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A Reflection Paper for Competency 3d: Implementing Change

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by

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Introduction

[The Matzevah Foundation, Inc.](#) (TMF) is a legally and duly established nonprofit organization (NPO) in the State of Georgia. TMF grew out of my ministry as a Baptist pastor in Poland. I wanted to speak to the injustice of the Shoah by caring for and restoring Jewish cemeteries in Poland. My purpose was not to become ceaselessly involved in gardening, i.e., overcoming 70 plus years of neglect and undergrowth in Poland's more than 1,200 Jewish cemeteries, but someone, who pursued dialogue and reconciliation with Jews of Polish heritage.

I founded TMF and established it with a group of Baptist friends in 2010. These friends had worked with me from the first days of the Jewish cemetery restoration projects that I led as a pastor in Poland. When we established TMF, we knew that we wanted to continue caring for and restoring Jewish cemeteries and thereby pursue dialogue and reconciliation. But how were we to proceed, along such a path as an NPO? And, much more, how were we to achieve such a mission as a not-for-profit business? Answering such questions would require transforming a rag-tag group of followers into a well-defined, structured, and developed NPO. To undertake such a challenging endeavor, all of us would have to become pioneers and change by becoming servants of TMF's mission.

I am the president of TMF, and as such, I would have to lead the way forward. Navigating and negotiating change would require, of me, leadership skills to implement change in the development of TMF. In this paper, I will consider four primary change theories and reflect upon how I applied these theories and their implementation in TMF over the past ten years. Implementing change has been challenging and, at times, taxing; nonetheless, TMF has grown from infancy to adulthood as it matured and became what it is today as a leader in the field of Jewish cemetery restoration, and Jewish-Christian dialogue and reconciliation.

CHAPTER 1

THEORETICAL CONSIDERATIONS

Definitions of Key Terms

Change. A simple explanation of the concept of change is altering or making something different. Organizationally speaking, change, in and of itself, is subjective and may be understood as the “immediate effect and what we expect or hope for” (Schein, 1985, p. 298). Furthermore, as Schein (1985) contends, how someone views change “may also depend on one’s time horizon,” and also, determining whether or not something has changed “may depend on one’s goals” (p. 298).

Competency 3d: Implementing Change. The Andrews University Leadership Department advances a set of leadership competencies, which require students to have “theoretical knowledge and practical application” within a set of “core [leadership] competencies” of which the “leadership through organizations” is one group of competencies (*Leadership Handbook*, 2011, p. 36). The third group of leadership competencies addresses “the organizational aspects of leadership. Leadership sets direction in ways that facilitate achievement of organizational goals” (*Leadership Handbook*, 2011, p. 36). Regarding the competency of implementing change, “*Leadership involves working with others in order to collaboratively*

shape the vision and strategy for change, as well as being capable of facilitating the change process” (Leadership Handbook, 2011, p. 37).

Jewish Cemetery. Several terms are employed to describe a Jewish cemetery in Hebrew. It is referred to as *Beit Chaim*—“the house of the living,” *Beit Keverot*—“the house of graves or tombs,” or *Beit Olam*—“the house of the world or eternity.” Cemeteries are considered to be holy places by the Jewish community.

Matzevah. The term *matzevah* (מצבה) is Hebrew and means a memorial stone or monument; a matzevah is erected in memory of a significant event or placed at the head of the grave of a deceased person. In Jewish cemeteries, the headstone or matzevah signifies remembering and honoring the dead and ensures that the grave will not be desecrated. The Matzevah Foundation uses the iconography of the matzevah because its mission is to honor the memory of the Jewish community of Poland by caring for and restoring Jewish cemeteries in Poland as a means to reconcile Jews and Christians.

Organizational Culture. Schein (1985) considers that “organizations are not easy to define in time and space,” and they are, he reasons, “open systems in constant interaction with their many environments,” consisting of numerous “subgroups, occupational units, hierarchical layers, and geographically dispersed segments” (p. 7). He defines culture as:

A pattern of basic assumptions—invented, discovered, or developed by a given group as it learns to cope with its problems of external adaptation and internal integration—that has worked well enough to be considered valid and therefore, to be taught to new members as the correct way to perceive, think, and feel in relation to those problems (p. 9).

