any other. Item #15 (As a member of my congregation, I am able to express myself as a Jew) loaded below the threshold value on two factors (.239 on member empowerment and .224 on effectiveness). It was eliminated from the scales. Item #25 (In my congregation, when a program or project is the result of group effort, the entire group is recognized) loaded relatively equally on all three factors, the highest loading (.383) being the shared vision factor. Because this loading was shared with the other factors, because this loading was not high, and because it did not fit conceptually
with shared vision, this item was eliminated from the scales. Item #27 (Auxiliary organization leadership – for example, Sisterhood, Brotherhood – is viewed as one possible step toward congregational leadership) did not load on any factor at the threshold level and was therefore eliminated from the scales.

2. **Effectiveness Scale:** Six items loaded clearly on the effectiveness factor. All of these items were included in the general perceptions of effectiveness construct in the questionnaire. Four items from that section of the questionnaire did not meet the minimum requirement for loading on the Effectiveness Factor. Items #28 (The membership base of my congregation appears to be growing) and #32 (My congregation is not successful in carrying its programs to completion) loaded below threshold on any factor and were eliminated from the scales. Items #34 (My congregation is generally able to meet its fund-raising goals) and #36 (My congregation is innovative in developing programs) loaded on the shared vision factor and were included in that scale (see below). No items from any other construct on the questionnaire loaded on the effectiveness factor.

3. **Shared Vision Scale:** Seven items met the minimum requirement for loading on the shared vision factor. One item, #25, was eliminated as explained above, leaving six items on the Shared Vision Scale. Regarding items #34 and #36, success in the areas of fund-raising and positive attitudes about program development could conceivably be associated with
the vision of the leadership being shared by the membership. Therefore, it is conceptually sensible to include these as part of the Shared Vision Scale. Two items that had been part of the shared vision construct on the questionnaires, #2 and #4, loaded on the member empowerment factor and described above and were included on that scale.

The three member scales established in factor analysis – the Shared Vision Scale (6 items), the Member Empowerment Scale (20 items), and the Effectiveness Scale (6 items) – are the scales used for further analysis. The member scales are presented in Appendix G.

Because of a concern that there might be some important difference between the earlier and later mailings to the member group from Congregation A, that some intervening event may have influenced the results of the respondents to the later mailing, I examined the scales using t-tests for comparison of means. There was no significant difference between the responses of the first mailing group and the second mailing group (shared vision – t=-1.065, df=136, p=.289; member empowerment – t=-.021, df=133, p=.983; effectiveness – t=-.749, df=138, p=.455). These results supported the treatment of both mailing groups as one group.

Scales were also developed for the five constructs included in the leader questionnaire. Because factor analysis could not be applied to the leader data, the scales were based on the loadings developed with the member data. Those items that were eliminated from the Member Scales were also eliminated from the Leader Scales. The loadings that resulted in moving items from one questionnaire construct to a different scale
were used as a basis for making the same changes in the leader scales. Those items that were in the leader questionnaire but did not appear in the member questionnaire were included in the leader scales. The scales for leaders are presented in Appendix H.

RELIABILITY OF THE FACTOR SCALES

Due to the social constructionist nature of the questionnaires (i.e., judgements of the respondents regarding abstract concepts), some measurement error is expected either due to the design of the questions or to the lack of certainty of the respondents regarding their responses (Hair et al., 1995, p. 624). “Reliability is the degree to which the observed variable measures the ‘true’ value and is ‘error free’. Thus it is the opposite of measurement error.” (Hair et al., p.9) Internal consistency reliability (“the average of all possible split-half reliabilities” Rubin & Babbic, 1993, p. 171) was investigated as an indicator of measurement error. Testing of the constructs for internal consistency reliability was done using the SPSS scale reliability function.

A threshold alpha value of .70 is commonly used as an acceptable measure of reliability, “although this is not an absolute standard, and values of below .70 have been deemed acceptable if the research is exploratory in nature” (Hair et al., p. 641). Testing was done for internal consistency reliability of the three member factor scales as developed in factor analysis. With no deletion of items for any of the three scales, the following alpha coefficients were found:
Shared Vision Scale .7026 (6 items)
Member Empowerment Scale .9199 (20 items)
Effectiveness Scale .8311 (6 items)

With an acceptability threshold alpha value of .70, all three scales were found to be within acceptable limits.

The internal consistency reliability alpha coefficients for the leader scales with no deletion of items are as follows:

Shared Vision Scale .8562 (13 items)
Board Development Scale .7342 (11 items)
Self-evaluation Scale .6870 (7 items)
Member Empowerment Scale .7618 (24 items)
Effectiveness Scale .8223 (6 items)

All but the Self-evaluation Scale met the threshold alpha level of .70 of acceptability. The deletion of one item, #29, resulted in a small elevation of the alpha coefficient to .7220. Because the threshold of .70 is not an absolute standard and because this research is exploratory, the Self-evaluation alpha level of .6870 was deemed acceptable.

ANALYSES RELATED TO THE HYPOTHESES

RELATIONSHIPS AMONG THE VARIABLES

Results for Leaders: The descriptive statistics for leaders are summarized in Table 4. For the 53 leader respondents, there were significant positive correlations between the perceptions of board development and reputational effectiveness \(r=.435,\)
and between the perception of member empowerment and reputational effectiveness \( (r = 0.620, p < 0.001) \) (See Table 5.). The correlations between perception of shared vision and reputational effectiveness \( (r = 0.018, p = 0.449) \) and between self-evaluation and reputational effectiveness \( (r = -0.095, p = 0.253) \) were not significant. Hypothesis I was partially supported; leaders of the congregation who rated their congregations more highly regarding board development and member empowerment also rated their congregations more highly in reputational effectiveness. There is no support, at least in this bivariate analysis, to make this statement for perceptions of shared vision or for perceptions of self-evaluation.

<table>
<thead>
<tr>
<th>Scale</th>
<th>Mean</th>
<th>Std. Deviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reputational Effectiveness Scale</td>
<td>9.91</td>
<td>5.524</td>
</tr>
<tr>
<td>Shared Vision Scale</td>
<td>7.61</td>
<td>8.609</td>
</tr>
<tr>
<td>Member Empowerment Scale</td>
<td>23.26</td>
<td>13.493</td>
</tr>
<tr>
<td>Board Development Scale</td>
<td>3.99</td>
<td>7.060</td>
</tr>
<tr>
<td>Self-evaluation Scale</td>
<td>-0.95</td>
<td>4.221</td>
</tr>
</tbody>
</table>

Table 4. Descriptive statistics for leaders on the independent and dependent variable scales.
Table 5. Correlation matrix of the scales for leaders.

<table>
<thead>
<tr>
<th>Scale</th>
<th>X₁</th>
<th>X₂</th>
<th>X₃</th>
<th>X₄</th>
<th>X₅</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reputational Effectiveness(X₁)</td>
<td>1.00</td>
<td>.018</td>
<td>.620***</td>
<td>.435***</td>
<td>-.095</td>
</tr>
<tr>
<td>Shared Vision (X₂)</td>
<td>1.00</td>
<td>-.075</td>
<td>.470***</td>
<td>.314*</td>
<td></td>
</tr>
<tr>
<td>Member Empowerment (X₃)</td>
<td>1.00</td>
<td></td>
<td>.478***</td>
<td>.150</td>
<td></td>
</tr>
<tr>
<td>Board Development (X₄)</td>
<td></td>
<td></td>
<td></td>
<td>.420***</td>
<td></td>
</tr>
<tr>
<td>Self-evaluation (X₅)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1.00</td>
</tr>
</tbody>
</table>

*p<.05  ***p= or <.001

Results for Members: Descriptive statistics for members are summarized in Table 6. For the 220 member respondents, there were significant positive correlations between perceptions of shared vision and reputational effectiveness ($r=.597$, $p<.001$) and between perceptions of member empowerment and reputational effectiveness ($r=.560$, $p<.001$) (See Table 7). Hypothesis II was supported. Members of congregations who rated their congregations more highly regarding shared vision and member empowerment also rated their congregations more highly in reputational effectiveness.
<table>
<thead>
<tr>
<th>Scale</th>
<th>Mean</th>
<th>Std. Deviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reputational Effectiveness</td>
<td>8.60</td>
<td>6.036</td>
</tr>
<tr>
<td>Shared Vision Scale</td>
<td>7.85</td>
<td>6.692</td>
</tr>
<tr>
<td>Member Empowerment Scale</td>
<td>15.75</td>
<td>16.069</td>
</tr>
</tbody>
</table>

Table 6. Descriptive statistics for members on the independent and dependent variable scales.

<table>
<thead>
<tr>
<th>Scale</th>
<th>Intercorrelations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reputational Effectiveness (X₁)</td>
<td>1.00</td>
</tr>
<tr>
<td>Shared Vision (X₂)</td>
<td>0.597***</td>
</tr>
<tr>
<td>Member Empowerment (X₃)</td>
<td>0.560***</td>
</tr>
</tbody>
</table>

Table 7. Correlation matrix of the scales for members.

***p<.001.
MULTIPLE REGRESSION ANALYSES

SPSS multiple regression was used for these analyses of variances. In these exploratory analyses of the contribution of the independent variables – perceptions of shared vision, member empowerment, board development, and self-evaluation – to the explanation of the variance in the dependent variable – reputational effectiveness, I used simultaneous entry of the data for each of the respondent groups, leaders and members. For both groups, I examined the residuals by observing the mean of the residuals, the distribution of the residuals, the Durbin-Watson value for autocorrelation, and the plots of the residuals for constant variance. There was no evidence for either the leader or member data set that the assumptions of normal distribution, mean of zero, autocorrelation, or constant variance, were being violated. Also for both groups, Tolerance and Variance Inflation Factor (VIF) values were observed for multicollinearity concerns. There is no support for the existence of multicollinearity for either the leaders or the members.

Results for Leaders: For leaders of the congregations, a linear combination of perceptions of shared vision, board development, self-evaluation, and member empowerment explained 48.6% of the variance in reputational effectiveness ($R^2 = .486$). This proportion of variance explained was found to be statistically significant ($F=10.882$, df= 4, $p<.001$). Hypothesis III was supported. The contributions of three of the independent variables to the explanation of variance in reputational effectiveness were statistically significant – perceptions of board development ($B=.246$, $t=2.049$, $p=.003$), perceptions of self-evaluation ($B=-.401$, $t=-2.130$, $p=.036$), and member empowerment ($B=.344$, $t=2.925$, $p=.004$).
t=2.601, p=.012), and perceptions of member empowerment (B=.212, t=3.961, p<.001).
For this leader data, the relationship between perceptions regarding self-evaluation and reputational effectiveness is negative. For every unit of increase in the rating for self-evaluation, the rating regarding effectiveness can be expected to decrease. For the board development and member empowerment variables, the relationship with reputational effectiveness is positive. For every unit of increase in ratings regarding board development or member empowerment, the ratings in effectiveness can be expected to increase. The net result, when all the independent variables are included in the equation, is a positive relationship.