Shoah. Unless citing a source that uses the term Holocaust, I will use the Hebrew term, *Shoah* (catastrophe, or destruction), to define the events of what many refer to as the Holocaust. I make this distinction for two reasons. First, as Manosevitz (2010) emphasizes, the term Shoah is “used by modern scholars in reference to that event,” and second, the word, Holocaust, is a

Greek word that means “burnt offering,” which according to Manosevitz extends some type of “religious significance” to the event, adding that “there was nothing religious about Hitler's ‘Final Solution’” (p. 55).

Background

In my experience, change is always difficult and demanding. I have learned to deal with change in my life practically and not theoretically. When I was a child, my family moved frequently. Consequently, I seemed to be always the new kid. Being an introvert, I had to learn to overcome my natural shyness and quietness. To this end, I became an intuitive observer, who learned to assess and analyze new situations to determine how to best deal with them.

Later in life, my wife and I decided to move our family to live and work in Poland. This required of us tremendous change because we had to learn to speak and function in the Polish language as ministers. Likewise, we had to learn to be cross-cultural change agents, and work with members of Polish Baptist churches to grow and develop churches to reach their communities for Jesus Christ. In the midst of all of this change, I had to become a leader of a team of pastors who would do the same with other Baptist groups and churches.

Before entering the Andrews University Leadership Program, I had never studied change theories, as well as, leading and implementing change. From my pastoral experience, I learned three important principles: how to cast vision, how to build consensus toward the pursuit of mission, and how to equip others to build up the body (of Christ) and equip the saints for the work of ministry (Ephesians 4:12). I carried these principles forward with me when a small group of friends and I established TMF in 2010.

In my work experience in organizations, managing and implementing change, typically, are not well handled by leadership. I did not wish to continue such a pattern in my leadership of

TMF. Therefore, I have read and studied change theory as a part of my Andrews experience, and I have shared some of what I have learned with our board. I have also applied various change theories to my work in leading TMF as the board has labored to structure and develop the organization. My reflection paper will capture some of my journey in leading and implementing change in the growth and development of TMF.

Change as a Process

Schein (1985) theorizes that “all change . . . is motivated;” nonetheless, not all changes occur or progress in the manner that the change agents wish for them to proceed (p. 300). What his statement implies is that “much of what actually happens as a consequence of initial change efforts may be unplanned and unintended” (pp. 300-301). Schein reasons that this outcome is due to a change agent miscalculating “the effects of their actions or may be unaware of other forces” acting at the same time (p. 301). Furthermore, Schein enumerates several process models related to change of which two are relevant for me to consider: change as a revolutionary process and change as a managed process.

First, as stated by Schein (1985), the majority of organizational theorists “implicitly assume a revolutionary model” when the variable of power is being considered “in human organizations” (p. 308). “Power struggles” within human systems and interactions “inevitably will lead to some form of revolutionary process” (p. 308), Schein contends. In such a revolutionary system of change, power is determined “in terms of actual control of resources, the ability to reward or punish, and the possession of critical items of information” (Schein, 1985, p. 308). Second, the framework of “managed change attempts to focus on and build a theory around those forces that can to some degree be controlled” (Schein, 1985, p. 309).

Principal Change Models

Kotter's Change Model

The principles of Kotter's 8-Step Process for Leading Change are a highly useful and practical tool for leading change because Kotter's principles outline a series of steps designed to facilitate leading the change process. Kotter has demonstrated through research that "70% of all major change efforts in organizations fail . . . because organizations often do not take the holistic approach required to see the change through" ("The 8-step process for leading change," 2012, para. 1). Furthermore, organizations "can increase their chances of success" by employing "the 8 Step Process outlined by Professor Kotter" ("The 8-step process for leading change," 2012, para. 3). Below are Kotter's 2012 eight principles for leading change (cited in, *Guidelines for implementing process safety management*, 2016, p. 47):

1. Establishing a sense of urgency
2. Creating the Guiding Coalition
3. Developing a Change Vision
4. Communicating the Vision for Buy-in
5. Empowering Broad-based Action
6. Generating Short-term Wins
7. Never Letting Up
8. Incorporating Changes into the Culture

When considering Kotter's first step, creating a sense of urgency means leading people to realize their condition, or the state in which they are in, and begin to consider possibilities of moving forward, i.e., change the status quo of their situation. Second, in 2012, Kotter stated that leading change requires assembling a team—a group of people "with enough power to lead the

change effort, and encourage the group to work as a team” (cited in, *Guidelines for implementing process safety management*, 2016, p. 47).

Changing the vision of the team is the third developmental step in Kotter’s change model; it involves creating a vision “to help direct the change effort, and develop strategies for achieving that vision” (cited in, *Guidelines for implementing process safety management*, 2016, p. 47).

Elsewhere, Kotter (1990) proposes, “Since the function of leadership is to produce change, setting the direction of that change is fundamental to leadership” (p. 87).

Moreover, it is critically vital to realize, as Kotter (1990) argues,

Setting direction is never the same as planning or even long-term planning, although people often confuse the two. Planning is a management process, deductive in nature and designed to produce orderly results, not change. Setting a direction is more inductive. Leaders gather a broad range of data and look for patterns, relationships, and linkages that help explain things. What's more, the direction-setting aspect of leadership does not produce plans; it creates vision and strategies. These describe a business, technology, or corporate culture in terms of what it should become over the long term and articulate a feasible way of achieving this goal (p. 87).

Fourth, it is vital to develop “buy-in” from everyone associated with the change process, i.e., “make sure as many as possible understand and accept the vision and the strategy” (cited in, *Guidelines for implementing process safety management*, 2016, p. 47). Likewise, Kotter advises leaders to “remove obstacles to change, change systems or structures that seriously undermine the vision, and encourage risk-taking and nontraditional ideas, activities, and actions” (cited in, *Guidelines for implementing process safety management*, 2016, p. 47). Subsequently, Kotter advises that leaders should “plan for visible performance improvements, create those improvements, recognize and reward employees involved in the improvements” (cited in, *Guidelines for implementing process safety management*, 2016, p. 47).

Seventh, Kotter directs leadership to use the

. . . increased credibility to change systems, structures, and policies that don't fit the vision, also hire, promote, and develop employees who can implement the vision, and finally reinvigorate the process with new projects, themes, and change agents (cited in, *Guidelines for implementing process safety management*, 2016, p. 47).

And finally, Kotter states that leaders must articulate “the connections between the new behaviors and organizational success, and develop the means to ensure leadership development and succession” (cited in, *Guidelines for implementing process safety management*, 2016, p. 47).

Transformational Leadership Theory (Burn/Bass)

According to R. L. Hughes, Ginnett, and Curphy (2012), Burn’s theory on transformational leadership has its roots in charismatic leadership, which views leadership as transforming due to the fact that leaders transform, i.e. change, the status quo by casting a vision of a better future that “is intimately linked to the values of both the leader and the followers” (p. 577). This determination reflects Kotter’s third consideration of casting vision “to help direct the change effort, and develop strategies for achieving that vision” (cited in, *Guidelines for implementing process safety management*, 2016, p. 47). Another key component of transforming leaders found, in R. L. Hughes et al. (2012), is that transforming leaders are able to reframe issues in terms that “point out how the problems or issues facing followers can be resolved,” if they implement “the leader’s vision of the future” (p. 577).

One interesting aspect of Burn’s theory of transforming leadership is that transforming leaders “teach followers how to become leaders,” and lead them to take on “active roles in the change movement” (R. L. Hughes et al., 2012, p. 577). Transforming leadership for Burns essentially is expressed best by the relationship that exists between the leader and the follower on the basis of shared values. Transforming leaders “change the status quo by appealing to followers’ values and their sense of higher purpose,” which “is intimately linked to the values of

both the leader and the followers,” and “it represents an ideal that is congruent with their value systems” (p. 577). Furthermore, Burns views transforming leadership as “ultimately a moral exercise in that it raises the standards of human conduct” (p. 577). The research indicates an “overwhelming support for the notion that transformational leaders are effective at large-scale societal or organizational change” (R. L. Hughes et al., 2012, p. 581).