The contribution of perceptions of shared vision to the explanation of variance in reputational effectiveness was not statistically significant (B=.0037, t=-.043, p=.966). Although all three of the other leader independent variables contributed significantly to the explanation of variance, member empowerment (Beta=.517) contributed somewhat more to the explanation of variance than the other two variables. The regression values for the leader data are summarized in Table 8.
<table>
<thead>
<tr>
<th>Variable</th>
<th>B</th>
<th>Std. Error</th>
<th>Beta</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shared Vision</td>
<td>.004</td>
<td>.084</td>
<td>.006</td>
</tr>
<tr>
<td>Member Empowerment</td>
<td>.212</td>
<td>.053</td>
<td>.517***</td>
</tr>
<tr>
<td>Board Development</td>
<td>.246</td>
<td>.120</td>
<td>.314*</td>
</tr>
<tr>
<td>Self-evaluation</td>
<td>-.401</td>
<td>.154</td>
<td>-.306*</td>
</tr>
</tbody>
</table>

R² = .486 (p<.001).
*<.05. ***p<.001.

Table 8. Summary of simultaneous regression analysis for leader variables predicting reputational effectiveness (N=51).

Regression Diagnostics – Leader Data: I investigated the leader data for influential cases by observing values for studentized residuals, leverage points, Cook’s Distance, DFBETA, and COVRATIO. All questionnaires for cases with values higher than the threshold values were considered for visual review for obvious problems (i.e., incomplete or incorrectly completed forms, multiple indications of indecisiveness, forms completed in collaboration by more than one individual). Because I wish to be conservative in eliminating cases, only those cases with values that exceeded the threshold values on two or more tests were reviewed. For the leader data, two cases were identified as having higher than threshold levels on two or more of the above mentioned tests. Neither of these questionnaires showed any obvious reason for elimination. Both of these forms were correctly completed and the respondents did not appear indecisive or confused. Therefore, I did not delete these from the data set.
Results for Members: For the members group, a linear combination of perceptions of shared vision and member empowerment explains 43% of the variance in reputational effectiveness ($R^2=.429$). This proportion of variance explained was found to be statistically significant ($F=81.657, p<.001$). The contribution to the explanation of the variance in reputational effectiveness by both of the independent variables was statistically significant – perceptions of shared vision ($B=.378, t=6.633, p<.001$) and perceptions of member empowerment ($B=.123, t=5.258, p<.001$). For every unit of increase in shared vision, ratings of effectiveness can be expected to increase by .378. For every unit of increase in member empowerment, ratings of effectiveness can be expected to increase by .123. While shared vision (Beta = .412) explained slightly more of the variance in reputational effectiveness than member empowerment (Beta = .327), the difference between the two was not great. The regression values for the member data are summarized in Table 9. Hypothesis IV was supported. For congregation members, a linear combination of perceptions of shared vision and perceptions of empowerment significantly contribute to the variance in perceptions of effectiveness.

<table>
<thead>
<tr>
<th>Variable</th>
<th>B</th>
<th>Std. Error</th>
<th>Beta</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shared Vision</td>
<td>.378</td>
<td>.057</td>
<td>.412***</td>
</tr>
<tr>
<td>Member Empowerment</td>
<td>.123</td>
<td>.023</td>
<td>.327***</td>
</tr>
</tbody>
</table>

$R^2=.429$ ($p<.001$).

***$p<.001$.

Table 9. Summary of simultaneous regression analysis for member variables predicting reputational effectiveness (N=220).
**Regression Diagnostics – Member Data:** As I did for the leader data, I investigated the member data for influential cases by observing values for studentized residuals, leverage points, Cook’s Distance, DFBETA, and COVRATIO. Again, I considered for visual review all questionnaires for cases with values higher than the threshold values for these tests and only those cases with values that exceeded the threshold values on two or more tests were reviewed. For the member data, 13 cases were identified as having higher than threshold levels on two or more of the above mentioned tests. Of the 13, ten questionnaires showed no obvious reason for elimination. Three questionnaires had been completed by elderly people who appeared to have some difficulty completing the form. I evaluated each of these three cases individually for influence on the regression equation and the partial regression coefficients. Even though the proportion of the variance explained increased slightly with the removal of each case, none of these cases changed the regression equation enough to change the level of significance of that proportion. Nor did any one of the three cases change the partial regression coefficients enough to change their significance levels. Therefore, because I am reluctant to disqualify a case and wish to be conservative in this matter, I did not delete these cases from the sample and retained the original data set.

**COMPARING LEADER AND MEMBER RESPONSES**

A t-test revealed no significant difference between members and leaders responses in their perceptions of their congregation’s effectiveness ($t=-1.660$, $df=279$, $p=.098$) or in their perceptions of shared vision in their congregation ($t=1.033$, $df=279$, $p=.302$). The t-
test did reveal the leaders’ member empowerment rating to be significantly higher than members’ member empowerment ratings (t=-3.265, df=272, p=.001). The member empowerment mean for leaders was 23.50; the mean for members was 15.74.

For both leaders and members, member empowerment was significantly correlated with reputational effectiveness (r=.620, p<.001 and r=.560, p<.001 respectively). This was not the case for perceptions of shared vision. Only the member responses regarding perceptions of shared vision were significantly correlated with reputational effectiveness (r=.597, p<.001 for members and r=.018, p=.449 for leaders). Similar results were found regarding contribution to the explanation of variance in reputational effectiveness. In the multiple regression analyses, only for members did perceptions of shared vision contribute significantly to the explanation of variance in ratings of effectiveness.

**THE INFLUENCE OF MEMBER/LEADER STATUS**

A moderator effect of status was found when I investigated the effect of status on the explanation of variance in reputational effectiveness. Using a linear combination of perceptions of shared vision and member empowerment, I compared the regression equation without the member/leader moderator variable with the regression equation including the member-leader moderator variable. The data revealed a significant change in the regression equation (R^2=.427, df=5, F=39.536, p<.001; R^2_{change}=.032, F_{change}=7.463, df_1=2, df_2=265, p=.001).

For the combined leader and member respondents, there was a significant regression coefficient for shared vision when explaining variance in reputational
effectiveness (B=.320, t=6.678, p<.001). This would mean that, holding member empowerment constant, for every unit of increase in ratings of shared vision, one could expect a .320 increase in reputational effectiveness. However, the increase in reputational effectiveness (as predicted by shared vision) was not constant across the values for leaders and members due to the significant interaction effect between status and shared vision (B=-.278, t=-3.122, p=.002). With the member variable valued 0 and the leader variable valued 1, the negative interaction effect between status and shared vision confirms the correlation relationship – that shared vision has a greater effect for members than it does for leaders. When the interaction with status is included in the equation, with a one unit increase in the rating for shared vision one can expect a .042 increase in reputational effectiveness for leaders and a .320 increase for members. Table 10 summarizes the interaction effect for perceptions of shared vision.

<table>
<thead>
<tr>
<th>Variable</th>
<th>B</th>
<th>Std. Error</th>
<th>Beta</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shared Vision</td>
<td>.320</td>
<td>.048</td>
<td>.427**</td>
</tr>
<tr>
<td>Interaction of Shared Vision and Status</td>
<td>-.278</td>
<td>.089</td>
<td>-.222**</td>
</tr>
</tbody>
</table>

R² = .427 (p<.001), R²change = .032 (p=.001) for a linear combination of shared vision, member empowerment, and a dummy variable (member=0, leader=1).

**p<.01. ***p<.001.

Table 10. Summary of simultaneous regression analysis for interaction of leader/member status with perceptions of shared vision when predicting reputational effectiveness (N=271).
For the combined leader and member respondents, there was a significant regression coefficient for member empowerment when explaining variance in reputational effectiveness (B = 0.123, t = 5.293, p < 0.001). This would mean that, holding shared vision constant, for every unit of increase in ratings of member empowerment one could expect a 0.123 increase in reputational effectiveness. However, the increase in reputational effectiveness (as predicted by member empowerment) is not constant across the values for leaders and members due to the significant interaction effect between status and member empowerment (B = 0.133, t = 2.506, p = 0.013). With the member variable valued 0 and the leader variable valued 1, the positive interaction confirms the correlation relationship — member empowerment has a greater effect for leaders than it does for members. When the interaction with status is included in the equation, with every one unit of increase in member empowerment, one can expect a 0.256 increase for leaders and a 0.123 increase for members. Table 11 summarizes the interaction effect for perceptions of member empowerment.

Hypothesis V was supported. With perceptions of shared vision and member empowerment as the independent (predictor) variables, explanation of variance in perceptions of effectiveness is moderated by constituent group (leader or member status). The relationship between the independent variables and reputational effectiveness changes as a function of member/leader status.
<table>
<thead>
<tr>
<th>Variable</th>
<th>B</th>
<th>Std. Error</th>
<th>Beta</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member Empowerment</td>
<td>.123</td>
<td>.023</td>
<td>.327***</td>
</tr>
<tr>
<td>Interaction of Member Empowerment and Status</td>
<td>.133</td>
<td>.053</td>
<td>.242*</td>
</tr>
</tbody>
</table>

R² = .427 (p<.001), R²change = .032 (p=.001) for a linear combination of shared vision, member empowerment, and a dummy variable (member=0, leader=1).

*p<.05. **p<.01. ***p<.001.

Table 11. Summary of simultaneous regression analysis for interaction of leader/member status with perceptions of member empowerment when predicting reputational effectiveness (N=271).

THE INFLUENCE OF “IMPORTANCE OF MEMBERSHIP”

Having learned that member/leader status interacted with the independent variables in the explanation of the variance in reputational effectiveness, I investigated the influence of “importance of membership” on the regression equation separately for leaders and for members.

Using a linear combination of shared vision and member empowerment to explain the variance in reputational effectiveness for members, importance of membership was not demonstrated to be a moderator variable. The comparison of regression equations with and without the interaction revealed that importance of membership did not significantly change the regression equation for members (R²change = .008, df₁=2, df₂=211, p=.189).

Using a linear combination of shared vision, board development, self-evaluation, and
member empowerment to explain the variance in reputational effectiveness for leaders, importance of membership was not demonstrated to be a moderator variable. The comparison of regression equations with and without the interaction revealed that importance of membership did not significantly change the regression equation for leaders ($R^2_{\text{change}}=.060$, $df_1=4$, $df_2=40$, $p=.263$).
CHAPTER 5

DISCUSSION

APPLICATION OF FINDINGS TO THE THEORETICAL BASE OF THE RESEARCH

There are two theoretical perspectives informing the design of this study. One of these is social constructionism – the perceptions of individuals regarding the organization are the reality of the organization. This theory, purports that, due to the lack of ability to objectively measure effectiveness in nonprofit organizations, effectiveness research must rely on evaluations of individuals inside and outside the organization (Herman and Heimovics, 1990; Herman and Renz, 1997; Herman, Renz, and Heimovics, 1997; and Forbes, 1998). As stated by Herman, Renz and Heimovics and quoted earlier in this paper, “Effectiveness is judgement” (p. 375). With this concept in mind – that reality is created by the people involved in the congregation – I designed questionnaires to elicit those individual perceptions regarding some of the congregation’s management practices and the congregation’s effectiveness. I mailed these questionnaires to individuals affiliated
with two Reform Jewish congregations. Based on the responses of those individuals, collective ratings of effectiveness and the perceptions regarding the independent variables were accepted as the reality in those congregations.