Leader Member Exchange Theory

As discussed by R. L. Hughes et al. (2012), “leadership is contingent on the interplay” of the numerous aspects of the leader, follower, and situation (LFS) model (p. 520). One of these contingency theories is the Leader-Member Exchange (LMX) Theory. LMX focuses on developing other people in terms of an ongoing dyadic relationship between the leader and “all followers” (p. 521). The premise of the LMX Theory is that leaders do not interact with all followers equally, but do so based on the specific relationship that they have with “each subordinate” (p. 521). The leader, therefore, has a “series of dyadic relationships” which can be classified into two major groups: “In-Groups” and “Out-Groups” (p. 521).

In R. L. Hughes et al. (2012), we see that the LMX Theory considers “out-groups” to be “low quality exchanges” between the leader and the subordinates centered on what is required to do the job with little “interpersonal interaction” (p. 521). On the other hand, with “in-group” subordinates, the leader works to develop “high-quality exchange relationships” that well exceed the task or “just what the job requires” (p. 521). This type of relationship, as R. L. Hughes et al. (2012) indicate, is truly “exchanges” due to the fact that “both parties benefit,” and furthermore, we see in this dynamic that subordinates who contribute “higher levels of task performance” may be rewarded by the leader with “empowerment, sponsorship of subordinates in social networks,

and mentoring” (p. 521). The LMX Theory entails three primary components: role-taking, role-making and routinization (p. 521).

Additionally, we learn, in R. L. Hughes et al. (2012), that based on the work of Graen and Uhl-Bein in 1995, the LMX leadership model has changed from a “describing process to proposing a prescriptive process” toward enhancing “organizational effectiveness” (p. 522). In view of this aspect, leaders should act to “develop relationships and build more in-group relationships” (p. 522) among all followers. In other words, the leader’s goal should be to increase organizational effectiveness by moving or developing more followers in the in-groups and “reducing the number” of followers in the “out-groups” (p. 522).

To this end, the leader should focus on developing “special” relationships with all followers, and extend to all subordinates opportunities for “new roles, responsibilities, and challenges” (p. 522). And, the leader needs “to nurture high-quality exchanges with all followers” focusing on building “trust and respect” with each one (p. 522). If this process is followed then unity of purpose is achieved for work of the organization instead of a fragmented approach centering on the inconsistencies “between in-groups and out-groups” (p. 522).

Discursive Framework of Organizational Changing

Jian (2011) introduces a concept of organizational *changing* from one stage to the next by examining and contemplating a “discursive framework grounded in a process-oriented perspective of organization” (p. 45). Essentially, Jian proposes a discursive model of organizational change. Discursive means “proceeding coherently from topic to topic” or “marked by analytical reasoning” (Merriam-Webster, 2012). Jian’s introduces a model for the progression of change through a series of steps or stages, which he calls “discursive struggles” that concern “multiple layers” of interrelated components found within organizational structures, such as

“organizational circumstance, organizational and individual identities and organizational practice” (p. 45).

In his study, Jian (2011) considers the theories of “organizational communication and discourse, sensemaking and identity theories,” produced by “real-time communicative interactions among organizational members” over the course of a “four-month ethnographic study in a large US insurance corporation” (p. 46). Jian contrasts “organizational changing versus organizational change” and then develops “a discursive framework of organizational changing” (p. 46).

Furthermore, there are three contributions made by Jian’s (2011) study to theories of organizational change. First, he addresses “the way in which discursive actions transforms organizational reality,” and second, he provides “an in-depth analysis of changing as shaped in interrelated layers of articulation” (p. 46). Third, the analysis Jian demonstrates “how synoptic stage models . . . could be deployed in practice as discursive devices for the purpose of identity regulation,” as Alvesson and Willmott postulated in 2002, and Deetz’s 1992 concept of “discursive closure” (Jian, 2011, p. 46). Subsequently, Jian concludes that due to the fact that various studies “point to the complexity and consequential effects of discourse and communication,” along with addressing “particular issues related to changing” requires another “conceptual framework” that would integrate “key discursive dynamics” (p. 47).