The second theoretical model on which this research was based is that of the presence of multiple constituencies relevant to an organization. Herman and Renz (1997) and D’Aunno (in Hasenfeld, 1992) discuss the necessity to base evaluations on various constituencies of an organization. Herman and Renz found little or no agreement in effectiveness judgements of the three groups they studied. Becker (1967) discusses differing definitions of reality based on access to information of leaders and members. Cafferata (1979) reported greater satisfaction of leaders and concluded that leader versus member status appears to affect organizational assessment. Therefore, based on the literature and my own experience in Reform Jewish congregations, when developing the preliminary questionnaires for my research, I developed one questionnaire for leaders and one for members of the congregations. While some items on the questionnaires were the same, the wording of some items varied based on the member/leader perspective and the leader questionnaire included some items and variables not on the member questionnaire. The multiple constituency model not only informed the construction of the two questionnaires, but also motivated the analysis of the influence of member/leader status as a moderator variable interacting with the independent variables in perceptions of effectiveness.

Through factor analysis of the data arising from the member responses to the questionnaires, I developed member and leader survey instruments. Analysis of these two
instruments, based on the perceptions of leaders and members, resulted in findings that are consistent with the multiple constituency model – there were differences between the responses of leaders and members. Furthermore, the status of the respondents, leader versus member, interacted with shared vision and member empowerment influencing the explanation of the variance in reputational effectiveness. This interaction significantly changed the regression equation.

Therefore, there is reason to conclude that the inclusion of both leader and member perceptions of the reality of congregation functioning, i.e., being guided by social constructionism and the multiple constituency model, is a realistic approach in the attempt to understand conditions of congregational life.

OVERVIEW OF THE FINDINGS

INTERPRETATION OF THE HYPOTHESES

The hypotheses related to the congregation leaders were only partially supported. These two hypotheses were stated as follows:

**Hypothesis I:** Leaders of congregations who rate their congregations more highly in their shared vision, board development, self-evaluation, and member empowerment practices will also rate their congregations higher in reputational effectiveness.

**Hypothesis III:** For congregation leaders, perceptions of shared vision, member empowerment, board development, and self-evaluation will contribute to the variance in perceptions of effectiveness.
instruments, based on the perceptions of leaders and members, resulted in findings that are consistent with the multiple constituency model – there were differences between the responses of leaders and members. Furthermore, the status of the respondents, leader versus member, interacted with shared vision and member empowerment influencing the explanation of the variance in reputational effectiveness. This interaction significantly changed the regression equation.

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**Hypothesis I:** Leaders of congregations who rate their congregations more highly in their shared vision, board development, self-evaluation, and member empowerment practices will also rate their congregations higher in reputational effectiveness.

**Hypothesis III:** For congregation leaders, perceptions of shared vision, member empowerment, board development, and self-evaluation will contribute to the variance in perceptions of effectiveness.
The hypothesis regarding moderation by member or leader status was supported. This hypothesis was stated as follows:

**Hypothesis V:** Explanation of variance in perceptions of effectiveness will be influenced (moderated) by constituent group (leader or member status).

Member versus leader status does influence the prediction of the change in reputational effectiveness when perceptions of shared vision and member empowerment are the predictors. With shared vision as the predictor variable, the expected change in ratings of effectiveness is less for leaders than it is for members. With member empowerment as the predictor variable, the expected change in ratings of effectiveness is less for members than it is for leaders. These relationships are discussed at greater length below.

**THE INDEPENDENT VARIABLES**

**Shared Vision:** The variable shared vision included such indicators as engaging in strategic planning and having and being aware of a mission statement and goals. While the mean response for members and leaders was not significantly different, the relationship between shared vision and reputational effectiveness was very different for the two response groups. Shared vision was significantly and positively correlated with reputational effectiveness for the members of congregation but not for the leaders. When controlling for other independent variables, the variable shared vision also contributed significantly to the variance in reputational effectiveness for members but not for leaders. Of the two independent variables on the members’ questionnaire, shared vision was the
more highly correlated with reputational effectiveness and explained the higher level of variance in reputational effectiveness. Yet for leaders, neither of these relationships approached statistical significance.

Based on the findings of this study, the relationship between shared vision and reputational effectiveness as the variables are perceived by leaders and members is unclear. Why would members’ and leaders’ perceptions of shared vision have so different a relationship with perceptions of effectiveness? Do members of congregations have a greater sense of their congregation’s reason for existence than the governing body? Are board members so caught up in the minutiae of the organization’s management that they cannot “see the forest for the trees”? Do congregation volunteer board members view the exercise of examining their mission and goals as irrelevant, a waste of their time? From my own experience dealing with congregational volunteer boards, there is very little desire to spend valuable meeting time discussing values, mission, and goals.

My findings for the leader group are not consistent with the previous research regarding shared vision issues. Researchers, studying leader responses regarding various specific practices related to value identification, mission statement development, and strategic planning, found significant positive relationships between engaging in these practices and performance measures (Bradshaw, Murray, and Wolpin, 1992; Green and Griesinger, 1996; Smith and Shen, 1996; Siciliano, 1997). The negative relationships found by Bradshaw, Murray, and Wolpin were between the various shared vision practices and conflict and financial deficit. Even the process by which “shared” vision is accomplished is discussed at length in the research. Rogers and Ballard (1995), Smith and
Shen, and Carver (1997) discuss the importance of the board’s collective creation and continual review of the statement regarding the organization’s reason for existence. Items regarding collaborative development and periodic review were in my leader questionnaire.

The responses of the leaders of the congregations in this study did not follow the pattern of the previous research. Are congregation leaders truly different from other nonprofit organization leaders in this respect? Perhaps the difference from previous research regarding the role of shared vision as reported by leaders is related to the size of my sample of leaders. With only two congregations included in the study, the number of leaders from which to elicit responses is necessarily limited. While a large percentage of leaders responded (72% from Congregation A and 78% from Congregation B), the number of participating leaders was only 53 people. Or perhaps the differences between the leader and member responses is a function of shared vision being perceived differently based on constituency. Research involving a larger number of congregations and a larger number of leaders is needed; such research might clarify the role of leader perception of shared vision and might also lend further insight into the area of leader-member differences.

Even though there is this lack of clarity regarding the leaders responses to the shared vision variable, the importance of the shared vision construct to the members group of respondents must be recognized. Just as was found in the previous research of nonprofit organization leaders as described above, for congregation members, a sense of knowing the congregation’s mission and goals is associated with more favorable feelings regarding the congregation’s effectiveness.
Board Development: Indicators for this variable included the provision of opportunities and the board’s participation in Jewish study and leadership training experiences. Because responding to these indicators requires knowledge of board activities, this construct was included only in the leaders’ questionnaire. The leaders’ responses regarding board development were significantly and positively correlated with reputational effectiveness. In multiple regression analysis, controlling for shared vision, self-evaluation, and member empowerment, the board development variable also contributed significantly to the explanation of variance in reputational effectiveness. It is apparent that for board members, a sense of their own knowledge regarding their responsibilities as leaders is an important factor in their assessment of the congregation’s ability to function effectively.

The findings of my study are consistent with the previous research regarding board development. For example, Green and Griesinger (1996) found a significant positive correlation between organizational effectiveness and board involvement in board development. Specifically, they found boards of more effective organizations to be more actively engaged in training new board members and that boards of more effective organizations delineate specific duties for board members. The results of every study I reviewed emphasized that a well-educated and well-informed board is an important element of an effective organization (Herman and Tulipana, 1985; Cook and Brown, 1990; Holland, Leslie, and Holzhalb, 1993; Rogers and Ballard, 1995; Smith and Shen, 1996; Gibelman, Gelman, and Pollack, 1997, Jackson and Holland, 1998). My research
lends further support to this body of research regarding nonprofit organizations in general as well as supporting the need for board development for congregation boards specifically.

**Self-evaluation:** Indicators for the self-evaluation variable included practices such as post-event review, measuring progress toward goals, evaluating performance as it relates to mission and Jewish values, and review of board performance and decision-making processes. This variable was included only in the leader questionnaire. The self-evaluation leader response correlation data, while negative in relationship to reputational effectiveness, was minimal and not statistically significant. However, when there was control for the other independent variables in the regression analysis (shared vision, board development, and member empowerment), self-evaluation was a significant contributor to the explanation of variance in reputational effectiveness. Again, the relationship was negative – for every unit of increase in self-evaluation, a decrease could be expected in the rating of effectiveness.

It is conceivable that the more critically leaders examine the performance of the board and the organization, the lower will be their assessment of their congregation’s effectiveness. However, the literature regarding self-evaluation and performance assessment points toward a positive relationship between the two ratings. Regardless of whether the raters were board members or CEO’s and regardless of which areas of evaluation were studied, the relationship between ratings of self-evaluation and ratings of effectiveness was a positive one in the studies I reviewed. For example, Green and Griesinger (1996) found significant positive correlations for CEO scores relating organizational effectiveness and monitoring services and between organizational
effectiveness and evaluating board performance. For board members, Green and Griesinger found significant positive correlations between reassessing the organization’s performance and organizational effectiveness. Yet in my study, which included both staff and volunteer board member responses, the relationship between self-evaluation and effectiveness was negative. Do congregation leaders differ from leaders in other nonprofit organizations in their perspective regarding self-evaluation? Is the criteria on which they base their judgements of the effectiveness of the organization different than for other nonprofit organizations? Or, again, is this difference a function of the small size of the leader sample in this study? Perhaps, with a larger sample of congregation leaders, both staff and volunteer, the relationship between self-evaluation and perceptions of effectiveness for congregation leaders might be more clear.

**Member Empowerment:** The member empowerment variable included such indicators as nominating processes, openness of board meetings, access to leadership, availability of information, and feeling valued as a volunteer. The findings of this study regarding the member empowerment variable were the most straight-forward. For both leaders and members, there was a significant and positive correlation between perceptions of empowerment and reputational effectiveness. In the multiple regression analysis, for both leaders and members, perceptions of member empowerment significantly contributed to explaining the variance in reputational effectiveness.

The mean of the leaders’ rating regarding member empowerment was significantly higher than the mean for members’ rating. It is entirely reasonable that the leaders of the
congregations, those involved in policy setting and decision making, would feel more empowered than the members. This is an example of perception being influenced by the constituency perspective.