From a theoretical standpoint, Jian (2011) is looking at the process of organizational changing through a series of steps that he calls, “discursive struggles” that impact multiple levels of interrelated components found within organizational structures. First, he addresses “organizational changing as discursive struggle over articulation,” which means that a “discourse or meaning system” is applied to or “articulated” in a broad range of concepts or expressions of

thought on a particular subject (p. 48). Jian uses the analogy of “household tasks performed by staying-at-home mothers” as method to give meaning to a broad range of concepts (discourses), “such as child-rearing, work and labour [*sic*], feminism, etc.” (p. 48). He adds that this meaning pattern can be applied to other contexts such as the corporate world where “their meaning is associated with such managerial tasks as planning, budgeting and oversight,” as Medved and Kirby indicate in 2005 (p. 48).

Jian (2011) next addresses “articulating organizational circumstance” which he considers “an important layer of meaning formation during the changing process because the reason to change is often attributed to shifts in organizational conditions” (p. 48). Third, he considers the concept of “articulating organizational identity” which is “a discursive action in which managers and other organizational stakeholders . . . assign meaning to a collective with regard to its goals, values, and beliefs within particular discourses” (p. 49).

The fourth construct of the discursive framework of Jian (2011) is what he calls “articulating individual identity” which is related to “identity theory,” and concerns “identity work” (p. 49). Identity, in these light, is seen as “forming, repairing, maintaining, strengthening or revising the constructions that are productive of a precarious sense of coherence and distinctiveness” of the individual (p. 49). Break downs or failures in the identity and identity work discourse “have been shown to produce disturbances, disruptions and unintended consequences to the changing process” (p. 49).

The fifth and final construct that Jian (2011) discusses is “articulating organizational practice,” which he describes as “the formative process of practice, which gives meaning to doing” (p. 50). Therefore, based on the 1985 research of Laclau and Mouffe, 1985, Jian surmises

“a process-oriented discursive approach argues that organizational practice emerges in discourse and is always part of it” (p. 50).

Summary

Change is a process. Schein (1985) theorizes that “all change . . . is motivated;” nonetheless, not all changes occur or progress in the manner that the change agents wish for them to proceed (p. 300). Schein reasons that “much of what actually happens as a consequence of initial change efforts may be unplanned and unintended” (pp. 300-301). Unexpected results are a reality in leading and implementing change. As Schein indicates, leaders may miscalculate “the effects of their actions or may be unaware of other forces” acting at the same time (p. 301). Furthermore, Schein enumerates several process models related to change of which two are relevant for me to consider: change as a revolutionary process and change as a managed process.

I discussed four change theories in this chapter: Kotter’s 8-Step Model for Leading Change, Transformational Leadership Theory, Leader Member Exchange, and Discursive Framework of Organizational Changing. Kotter’s change model appears to be one of managed change in which a leader attempts to develop and lead change by creating urgency, casting a vision for change, building a team to lead change, etc.

Transforming leaders “change the status quo by appealing to followers’ values and their sense of higher purpose,” which “is intimately linked to the values of both the leader and the followers,” and “it represents an ideal that is congruent with their value systems” (R. L. Hughes et al., 2012, p. 577). Jian (2011) introduces a concept of organizational *changing* from one stage to the next by examining and contemplating a “discursive framework grounded in a process-oriented perspective of organization” (p. 45). In Chapter 2, I will discuss how I have applied Kotter’s model of change and Jian’s discursive change model to the work of TMF.

CHAPTER 2

APPLYING THEORY TO PRACTICE

In Chapter 2, first, I will consider four principles related to implementing change in NPOs. These principles do not flow out of a particular change theory, but are derived from evaluations, or analysis discussed in an article by Glassey (2003) regarding how change operates amongst the BODs of NPOs. I will briefly discuss in what ways these change principles affect the BOD of TMF. Second, I will organize my examination of select change theories and their application to the work of TMF through two of Schein's (1985) process models of change: managed and revolutionary change.

Implementing Change in NPOs

Glassey (2003) recalls Thomas Holland's 1996 article, "*How to Build A More Effective Board,*" in which Holland provides insights and advice on developing boards of nonprofit organizations (NPOs). According to Glassey (2003), Holland "observed that for board development to succeed, the entire board must be ready for change," which seems to be "easier said than done" (p. 7). Likewise, Glassey maintains that "to effectively introduce the change, it may require a few members of the board to leave" (p. 7). Moreover, based on Robinson's work in 2001, Glassey (2003) argues that "good boards rarely change overnight," and they "change

because *they* want to change” (p. 7). Concluding, she affirms that boards change “because *they* believe that the mission of the organization deserves the best board possible” (p. 7).

I think that all four change considerations for NPOs that Glassey (2003) introduces above are relevant to the work of TMF. First, from the very beginning of TMF, the board of directors (BOD), knew it had to change, and subsequently, it has been modifying itself and its work since its inception ten years ago. The BOD knew that we had to learn how to function and operate as a NPO to realize TMF’s mission. Second, as we have developed and implemented change, four of the founding board members of TMF have resigned, departed, or changed their relationship to BOD for various reasons.

Third, time is necessary for any board to change; but more so for TMF. The original BOD established TMF from ground zero as a group of novices having absolutely no nonprofit experience. Thus, as I noted earlier, the BOD had to learn what needed to be done as we developed and operated TMF. Finally, I think that the original board members of TMF believed in its mission; however, some may have had different ideas about how to pursue it, or they did not understand their role, or they did not have the time to give to its development. Ultimately, the remaining board members and the new board members who replaced those that resigned, believe in the mission of TMF, and are collectively and collaboratively willing to improve its operation.

Change as a Managed Process

As noted above, Schein (1985) enumerates several process models related to change of which two are relevant for me to consider: change as a managed process and change as a revolutionary process. I will discuss change as a revolutionary process later; however, in this section, I will consider managed change. Schein (1985) reasons that managed change theorists attempt “to focus on and build a theory around those forces that can to some degree be

controlled” (p. 309). I will discuss two change theories that I consider to be managed change theories and their application to implementing change in TMF.

Kotter’s Eight-Step Change Model

At first glance, it seems to me that Kotter’s 8-Step Model for Leading Change is a recipe driven and a managerial approach for implementing change, which guarantees a successful change process if leaders follow Kotter’s eight simple steps. In my experience, leadership is not recipe driven, but instead, driven by the need for the leader to adapt and adjust to both the need of the situation and the followers involved. Nonetheless, what I find useful from Kotter’s model are his principles embedded in his model and not necessarily the sequential steps, he lays out in leading change. R. L. Hughes et al. (2012) state, "The best leaders are those who recognize the situational and follower factors inhibiting or facilitating change, paint a compelling vision of the future, and formulate and execute a plan that moves their vision from a dream to reality" (p. 556).

When considering Kotter’s first step, I worked, in 2012, to create a sense of urgency within our board to address the need to personalize and develop our BOD, so that we could execute the mission of TMF. Second, Kotter stated that leading change requires assembling a team—a group of people “with enough power to lead the change effort, and encourage the group to work as a team” (cited in, *Guidelines for implementing process safety management*, 2016, p. 47). I had assembled the BOD; nonetheless, it was in a process of transformation as board members began to depart in 2013.

In Kotter’s third step, he advises leaders to create a vision for the team “to help direct the change effort, and develop strategies for achieving that vision” (cited in, *Guidelines for implementing process safety management*, 2016, p. 47). I did not need to change the vision of

TMF; instead, I needed to change the vision that the BOD had of itself as the leaders of TMF. I shared with the BOD two of Kotter's articles.