The findings in my study are consistent with previous research. Sherman, Smith, and Mansfield (1986), Herman and Heimovics (1990), and Zalenski, Zech, and Hoge (1994) all found significant and positive correlations between some aspect of information sharing and organizational effectiveness. McGaw (1979) concludes from his research that decentralization of power is associated with a sense of belonging. Zalenski, Zech, and Hoge found a significant and positive relationship between access to leadership positions and financial support of congregations. Information sharing, decentralization of power, and access to leadership positions were all included in the indicators of member empowerment in my leader and member questionnaires.

It is clear that feeling informed, included, and valued is an important factor in both leaders’ and members’ assessments of their congregation’s ability to function effectively.

THE INFLUENCE OF STATUS AND MEMBER/LEADER DIFFERENCES

As stated above, the findings of this study supported the hypothesis that individual assessments of the congregation are influenced by status (leader vs. member). That is, a respondent’s status interacts with the other variables in ratings of effectiveness. With shared vision as predictor, the expected change in ratings of effectiveness is greater for members than it is for leaders. With member empowerment as predictor, the expected change in ratings of effectiveness is greater for leaders than it is for members. The
correlation data indicated that the variables would be related in this way. The interaction
data confirms the importance of status in understanding the evaluating of congregational
effectiveness. These relationships support the concept of the multiple constituency model.
Member and leader perceptions do differ in important ways and both perspectives are
needed to have a complete picture of a congregation’s functioning.

However, members and leaders did not differ completely. For both groups, there
was a significant and positive correlation between perceptions of member empowerment
and reputational effectiveness. And for both groups, in multiple regression analysis,
member empowerment contributed significantly to the variance in reputational
effectiveness. The mean ratings between the two groups regarding shared vision were not
significantly different. With both leader and member ratings arising from two highly rated
congregations, there was not a significant difference in mean rating between leaders and
members regarding reputational effectiveness. (On a scale ranging from -12 to +12, the
mean rating for Congregation A was 9.33 and for Congregation B it was 10.23.) It would
be interesting to compare this finding with ratings from leaders and members of
congregations that received lower effectiveness ratings from their affiliates. Would there
be less agreement between leaders and members regarding their congregation’s
effectiveness for congregations that are experiencing functioning difficulties?
Would leaders of less effective congregations report their congregations to be more
effective than other members of the same congregation? Will they “develop ways of
denying failure” (possibly even to themselves) as described by Becker (1967, p. 243).
Further research comparing results from congregations with higher and lower effectiveness ratings is needed to answer these questions.

Nevertheless, the most relevant finding regarding this interaction data is the importance of the influence of status. Only a very few of the articles that I reviewed included member perspectives in their research. These data indicate the necessity to include both perspectives, member and leader, when evaluating the effectiveness of a congregation. Seeking evaluation data from the usual gatekeepers – clergy, administrator, president – or board members without obtaining evaluations from other members of the congregation does not provide a complete profile of a congregation’s effectiveness.

CONFOUNDING VARIABLES

Some differences, not specifically management in nature, could influence the perceptions of a congregation’s functioning. These include environmental, congregational, and individual variables. While it was not practical to control for all of these differences (due to a limited number of congregations from which to choose), I did attempt to minimize the effect of these variables where possible and to report those differences that could not be controlled.

ENVIRONMENTAL VARIABLES

The type of population center in which the synagogue is located — small town, large city, urban versus suburban — could influence assessments regarding a congregation’s functioning. A congregation in a small town where there are no other Jewish
congregations or Jewish organizations will experience congregation life quite differently from a congregation in a large urban center where there are many other synagogues, a Jewish Federation, and various other Jewish organizations, facilities, and resources. The small town congregation may be its members’ only source of Jewish experience outside the home. A congregation in a community with many Jewish resources may experience a great deal of competition for volunteer participation of its members. Because I could not control for this variable, I acknowledged and reported the congregations’ differences regarding their location.

CONGREGATIONAL VARIABLES

An important congregational factor that might influence the perceptions of effectiveness is the size of the congregation (the number of member units or households considered to be affiliated with the congregation). A congregation of fifty member units will feel and function differently from a congregation of 1500 member units. In this study the congregations were both medium-sized with member households in the 200-300 range. Because Reform Jewish congregations range in size from less than ten member households to greater than 3,000 member households, congregations that only differ by 100 member units would be considered to be similar in size. By surveying two congregations of similar size, I minimized the influence of this confounding variable.

Another confounding variable related to the congregations involved is the age of the congregation – the number of years since it was founded. A congregation organized in the last few years that has no inter-generational experience and history of dealing with
challenges and adversity will feel and function differently than a congregation founded in the 19th century with families that have invested multiple generations of time and money in the continuity of the synagogue. This difference in the congregations surveyed in this study was reported.

Yet another factor that could influence the perceived effectiveness of a congregation is the original impetus for the organization of the congregation. For example, was the congregation organized to provide a synagogue option in a location where there previously was none or is the congregation a break-away congregation resulting from conflict in another congregation? For the latter congregation, “baggage” from the conflict experience could impact on current perceptions, expectations, and practices. Again, I reported this difference for the congregations in this study.

Ideological issues could also influence perceptions of effectiveness. I minimized the concern with this variable by selecting congregations from the same denominational organization.

The financial stability of a congregation could be a confounding variable. For privacy reasons, this information was not available and was not included in the description or analyses of the results. This is one of the limitations of this study.

**INDIVIDUAL VARIABLES**

When developing the preliminary questionnaires, I had considered “importance of membership” to be an indicator of commitment to the congregation. Commitment has been shown to influence the willingness of congregation members in their financial support
of their churches (Hoge and Yang, 1994; Olsen and Cadell, 1994). Kanter (1972) discussed commitment to a group in terms reflective of exchange theory and Maslow’s self-actualization – the connection between self-interest and the needs of the group.

However, when I explored the role of importance of membership as a moderator variable, it was not found to be a moderator variable for members or leaders with this data. Perhaps the relationship of commitment with congregation is not the same for Reform Jews as it is for Christian church members. Or perhaps importance of membership, as it appeared in my questionnaires, is too broad a question to be a good indicator of commitment. The question on both leader and member questionnaires referred to the importance of a congregation in their lives. Perhaps I should have used a set of indicators, including specific questions regarding participation in programs and use of the services provided by the temple. In retrospect, I realize that I should have asked the respondents more directly to rate their level of commitment to this particular congregation as well as including other indicators of commitment. Nevertheless, the “importance of membership” responses provide some information regarding the respondents’ valuation of congregation membership.

LIMITATIONS OF THE STUDY

There are many factors not included in this study that contribute to the well-being of Reform Jewish congregations. This study deals with only four areas of management practice — shared vision, board development, self-evaluation, and member empowerment. These four areas were selected because of their importance as reflected in the literature
dealing with nonprofit organizations in general. This research was designed to develop survey instruments that illuminate the role of these four factors in congregation management, but this study did not identify what other factors may be contributing to the variability in effectiveness among Reform Jewish congregations.

A limitation in the design of this study of two congregations is the resultant restricted size of the sampling frame of congregation leaders. The number of responding leaders, even if all participated, limits the meaningfulness of some statistical analyses and cannot provide the numbers needed for some other analyses. A study of many more congregations is needed to provide a large enough sampling frame to remedy this situation.

Another limitation of the design is the self-selecting nature of a mailed survey. Even in very effective congregations, it is all too easy for individuals to opt not to participate. Marginalized members (an amorphous group that could be considered to be a sort of constituency of its own) may not respond even after repeated mailings. Indeed, any individual may decide not to participate for their own personal and unrelated reasons.

Furthermore, the lack of a means for objective measurement of congregational effectiveness is a limitation. As stated earlier, there is no way to measure the output of a religious congregation when the ultimate goal of congregational functioning is to make positive changes in peoples’ lives and to preserve the faith from generation to generation. There are no objective intake measurements when people join a congregation, output measurements at various intervals during the tenure of their membership, or exit measurements when they leave the congregation. The only measure we have of
determining whether or not the religious congregation is achieving the goal of making a
difference in the lives of members is the subjective perception of the individuals that are
functioning inside and outside of the organization. As for the future of Judaism, it will
take many decades and even centuries to know how successful today’s synagogues are in
achieving this goal. The use of the concept of “reputational effectiveness” is one way to
view the ability of a congregation to make change in peoples’ lives and to impart Jewish
knowledge and experience, but by definition it is limited to those subjective evaluations. It
is possible that a sense of loyalty or even just identification with the congregation will
result in unrealistically positive responses — a desire to “make the congregation look
good.” Conversely, congregants with an “axe to grind” may respond negatively as a
means of venting their anger.

Nevertheless, inasmuch as this research has begun the development of tools that
have the potential for adding some information to the body of knowledge about nonprofit
organizations, religious congregations in general, and about Reform Jewish congregations
in particular, it is a meaningful and valuable research effort.

**THE SURVEY INSTRUMENTS AND FUTURE RESEARCH**

Having had many years of experience in congregation leadership and having
learned of the multiple constituency concept, I believed there would be a need for leader
and member input regarding congregation functioning. Therefore, I undertook the
development of two preliminary questionnaires, one for leaders and one for members. The
findings from this research supported the need to include both leader and member
perspectives when assessing congregational functioning. Analysis of the two preliminary questionnaires resulted in the development of two survey instruments, one for leaders and one for members. The leader instrument consists of five scales – a shared vision scale, a board development scale, a self-evaluation scale, a member empowerment scale, and an effectiveness scale. The member instrument consists of three scales – a shared vision scale, a member empowerment scale, and an effectiveness scale. Further analysis of these scales confirmed the need for surveying both leaders and members. I have demonstrated that these scales are reliable within the accepted standards. And I have demonstrated their validity both by review by knowledgeable individuals and by the statistical application of factor analysis.

However, this is only the first step in the development of these survey instruments. I recommend that they be used in further research with congregations and suggest the following areas of investigation:

- Continuing the development and refinement of the scales dealing with the variables that were included in this study.
- Furthering the development of the leader scales with a larger number of leaders participating.
- Using the scales with more specific constituent groups to develop greater understanding of the varying perspectives of congregation functioning.
- Using the scales to compare the responses from congregations that represent the high and low extremes of effectiveness for the purpose of clarifying those practices essential to good congregational management.
• Including additional variables and investigating their relationship to perceptions of congregational effectiveness. Such variables might include information systems, financial stability, breadth of programming, adherence to constitutional mandate, and power structure. While all of these were touched on in the scales that I developed in this study, they deserve a closer look.

**IMPLICATIONS FOR CONGREGATIONS AND OTHER NONPROFIT ORGANIZATIONS**

In summary, both leaders and members look more favorably on their congregations when they feel informed, included, valued – empowered. Those who set policy and design programs for congregations would do well to keep this concept in mind when they are considering constitutional revisions, communication systems, nominating processes, committee structures, and leadership development plans. Furthermore, the leaders themselves look more favorably on their congregations when they have opportunities for involvement in education and training for their role as board members. Boards would serve their congregations well to emphasize and insist on participation in such training for their leaders. While these concepts are not new to those knowledgeable in nonprofit organization management consulting, this research provides empirical support and credibility to the principles they have been teaching.