Kotter (1990) states, "Since the function of leadership is to produce change, setting the direction of that change is fundamental to leadership" (p. 87). I attempted to do this within the BOD. Thus, I shared with the board a few quotes from Kotter's articles regarding the difference between leadership and management (**Artifact:** [Leadership and Management](#)). I emphasized that as a leader, my role was to lead and set the direction, while the role of the BOD was to assist me administer and manage TMF. I pointed out that Kotter (1990) asserts, "Setting direction is never the same as planning . . . Planning is a management process, deductive in nature and designed to produce orderly results, not change" (p. 87).

Moreover, we were dealing with organizational chaos after two board members resigned by the end of 2013, so we had a great deal of ongoing change. Consequently, in the midst of such chaos, I noticed a potential power struggle brewing. I sensed that some board members wanted to over manage TMF, and therefore, focused more attention on putting in place administrative structures and processes to stabilize the organization, instead of balancing leadership and management tasks. Consistently, I shared with them what Kotter (1990) had stated: "Most U.S. corporations today are overmanaged and under led" (p. 85). I pointed out that my role, as a leader, was setting the direction, because as Kotter (1990) indicates leadership "does not produce plans; it creates vision and strategies" (p. 87). How to balance leadership and management of TMF was the challenge we were trying to address.

Kotter's fourth step, is developing "buy-in" from everyone associated with the change process, i.e., making "sure as many as possible understand and accept the vision and the strategy" (cited in, *Guidelines for implementing process safety management*, 2016, p. 47). I

attempted to do this by beginning every TMF board meeting with a review of our vision, mission, and organizational objectives. I consistently focused us on growing and developing partners, participants, and projects (**Artifact:** [TMF Vision, Mission, and JCR Projects](#)).

Fifth, as Kotter advises, leaders need to “remove obstacles to change, change systems or structures that seriously undermine the vision, and encourage risk-taking and nontraditional ideas, activities, and actions” (cited in, *Guidelines for implementing process safety management*, 2016, p. 47). First, I removed obstacles by recommending that the BOD elect an ad-hoc committee for governance to oversee amending the TMF By-Laws and restructuring of the BOD. Second, for the governance committee, I prepared a road map, laying out key steps and outlining a process of amending TMF’s By-Laws and restructuring the BOD (**Artifact:** [Process of Amending TMF By-Laws](#)).

Finally, Kotter states that leaders must articulate “the connections between the new behaviors and organizational success, and develop the means to ensure leadership development and succession” (cited in, *Guidelines for implementing process safety management*, 2016, p. 47). During the long, two-plus year process of amending TMF’s By-Laws, we did amend TMF’s By-Laws, which allowed us to restructure the BOD and begin to develop administrative policies and procedures that functionally changed and allowed TMF to do more than it had been capable of doing previously.

Discursive Framework of Organizational Changing

Jian (2011) introduces a model for the progression of change—***changing*** in organizations through a series of steps or stages, which he calls “discursive struggles” that concern “multiple layers” of interrelated components found within organizational structures, such as “organizational circumstance, organizational and individual identities and organizational

practice” (p. 45). Jain’s framework well describes the complexity of what it was like for our BOD in the early days of TMF. None of us had any nonprofit experience. I had led pastoral teams within an existing organizational structure, but I had not begun or operated a business previously.

I compare those early days of developing and structuring the work of TMF to be like building a car, while it is already in motion, and without having any clear idea regarding what a car is supposed to look like. Similarly, TMF was rolling along and we had no idea how to do what we were supposed to do in developing a NPO and its work.

Jian (2011) addresses “articulating organizational circumstance” which he considers “an important layer of meaning formation during the changing process because the reason to change is often attributed to shifts in organizational conditions” (p. 48). TMF shifted its focus early on toward organizing its mission to care for and restore Jewish cemeteries in Poland instead of developing its organizational structure. In 2012, TMF conducted its first actual Jewish restoration project. We were able to organize and implement the project without having much organizational structure in place. Roles and functions were task specific to the project itself, and were not directly related to functioning of TMF in the US.