Another implication for those who lead and consult with nonprofit organizations, and specifically with congregations is the necessity to look beyond the leadership for
understanding of organizational activity and effectiveness. Based on the results of this study and others that preceded it, it is becoming increasingly clear that one cannot look at an organization only through the lens of the leaders and expect to have a complete picture of what is going on in that organization. Assessment of the organization is influenced by status. There is a need to include the perspectives of individuals inside and outside of the leadership circle when desiring to understand organizational (congregational) functioning.

CONCLUSION

The importance of empowering others has been recognized by leaders from Biblical times to present-day management gurus. Moses, acting on advice from his father-in-law, delegated authority to a hierarchy of judges.

Moses chose capable men out of all Israel, and appointed them heads over the people – chiefs of thousands, hundreds, fifties, and tens; and they judged the people at all times: the difficult matters they would bring to Moses, and all the minor matters they would decide themselves. (Exodus 18: 25-26 in Plaut, 1981, p. 510)

He decentralized the power in his community, including many others in the leadership of the people. Repeatedly, throughout the desert wanderings of the Israelites, Moses heeded the cry of the people (Numbers 11: 2,10-15; 14: 1-19). He took their needs seriously and responded on their behalf. He facilitated changes to meet their needs. He valued their perspective. He listened.
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These Biblical leaders – by including all the people regardless of rank, by heeding and responding to the needs of the people, by sharing power, information, and knowledge – demonstrated a will to empower those who followed them.

Today, those who write about organization management also recognize the value of leaders empowering their followers. Drucker (1990) approached the notion of empowerment as follows: “Over the door to the non-profit’s boardroom there should be an inscription that says: Membership on this board is not power, it is responsibility” (p. 158). In a conversation with Drucker, Max DePree described this responsibility in terms of a debt:

Leaders are given the gift of leadership by those who choose or agree to follow.

We’re basically a nation of volunteers. I think this means that people choose a leader to a great extent on the basis of what they believe the leader can contribute to the person’s ability to achieve his or her goals in life. This puts the leader in the position of being indebted – in the sense of what he or she owes to the organization. (Drucker, p. 37)

Drucker summarizes DePree’s comments, stating

...[The leaders] owe the customers, the clients, the constituency, whether they are parishioners, or patients, or students. They owe the followers, whether that’s faculty, or employees, or volunteers. And what they owe is really to enable people to realize their potential, to realize their purpose in serving the organization. (p. 44)
As stated by Hesselbein “The more power we give away, the more we have” (1992, p. A17).

The results of my research support the teachings of these leaders, both Biblical and contemporary. Like the nonprofit studies done previously, my exploratory research provides evidence that an educated and prepared congregational leadership and a congregational membership that feels included, informed, and valued — leadership and membership that is enabled and empowered — are associated with congregations that are perceived to be functioning effectively. The survey instruments arising from my study can be used to include both leader and member perspectives in an effort to develop a fuller understanding of the perceptions of both constituent groups regarding management behaviors in Reform Jewish congregations.
LIST OF REFERENCES


APPENDIX A

LETTER OF EXPLANATION

Dear (Congregation President),

I called Rabbi (name) a few days ago to discuss a proposal to use
(congregation B) leaders and members as a part of the research I am doing for my
doctoral dissertation. I am conducting this research under the supervision of my advisor,
Dr. Thomas Gregoire, in the College of Social Work at The Ohio State University. I
believe that the information gleaned from this research will be helpful in increasing
understanding regarding effective congregational management practices. Participating in
this research will not involve any expense to your congregation or your members.

While there is a body of knowledge regarding congregational management, almost
all such peer-reviewed research has been done with churches of various denominations.
There is a minimum of research that includes Jewish congregations and almost none that
focuses on the management of synagogues. It is important that we begin building a
knowledge base dealing with the realities of practice and experience in our own
congregations. It would be of great value to those who care about good management
practices — congregational leaders as well as those who provide services to congregations — to have a greater understanding of the role that various practices play in the effective management of our congregations.

There are four areas of practice under consideration in this research — shared vision, board development, self-evaluation, and member empowerment. I have developed two questionnaires — one for board members and staff and one for members not currently serving on the board. The purpose of the current proposal is to refine these questionnaires. I am asking your leaders and members to participate in this process by completing the questionnaires and providing some feedback regarding the questionnaires. While the questionnaires will be coded for mailing purposes, participation is voluntary and there is no penalty for not participating.

I will mail questionnaires to leaders and members of your congregation. They will be asked to respond to statements based on their own congregational experience. The questionnaires will be mailed by and returned directly to me. All information gleaned from this research will be my property and confidentiality will be maintained. No one other than myself will know which congregations participated in the study, which members responded, or see the responses to the survey. Only aggregate information and unidentified data will be reported in the doctoral dissertation. The responses will be kept locked in my home office and will be destroyed when the study is completed. In return for your participation, you will receive a report of the findings of the study.

In order to understand the way synagogue management practices are perceived by both leaders and members not currently serving as leaders, questionnaires must be mailed
individually to professional staff, members of temple boards, and to members of congregations. Therefore, it will be necessary for you to share your staff and board lists (names and addresses) and your membership list (names and addresses) with me making it possible to mail questionnaires directly to individuals. Because I am sensitive to congregational privacy issues, I assure you that the lists will be used only for mailings related to the study, that the lists will not be shared with any individual or organization, and that the lists will be destroyed when the study is complete.

It is my sincere expectation that by furthering our understanding of the contribution of specific management practices to the well being of our Reform congregations we can better provide an environment that is conducive to valuable spiritual, educational, and social experiences.

I would appreciate your consideration of participation in this study. Please discuss it with the Rabbi and any other leaders you deem necessary. I will call to discuss this further and answer any questions. If you wish to call me, my phone number is (phone number) or you can contact me by return e-mail.

B’Shalom

Tussy Shnider
APPENDIX B

STATEMENTS OF AGREEMENT TO PARTICIPATE

CONGREGATION A

August 2, 2001

Doris T. Shnider
c/o Dr. Thomas Gregoire
Stillman Hall, Room 325U
1947 College Road
Columbus, Ohio 43210

(Congregation A) in (city, state) is pleased to serve as a location for the pilot study of Ms. Doris T. Shnider, Doctoral Candidate in the College of Social Work.

We understand that the pilot study will facilitate a refinement of the instruments for a research project on the factors associated with perceived effectiveness in Reform Jewish congregations from the perspective of the leadership and those not in leadership positions.

We understand that leaders and members of (Congregation A) will be asked to complete a mailed questionnaire: one for those in leadership positions and one for
members of the congregation not currently serving on the Board. The items on the questionnaire will deal with perceptions and experiences regarding congregation and its management practices. The leaders will be asked to participate in a debriefing discussion at a regularly scheduled Board meeting. A group of non-Board members will be asked to come together at the Temple for a debriefing focus group.

We understand that individual participation in this pilot study will voluntary. Identification of the individual will not be expected on the responses, though they will be coded to follow-up on questionnaires that have not been returned. The confidentiality of individual responses will be protected.

We understand that Ms. Shnider intends to conduct the pilot study in September and October, 2001.

Sincerely

President,

(Congregation A)
CONGREGATION B

Tussy Shnider
105 Nob Hill Drive S.
Gahanna, Ohio 43230
April 8, 2002

To Whom It May Concern:

The (Congregation B) Executive Committee and Rabbi (name) have authorized participation in the research project proposed by Doris (Tussy) Shnider. We will provide a mailing list of the congregation’s members as well a mailing list of our Board members. We understand that these lists as well as the responses of our congregation’s members will be destroyed when the study is completed. We also understand that the questionnaires will be coded for mailing purposes and that all responses will be confidential.

Sincerely,

President, (Congregation B)
Demographic Information:

1. Age:
   - 0-9
   - 10-19
   - 20-29
   - 30-39
   - 40-49
   - 50-59
   - 60-69
   - 70-79
   - 80+

2. Number of years you have belonged to this congregation:
   - 0-5
   - 6-10
   - 11-15
   - 16-20
   - 21-25
   - 26-30
   - 31-35
   - 36-40
   - 41-45
   - 46-50
   - 51-55
   - 56-60
   - 61-65
   - 66-70
   - 71-75
   - 76-80
   - 81-85
   - 86-90
   - 91+

3. Gender:
   - Male
   - Female

4. Current leadership position:
   - President
   - Other officer
   - Board member
   - Auxiliary president
   - Non-clergy staff
   - Clergy
   - Other

5. Number of years in your current position:
   - 0-1
   - 2
   - 3
   - 4-5
   - 6-7
   - 8
   - 9+9

Instructions For the Remainder of the Survey:

Please read the statements below and fill in the circle for the answer that best represents your assessment of the statement as it applies to your congregation. Your responses should reflect your personal view of the way things are actually done in your congregation, NOT your opinion of the way things should be done. Please read each statement carefully. Some items are expressed in positive terms and some in negative terms. A response column of No opinion/Not Applicable has been included only for those situations for which there is no other response that could apply. Please use it as little as possible.
Recording Your Thoughts

Because the purpose of this pilot study is to refine the questionnaire, additional space has been included for your thoughts regarding the items to which you will be responding. As you respond to each item, please note your reactions in the space provided after each section.

It will be helpful for you to understand the concepts about which you will be asked. There are five concepts in this questionnaire. They are listed and defined here.

Shared Vision: Factors in the organization's management that demonstrate a broad group process of thought and action regarding the reason for the organization's existence and the organization's future.

Board Development: Factors in the organization's management that demonstrate a desire to educate board members regarding the organization and regarding the role of the board and its members as it relates to the management of the organization.

Self-Evaluation: Factors in the organization's management that demonstrate a desire to understand the positive and negative results of board decisions and congregation programs through self-examination.

Member Empowerment: Factors in the organization's management that promote the ability of the membership to participate in the life and leadership of the organization.

Perceptions of Effectiveness: The opinion of knowledgeable individuals, inside or outside of the organization, regarding the ability of the organization to address the needs of members and/or the mission of the organization.

As you respond to the items on the questionnaire, please identify any concerns you may have regarding the statements:

- Did you have any difficulty responding?
- Did you find the statement stressful?
- Did you find the statement ambiguous?
- Does the statement address the concept under which it is listed?
- Do you have suggestions for additional statements regarding the concept in question?

No Opinion/Not Applicable

Strongly Agree

Agree

Disagree

Strongly Disagree

Shared Vision

1. The board of my congregation has engaged in a process of identifying the core values of the congregation.

2. The values of the congregation have developed a timeline for the accomplishment of long-term and short-term goals.

3. The mission statement for my congregation was developed in a collaborative effort by leaders of the congregation.

4. Congratulations on your /significant progress.

5. The board of my congregation has established short-term goals for the congregation.

6. My congregation is using standardized procedures for planning, budgeting, and maintaining financial records.

7. The board of my congregation periodically reviews the mission and goals of the congregation.

8. The board of my congregation has established a written mission statement for the congregation.

9. The mission of the congregation has been adopted by the entire body of the congregation.

10. Members' ideas are included in making decisions when planning programs or projects.

11. Members' ideas are included in making decisions when planning programs or projects.

Please go on to the next page
Record your thoughts on the questions in the above section (Shared Vision) in the box below.

Board Development

13. The board of my congregation focuses on policies of the congregation rather than the day-to-day operation of the temple.

14. The board of my congregation provides a specification of board education.

15. I am aware of my congregation's short-term goals.

16. The board of my congregation adequately monitors all day-to-day operational matters.

17. The board of my congregation considers the process for dealing with issues to be as important as the substance of the issues.

18. When major decisions, the board of my congregation often does not take a clear position in the process of making the decision.

19. The board of my congregation engages in ongoing board training experiences. (Examples include such activities as retreat, field trips, and mini-lessons at board meetings.)

20. The board of my congregation provides training opportunities for clergy, staff, and board.

21. The board of my congregation has provided training opportunities for board members.

22. The board of my congregation monitors the performance of board members.

23. The board of my congregation develops leadership training programs for members of the board.

Please go on to the next page
Record your thoughts on the questions in the previous section (Board Development) in the box below. Do not make any marks outside of the box.

<table>
<thead>
<tr>
<th>No Opinion/Not Applicable</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Strongly Disagree</th>
<th>Disagree</th>
</tr>
</thead>
</table>

Self-Evaluation

24. After a congregational event or program, members of my congregation are asked for their opinions regarding that event or program.

25. Our board periodically evaluates the methods by which members are involved.

26. The board of my congregation periodically measures progress toward the achievement of the congregation’s goals.

27. Our board periodically evaluates the performance of programs and projects in terms of the mission and goals of the congregation.

28. The board of my congregation evaluates its own performance in some recurring and systematic manner.

Record your thoughts on the questions in the previous section (Self-Evaluation) in the box below. Do not make any marks outside of the box.

Please go on to the next page
31. My opinion regarding the timing of events has not been considered.
32. As a member of the board, I am able to make a real difference, and I am provided with adequate information to make an informed decision.
33. As a board member, I am encouraged to ask questions regarding issues on which I will be voting.
34. Many board members are knowledgeable in their areas of responsibility.
35. Our board meetings are open to the members of the congregation.
36. The minutes of the board meetings are not made available to the congregation.
37. Our congregants are not informed in a timely manner regarding issues that will be deliberated at upcoming board meetings.
38. In my congregation, I feel comfortable in bringing suggestions to a board meeting regarding issues that have been of concern to me.
39. The views of my congregation's members are sought and included in board deliberations.
40. There are no active processes for leading input to clearly communicate to our congregation.
41. As a member of my congregation, I am able to express myself as a Jew.
42. The process for selecting leaders in my congregation does not provide opportunity for board members to monitor.
43. Members of the congregation are not encouraged to attend board meetings.
44. Board meetings are not well informed regarding the issues facing the congregation.
45. It is easy to become involved in the life of my congregation, to participate in programs, projects, and/or committees.
46. It is easy to become involved in the life of my congregation, to participate in programs, projects, and/or committees.
47. It is much easier to rise to leadership in my congregation if one has the resources to contribute large amounts of money.
48. Our congregants are informed in a timely manner regarding decisions that have been made at board meetings.
49. The leaders and approachable and easily accessible.
50. Members of the congregation are approached and directly involved in the decision-making process.
51. The leaders of my congregation are approachable and easily accessible.
52. Most of the congregation's decisions are made by a small core group of leaders, and the board vote is a formality that "rubber stamps" those decisions.
53. Leadership training opportunities are available to all interested members of the congregation.
54. Most of the congregation's decisions are really made by a small core group of leaders, and the board vote is a formality that "rubber stamps" those decisions.
55. Leadership training opportunities are available to all interested members of the congregation.
56. Most of the congregation's decisions are really made by a small core group of leaders, and the board vote is a formality that "rubber stamps" those decisions.
57. Leadership training opportunities are available to all interested members of the congregation.
58. Most of the congregation's decisions are really made by a small core group of leaders, and the board vote is a formality that "rubber stamps" those decisions.
59. Leadership training opportunities are available to all interested members of the congregation.
60. Most of the congregation's decisions are really made by a small core group of leaders, and the board vote is a formality that "rubber stamps" those decisions.
61. Leadership training opportunities are available to all interested members of the congregation.
Record your thoughts on the questions in the previous section (Member Empowerment) in the box below. Do not make any marks outside of the box.

General Perceptions of Effectiveness

57. The membership base of my congregation appears to be growing.
58. The relationship between the congregation and our senior rabbi is mutually satisfying.
59. My congregation is not successful in carrying its programs to completion.
60. My congregation is generally able to meet its fundraising goals.
61. My congregation is innovative in developing programs.
62. My congregation is able to maintain its position as a community leader.
63. My congregation is able to maintain its position as a community leader.
64. My congregation is able to maintain its position as a community leader.
65. My congregation is able to maintain its position as a community leader.

Record your thoughts on the questions in the previous section (General Perceptions of Effectiveness) in the box below. Do not make any marks outside of the box.

Please mail your responses in the enclosed envelope to:

Tussy Shluder
165 Nob Hill Drive South
Gahanna, Ohio 43230

Thank you for your time and effort in completing this questionnaire.
APPENDIX D

MEMBER QUESTIONNAIRE
Demographic Information:

1. Age:

<p>| | | | | | | | | |</p>
<table>
<thead>
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<td>8</td>
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<tr>
<td>9</td>
<td>10</td>
<td>11</td>
<td>12</td>
<td>13</td>
<td>14</td>
<td>15</td>
<td>16</td>
<td>17</td>
</tr>
</tbody>
</table>

2. Number of years you have belonged to this congregation:

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<td>5</td>
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<td>10</td>
<td>11</td>
<td>12</td>
<td>13</td>
<td>14</td>
<td>15</td>
<td>16</td>
<td>17</td>
</tr>
</tbody>
</table>

3. Gender: □ Male □ Female

4. Have you ever held a leadership position in your current congregation? (If your answer to this question is "No", please skip to number 7.)

□ Yes □ No

5. What were your positions and for how long were you in those positions?

<table>
<thead>
<tr>
<th>Position</th>
<th>Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>President</td>
<td></td>
</tr>
<tr>
<td>Other officer</td>
<td></td>
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<tr>
<td>Board member</td>
<td></td>
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<tr>
<td>Auxiliary president</td>
<td></td>
</tr>
<tr>
<td>Non-clergy staff</td>
<td></td>
</tr>
<tr>
<td>Clergy</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
</tbody>
</table>

8. When was the last time you served in a leadership position in your current congregation?

□ 1-2 years ago
□ 3-5 years ago
□ More than 5 years ago

7. Have you ever held a leadership position in other congregations? (If your answer to this question is "No", please skip to number 10.)

□ Yes □ No

8. If so, what were your positions and for how long were you in those positions?

<table>
<thead>
<tr>
<th>Position</th>
<th>Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>President</td>
<td></td>
</tr>
<tr>
<td>Other officer</td>
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<tr>
<td>Board member</td>
<td></td>
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<tr>
<td>Auxiliary president</td>
<td></td>
</tr>
<tr>
<td>Non-clergy staff</td>
<td></td>
</tr>
<tr>
<td>Clergy</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
</tbody>
</table>

9. When was the last time (year) you served in a leadership position in another congregation?

□ 1-2 years ago
□ 3-5 years ago
□ More than 5 years ago

10. Is being a member of a congregation an important part of your life?

□ Very Important
□ Moderately Important
□ Important
□ Not Important

Instructions For the Remainder of the Survey:

Please read the statements below and fill in the circle for the answer that best represents your assessment of the statement as it applies to your congregation. Your responses should reflect your personal view of the way things are actually done in your congregation, NOT your opinion of the way things should be done. Please read each statement carefully. Some items are expressed in positive terms and some in negative terms. A response column of No opinion/Not Applicable has been included only for those situations for which there is no other response that could apply. Please use it as little as possible.
Recording Your Thoughts

Because the purpose of this pilot study is to refine the questionnaire, additional space has been included for your thoughts regarding the items to which you will be responding. As you respond to each item, please note your reactions in the space provided after each section.

It will be helpful for you to understand the concepts about which you will be asked. There are five concepts in this questionnaire. They are listed and defined here.

Shared Vision: Factors in the organization's management that demonstrate a broad group process of thought and action regarding the reason for the organization's existence and the organization's future.

Board Development: Factors in the organization's management that demonstrate a desire to educate board members regarding the organization and regarding the role of the board and its members as it relates to the management of the organization.

Self-Evaluation: Factors in the organization's management that demonstrate a desire to understand the positive and negative results of board decisions and congregation programs through self-examination.

Member Empowerment: Factors in the organization's management that promote the ability of the membership to participate in the life and leadership of the organization.

Perceptions of Effectiveness: The opinion of knowledgeable individuals, inside or outside of the organization, regarding the ability of the organization to address the needs of members and/or the mission of the organization.

As you respond to the items on the questionnaire, please identify any concerns you may have regarding the statements:

- Did you have any difficulty responding?
- Did you find the statement stressful?
- Did you find the statement ambiguous?
- Does the statement address the concept under which it is listed?
- Do you have suggestions for additional statements regarding the concept in question?
- Is the statement not applicable?

Shared Vision

1. My congregation engages in ongoing strategic planning.
2. Members have the opportunity to be involved in the planning process.
3. Jewish values are included in the mission statement of my congregation.
4. My congregation has the opportunity to be involved in the decision-making process.
5. My congregation's mission statement appears on various publications, notices, brochures, or mailings.
6. The goals of my congregation have specific goals related to all members to reach.

Record your thoughts on the questions in the above section (Shared Vision) in the box below. Do not make any marks outside of the box.

Please go on to the next page
<table>
<thead>
<tr>
<th>Member Empowerment</th>
</tr>
</thead>
<tbody>
<tr>
<td>7. The process for nominating leaders in my congregation does not provide opportunity for input from the membership.</td>
</tr>
<tr>
<td>8. I disagree.</td>
</tr>
<tr>
<td>9. My opinion regarding the timing of events has not been considered.</td>
</tr>
<tr>
<td>10. The leaders of my congregation are approachable and easily accessible.</td>
</tr>
<tr>
<td>11. In my congregation, I feel comfortable making suggestions regarding issues and programs even if my ideas are very different from the way things have been done in the past.</td>
</tr>
<tr>
<td>12. As a member of my congregation, I am able to express myself as a Jew.</td>
</tr>
<tr>
<td>13. Programming changes appear to reflect input from members of the congregation regarding past programs.</td>
</tr>
<tr>
<td>14. It is much easier to rise to leadership in my congregation if one has the resources to contribute large amounts of money.</td>
</tr>
<tr>
<td>15. I feel that I have been informed in a timely manner regarding the decisions that have been made at board meetings.</td>
</tr>
<tr>
<td>16. Members of the congregation are not encouraged to attend board meetings.</td>
</tr>
<tr>
<td>17. Auxiliary organization leadership (for example, Sisterhood, Brotherhood) is viewed as one possible step toward congregational leadership.</td>
</tr>
</tbody>
</table>

Record your thoughts on the questions in the above section (Member Empowerment) in the box below. Do not make any marks outside of the box. (More space on next page)
General Perceptions of Effectiveness

28. The membership base of my congregation appears to be growing.

29. The relationship between the congregation and our senior rabbi is mutually satisfying.

30. My congregation is not successful in carrying its programs to completion.

31. My congregation is generally able to meet its fundraising goals.

32. My congregation is innovating in developing programs.

Record your thoughts on the questions in the previous section (General Perceptions of Effectiveness) in the box below. Do not make any marks outside of the box.

Please mail your responses in the enclosed envelope to:

Tussy Shnider
105 Nob Hill Drive South
Gahanna, Ohio 43230

Thank you for your time and effort in completing this questionnaire.
APPENDIX E

COVER LETTERS

CONGREGATION A – LEADER

Dear (Congregation A) Board (Staff) Member,

(Congregation A) has been selected to participate in a research project. The Temple’s participation in this research has been approved by your President, (name), and by Rabbi (name). The purpose of this study is to obtain greater understanding of perceptions of the management practices and human experiences in our Reform congregations.

Have you ever wondered about the value of various management practices in contributing to the well-being of your congregation. Such concerns during my own years of volunteering in a Reform Jewish congregation led to my studies in nonprofit organization management and my desire to contribute to the body of knowledge regarding the effective functioning of our Reform congregations. Most of the research on congregation management has been done with churches of various denominations using Christian concepts and language. Based on both my experience and my studies, I am approaching management as it is done in Reform congregations with Jewish values and
Jewish expectations. This research project is part of the work toward my doctorate in the College of Social Work at The Ohio State University and it is being done with the cooperation of the Union of American Hebrew Congregations. The results of the study will be made available to the UAHC Department of Synagogue Management to assist in its work strengthening our Reform congregations.

The study is being conducted in two parts. The first part is a pilot study to refine the questionnaires that will be used in a survey of a multitude of Reform congregations. The second part is that survey. I am asking that you, as a leader of (Congregation A), participate in the pilot study. Your thoughtful consideration and the brief time it will take to respond to this questionnaire will be very much appreciated.

Your participation in this pilot study is voluntary and there is no penalty for not participating. Your responses will not be seen by anyone other than myself nor will anyone other than myself know who did or did not participate. Be assured that your responses will be confidential. While the questionnaires are coded, you will not be asked to put your name on your questionnaire, nor will you be identified in any way in the reporting of the data. (Congregation A) will be not identified in the reporting. Only the aggregated data results which cannot be associated with any individual will be reported. Your response will be kept locked in my home office and will be shredded when the study is completed.

There are two forms of the questionnaire that are being mailed to members of (Congregation A), one for Board members and staff and one for congregants that are not currently serving as Board members. I will meet briefly with the Board at the end of the
October 21 Board meeting in order to learn about your experience in responding to the Board member questionnaire. Please fill out the enclosed questionnaire and bring it with you to that meeting. If you will not be attending that meeting, please return it to me in the enclosed envelope by October 21. It will take approximately 30 to 45 minutes to complete the questionnaire. In return for your time and effort, I will provide your Board with a report of the findings and their implications for congregational management.

This study is being conducted under the supervision of my advisor, Dr. Thomas Gregoire, Assistant Professor, College of Social Work, The Ohio State University. If you have any questions you may contact me by phone at (phone number) or e-mail at (e-mail address).

Thank you so much for your time and effort as a leader of (Congregation A) and for your cooperation in this important research project. The knowledge gained as a result of your participation may be used by congregations throughout North America to enhance the experiences of their members.

Sincerely

D. Tussy Shnider

Doctoral Candidate

The Ohio State University
Dear (Congregation A) Member,

(Congregation A) has been selected to participate in a research project. The Temple’s participation in this research has been approved by your President, (name), and by Rabbi (name). The purpose of the study is to obtain greater understanding of perceptions of the management practices and human experiences in our Reform congregations.

Have you ever wondered about the impact of various management practices on the well-being of your congregation. Such concerns during my own years of volunteering in a Reform Jewish congregation led to my studies in nonprofit organization management and my desire to contribute to the body of knowledge regarding the effective functioning of congregations. Most of the research on congregation management has been done with churches of various denominations using Christian concepts and language. Based on both my experience and my studies, I am approaching management as it is done in Reform congregations with Jewish values and Jewish expectations. This research project is part of the work toward my doctorate in the College of Social Work at The Ohio State University and is being done with the cooperation of the Union of American Hebrew Congregations. The results of the study will be made available to the UAHC Department of Synagogue Management to assist in its work to strengthen our Reform congregations.

The study is being conducted in two parts. The first part is a pilot study to refine the questionnaires that will be used in a survey of a multitude of Reform congregations.
The second part is that survey. I am asking that you participate in the pilot study. Your thoughtful consideration and the brief time it will take to respond to this questionnaire will be very much appreciated.

Your participation in this pilot study is voluntary and there is no penalty for not participating. Your responses will not be seen by anyone other than myself nor will anyone other than myself know who did or did not participate. Be assured that your responses will be confidential. While the questionnaires are coded, you will not be asked to put your name on your questionnaire, nor will you be identified in any way in the reporting of the data. Temple Beth Shalom will be not identified in the reporting. Only the aggregated data results which cannot be associated with any individual will be reported. Your response will be kept locked in my home office and will be shredded when the study is completed.

Please fill out the enclosed questionnaire as soon as possible. It will take approximately 30 minutes to complete. Please return it to me in the enclosed envelope by October 29. In return for your time and effort, I will provide your Board with a report of the findings and their implications for congregational management.

This study is being conducted under the supervision of my advisor, Dr. Thomas Gregoire, Assistant Professor, College of Social Work, The Ohio State University. If you have any questions you may contact me by phone at (phone number) or e-mail at (e-mail address).
Thank you so much for your cooperation in this important research project. The knowledge gained as the result of your participation may be used by congregations throughout North America to enhance the experiences of their members.

Sincerely

D. Tussy Shnider
Doctoral Candidate
The Ohio State University

CONGREGATION A – MEMBER

Second Mailing

Dear (Congregation A) Member,

Have a bagel “on” Sammy and me!

Enclosed you will find a coupon for 3 free bagels from Sammy’s Bagels. Please enjoy some of Sammy’s great bagels as gift from Sammy and me. My hope is that while you are munching on this delicious treat, you will take a few minutes to complete the enclosed questionnaire. You see,

I need your help!

In order to complete the survey process and do the necessary analyses for my doctoral dissertation, it is necessary that more of these questionnaires be completed and returned. So, I am providing a second chance to respond – and some bagels, too!

As I stated in my earlier letter, your participation in this study is voluntary and there is no penalty for not participating. Your responses will not be seen by anyone other
than myself nor will anyone other than myself know who did or did not participate. Be assured that your responses will be confidential. While the questionnaires are coded for mailing purposes, you will not be asked to put your name on your questionnaire, nor will you be identified in any way in the reporting of the data. Temple Beth Shalom will be not identified in the reporting. Only the aggregated data results which cannot be associated with any individual will be reported. Your response will be kept locked in my home office and will be shredded when the study is completed.

Please fill out the enclosed questionnaire as soon as possible. It will take approximately 30 minutes to complete. Please return it to me in the enclosed envelope by April 12. In return for your time and effort, I will provide your Temple Board with a report of the findings and their implications for congregational management.

This study is being conducted under the supervision of my advisor, Dr. Thomas Gregoire, Assistant Professor, College of Social Work, The Ohio State University. If you have any questions you may contact me by phone at (phone number) or e-mail at (e-mail address).

Thank you so much for your help - and enjoy your bagels!

Sincerely,

Tussy Shnider

Doctoral Candidate

The Ohio State University
CONGREGATION B – LEADER

Dear (Congregation B) Board (Staff) Member,

Have a New York Bagel "on" me!

Enclosed you will find a coupon for 2 free bagels from New York Bagel and Deli. My hope is that while you are munching on this delicious treat, you will take a few minutes to complete the enclosed questionnaire.

I need your help! (Congregation B) has been selected to participate in a research project. The Temple’s participation in this research has been approved by your Executive Committee and by Rabbi (name). The purpose of this study is to develop a greater understanding of perceptions of the management practices and human experiences in our Reform congregations.

Have you ever wondered about the value of various management practices in contributing to the well-being of your congregation? Such concerns during my own years of volunteering in a Reform Jewish congregation led to my studies in nonprofit organization management and my desire to contribute to the body of knowledge regarding the effective functioning of our Reform congregations. I hope to learn more about management as it is done in Reform congregations with Jewish values and Jewish expectations. This research project is part of the work toward my doctorate in the College of Social Work at The Ohio State University.

I am interested in the opinions of (Congregation B) Board and staff members such as yourself. I have also sent a different survey to congregants who are not currently serving on the Board. It will take approximately 45 minutes to complete the Board member
questionnaire. Your thoughtful consideration and the brief time it will take to respond to this
questionnaire will be very much appreciated. Please return it to me in the enclosed envelope
by May 8. The coupon for bagels is my way of saying thank you!

Your participation in this study is voluntary and there is no penalty for not
participating. Your responses will be confidential. Your responses will not be seen by anyone
other than myself nor will anyone other than myself know who did or did not participate.
While the questionnaires are coded for mailing purposes, you will not be asked to put your
name on your questionnaire, nor will you be identified in any way in the reporting of the data.
Your response will be kept locked in my home office and will be shredded when the study is
completed.

In addition to using these results to write my doctoral dissertation, I will provide your
Board with a report of the findings and their implications for congregational management.
The results of the study will be made available to the UAHC Department of Synagogue
Management to assist in its work strengthening our Reform congregations. Only the
aggregated data results which cannot be associated with any individual will be reported.

This study is being conducted under the supervision of my advisor, Dr. Thomas
Gregoire, Assistant Professor, College of Social Work, The Ohio State University. If you
have any questions you may contact me by phone at (phone number) or e-mail at (e-mail
address), or Dr. Gregoire at (phone number) or (e-mail address).

Thank you so much for your cooperation in this important research project. By
furthering our understanding of the contribution of specific management practices to the
well-being of our Reform congregations we can better provide an environment that is
conducive to valuable spiritual, educational, and social experiences. The knowledge gained as a result of your participation may be used by congregations throughout North America.

Sincerely,

D. Tussy Shnider, MSW Tom Gregoire, PhD
Doctoral Candidate Assistant Professor
The Ohio State University The Ohio State University

**CONGREGATION B – MEMBER**

Dear *(Congregation B)* Member,

**Have a New York Bagel “on” me!**

Enclosed you will find a coupon for 2 free bagels from New York Bagel and Deli. My hope is that while you are munching on this delicious treat, you will take a few minutes to complete the enclosed questionnaire.

**I need your help!** *(Congregation B)* Congregation has been selected to participate in a research project. The Temple’s participation in this research has been approved by your Executive Committee and by Rabbi *(name)*. The purpose of this study is to develop a greater understanding of perceptions of the management practices and human experiences in our Reform congregations.

Have you ever wondered about the value of various management practices in contributing to the well-being of your congregation? Such concerns during my own years of volunteering in a Reform Jewish congregation led to my studies in nonprofit organization management and my desire to contribute to the body of knowledge regarding the effective
functioning of our Reform congregations. I hope to learn more about management as it is
done in Reform congregations with Jewish values and Jewish expectations. This research
project is part of the work toward my doctorate in the College of Social Work at The Ohio
State University.

I am interested in the opinions of (Congregation B) Board and staff members and of
congregants such as yourself. Your thoughtful consideration and the brief time it will take
to respond to this questionnaire will be very much appreciated. It will take approximately 30
minutes to complete the questionnaire. Please return it to me in the enclosed envelope by May

8. The coupon for bagels is my way of saying thank you!

Your participation in this study is voluntary and there is no penalty for not
participating. Your responses will be confidential. Your responses will not be seen by anyone
other than myself nor will anyone other than myself know who did or did not participate.
While the questionnaires are coded for mailing purposes, you will not be asked to put your
name on your questionnaire, nor will you be identified in any way in the reporting of the data.
Your response will be kept locked in my home office and will be shredded when the study is
completed.

In addition to using these results to write my doctoral dissertation, I will provide your
Board with a report of the findings and their implications for congregational management.
The results of the study will be made available to the UAHC Department of Synagogue
Management to assist in its work strengthening our Reform congregations. Only the
aggregated data results which cannot be associated with any individual will be reported.
This study is being conducted under the supervision of my advisor, Dr. Thomas Gregoire,
Assistant Professor, College of Social Work, The Ohio State University. If you have any questions you may contact me by phone at (phone number) or e-mail at (e-mail address), or Dr. Gregoire at (phone number) or (e-mail address).

Thank you so much for your cooperation in this important research project. By furthering our understanding of the contribution of specific management practices to the well being of our Reform congregations we can better provide an environment that is conducive to valuable spiritual, educational, and social experiences. The knowledge gained as a result of your participation may be used by congregations throughout North America.

Sincerely

D. Tussy Shnider, MSW  
Doctoral Candidate  
The Ohio State University

Tom Gregoire, PhD  
Assistant Professor  
The Ohio State University
APPENDIX F

REMINDER POSTCARD

CONGREGATION A

Reminder!!

Have you completed and returned your questionnaire!

Dear (Congregation A) Member,

Questionnaires were mailed to all (Congregation A) households several weeks ago. Even though the deadline has passed, the questionnaires are still being accepted and can be included in the study. **If you have not mailed it back, PLEASE do so NOW!**

If you need another questionnaire, please contact me at (phone number) or (email address). Another one will be sent to you. Remember, the knowledge gained by this research will be valuable in the management of (Congregation A) and other Reform congregations. Thank you in advance for your help.

Thank you — Tussy Shnider
APPENDIX G

MEMBER SCALES

SHARED VISION SCALE FOR MEMBERS

(# corresponds to the item number on the member questionnaire)

#1. My congregation engages in ongoing strategic planning.

#3. Jewish values are included in the mission statement of my congregation.

#5. My congregation's mission statement appears on various publications, notices, brochures, or mailings.

#6. The goals of my congregation have been made available for all members to read.

#34. My congregation is generally able to meet its fund-raising goals.

#36. My congregation is innovative in developing programs.
MEMBER EMPOWERMENT SCALE FOR MEMBERS

(# corresponds to the item number on the member questionnaire)

#2. Members' ideas are included in making decisions when planning programs or projects.

#4. I have been offered the opportunity for input in my congregation's planning process.

#7. The process for nominating leaders in my congregation does not provide opportunity for input from the membership.

#8. After a congregational event or program, members of my congregation are asked for their opinions regarding that event or program.

#9. My opinion regarding the timing of events has not been considered.

#10. Our board meetings are open to the members of the congregation.

#11. The leaders of my congregation are approachable and easily accessible.

#12. I feel that I have been informed in a timely manner regarding issues that will be deliberated at upcoming board meetings.

#13. In my congregation, I feel comfortable making suggestions regarding issues and programs even if my ideas are very different from the way things have been done in the past.

#14. My views as a congregation member are sought and included in board deliberations.

#16. It is easy to become involved in the life of my congregation, to participate in programs, projects and/or committee work.
#17. Programming changes appear to reflect input from members of the congregation regarding past programs.

#18. In my congregation leadership positions tend to stay in the hands of a small group of people.

#19. It is much easier to rise to leadership in my congregation if one has the resources to contribute large amounts of money.

#20. Diversity of opinion is welcomed and respected in my congregation.

#21. I feel that I have been informed in a timely manner regarding the decisions that have been made at board meetings.

#22. I feel valued and appreciated as a volunteer worker in my congregation.

#23. Members of the congregation are not encouraged to attend board meetings.

#24. In my congregation, members who put forth time and effort in volunteer activities have access to leadership positions, even the presidency.

#26. Leadership training opportunities are available to all interested members of the congregation.
EFFECTIVENESS SCALE FOR MEMBERS

(# corresponds to the item number on the member questionnaire)

#29. When members of my congregation gather, the conversation about the temple tends to be positive.

#30. The relationship between the congregation and our senior rabbi is mutually satisfying.

#31. My congregation is not fulfilling my needs.

#33. Being a member of this congregation satisfies me spiritually.

#35. My congregation is able to serve its members in a positive and competent manner.

#37. My congregation seems to be effective in finding solutions to problems.
APPENDIX H

LEADER SCALES

SHARED VISION SCALE FOR LEADERS

(# corresponds to the item number on the leader questionnaire)

#1. The board of my congregation has engaged in a process of identifying the core values of the congregation.

#2. The board of my congregation has developed a time-line for the achievement of long-term goals.

#3. The mission statement for my congregation was developed in a collaborative effort by leaders of the congregation.

#4. My congregation engages in ongoing strategic planning.

#5. The board of my congregation has established short-term goals for the congregation.

#6. My congregation’s mission statement appears on various publications, notices, brochures, or mailings.

#7. The board of my congregation periodically reviews the mission and goals for the congregation.
#8. Jewish values are included in the mission statement for the congregation.

#9. The board of my congregation has established a written mission statement for the congregation.

#10. The board of my congregation has established long-term goals for the congregation.

#12. The board of my congregation has established specific strategies to achieve the goals of the congregation.

#63. My congregation is generally able to meet its fund-raising goals.

#65. My congregation is innovative in developing programs.

BOARD DEVELOPMENT SCALE FOR LEADERS

(# corresponds to the item number on the leader questionnaire)

#13. The board of my congregation focuses on policies of the congregation rather than the day-to-day operation of the temple.

#14. The board of my congregation puts little time and effort into board education.

#15. I am aware of my congregation’s short-term goals.

#16. The board of my congregation routinely engages in Torah study at our meetings.

#17. The board of my congregation considers the process for dealing with issues to be as important as the substance of the issues.

#18. When making decisions, the board of my congregation includes lessons from Jewish texts in the process of determining the best conclusion.
#19. The board of my congregation engages in ongoing board training experiences. (Examples include such activities as retreats, field trips, and mini-lessons at board meetings.)

#20. I am aware of my congregation’s long-term goals.

#21. In my congregation, the responsibilities of the clergy, staff, and board are not well delineated.

#22. The board of my congregation participates in opportunities for education and leadership training offered by the Union of American Hebrew Congregations and its regional offices. (Examples include sending a delegation to the biennial conventions and attending visits by UAHC representatives.)

#23. The board of my congregation develops leadership training programs for members of the board.

**SELF-EVALUATION SCALE FOR LEADERS**

(# corresponds to the item number on the leader questionnaire)

#24. After a congregational event or program, members of my congregation are asked for their opinions regarding that event or program.

#25. Our board has no formal practice of evaluating the process by which decisions are made and issues resolved.

#26. The board of my congregation periodically measures progress toward the achievement of the congregation’s goals.
#27. When evaluating programs or projects, the board includes Jewish values as a part of its review process.

#28. Our board periodically evaluates the performance of programs and projects in terms of the mission and goals of the congregation.

#29. The planners of projects engage in a formal evaluation of the event when such events are completed.

#30. The board of my congregation evaluates its own performance in some recurring and systematic manner.

**MEMBER EMPOWERMENT SCALE FOR LEADERS**

(# corresponds to the item number on the leader questionnaire)

#11. Members’ ideas are included in making decisions when planning programs or projects.

#31. My opinion regarding the timing of events has not been considered.

#32. As a member of the board, I am able to make good decisions because I am provided with adequate information about issues in a timely manner.

#33. As a board member, I am encouraged to ask questions regarding issues on which I will be voting.

#34. When board members are considering an issue, alternative perspectives are presented for examination.

#35. Our board meetings are open to members of the congregation.

#36. The nomination process delineated in our congregation’s documents is followed.
#37. Our congregants are not informed in a timely manner regarding issues that will be deliberated at upcoming board meetings.

#38. In my congregation, I feel comfortable making suggestions regarding issues and programs even if my ideas are very different from the way things have been done in the past.

#39. The views of my congregation’s members are sought and included in board deliberations.

#40. The nominating process for leadership is clearly delineated in our congregation’s documents.

#42. The process for nominating leaders in my congregation does not provide opportunity for input from the membership.

#43. Members of the congregation are not encouraged to attend board meetings.

#44. Board members are not well informed regarding issues facing my congregation.

#45. It is easy to become involved in the life of my congregation, to participate in programs, projects, and/or committee work.

#46. In my congregation leadership positions stay in the hands of a small group of people.

#47. It is much easier to rise to leadership in my congregation if one has the resources to contribute large amounts of money.

#48. Diversity of opinion is welcomed and respected in my congregation.

#49. Our congregants are informed in a timely manner regarding decisions that have been made at board meetings.
#50. I feel valued and appreciated as a volunteer worker in my congregation.

#51. The leaders of my congregation are approachable and easily accessible.

#52. In my congregation, members who put forth time and effort in volunteer activities have access to leadership positions, even the presidency.

#53. Most of the congregation’s decisions are really made by a small core group of leaders; the board vote is a formality that “rubber stamps” those decisions.

#55. Leadership training opportunities are available to all interested members of the congregation.

**EFFECTIVENESS SCALE FOR LEADERS**

(# corresponds to the item number on the leader questionnaire)

#58. When members of my congregation gather, the conversation about the temple tends to be positive.

#59. The relationship between the congregation and our senior rabbi is mutually satisfying.

#60. My congregation is not fulfilling my needs.

#62. Being a member of this congregation satisfies me spiritually.

#64. My congregation is able to serve its members in a positive and competent manner.

#66. My congregation seems to be effective in finding solutions to problems.