Likewise, Jian (2011) considers the concept of “articulating organizational identity” which he describes as “a discursive action in which managers and other organizational stakeholders . . . assign meaning to a collective with regard to its goals, values, and beliefs within particular discourses” (p. 49). I take this notion to mean that the board of TMF and its “stakeholders,” i.e., volunteer staff, had to determine our values, beliefs, goals and objectives for the organization. I have led TMF and its volunteer staff to identify its values, beliefs, and goals on several occasions, which I will discuss in Chapter 3.

Moreover, as a board, we had to learn to do what Jian (2011) calls “articulating individual identity,” which is related to “identity theory,” and concerns “identity work”. (p. 49). Identity, in this light, is seen as “forming, repairing, maintaining, strengthening or revising the constructions that are productive of a precarious sense of coherence and distinctiveness” of the individual (p. 49). Break downs or failures in the identity and identity work discourse “have been shown to produce disturbances, disruptions and unintended consequences to the changing process” (p. 49). We have experienced these disturbances and disruptions in TMF, which, I surmise, have led to the resignations and departures from the board of TMF.

Finally, Jian (2011) discusses “articulating organizational practice,” which he describes as “the formative process of practice, which gives meaning to doing” (p. 50). Thus, based on the 1985 research of Laclau and Mouffe, Jian surmises that “a process-oriented discursive approach argues that organizational practice emerges in discourse and [discourse] is always part of it” (p. 50). I think that Jian’s model although quite complicated in its essence has value for me in leading TMF; Jian’s model appropriately articulates or gives meaning to change. Lastly and possibly more importantly, Jian’s model allowed me to provide leadership concerning the articulation of “organizational identity” because ongoing changes in TMF turned out to be a contentious issue as we developed and formalized TMF’s organizational values and culture.

Change as a Revolutionary Process

Schein (1985) theorizes that “all change . . . is motivated;” nonetheless, not all changes occur or progress in the manner that the change agents wish for them to proceed (p. 300). This means that not all change can be managed. Thus, I find Schein’s notion to be true in relationship to leading change in TMF. In this section, I will discuss how the consequences of change

initiatives that I led in TMF had outcomes that were “unplanned and unintended” (p. 301), and more so, how these outcomes were very distressing and troublesome for me and the BOD.

Furthermore, Schein (1985) reasons that such unexpected outcomes are due to a change agent miscalculating “the effects of their actions or may be unaware of other forces” acting at the same time (p. 301). I concur with Schein’s conclusion, and I will add that I encountered such “forces” as hidden agendas within TMF’s board and advisory board that directly influenced and worked to disrupt and delay needed change within the processes, procedures, and policies of TMF.

Finally, Schein (1985) considers that the majority of organizational theorists “implicitly assume a revolutionary model” when the variable of power is being considered “in human organizations” (p. 308). “Power struggles” within human systems and interactions “inevitably will lead to some form of revolutionary process” (p. 308), Schein contends. In such a revolutionary system of change, power is determined “in terms of actual control of resources, the ability to reward or punish, and the possession of critical items of information” (Schein, 1985, p. 308).

Amending TMF By-Laws and Board Restructuring

I have written elsewhere in other reflection papers (e.g., Competency 3a and 3c) about the process of amending TMF By-Laws, and restructuring the BOD. I have stated that conflict was directly involved at various stages throughout the change process that I set in motion in 2012. Thus, implementing changes in these two areas alone took roughly five years, and culminated in 2017, with the resignation of one of the founding board members of TMF.

I think that before addressing the power struggle that we encountered within the BOD in the course of implementing change, I will briefly review the process of amending TMF’s By-

Laws and restructuring the BOD. In the following section, I will consider and succinctly discuss where and how the power struggle occurred, what transpired, and how we addressed and resolved the conflict.

Beginning in 2012, I knew that TMF needed to revise its by-laws, and at the March 2012 board meeting, we began a four-year discussion about how to go about amending TMF's By-Laws (**Artifact:** [TMF Mtg Min Mar 2012 By-Laws](#)—**Please Note:** the relevant section is highlighted). We did not amend the by-laws of TMF at that time; however, we began a season of discovery and change that would unfold over the next four years and beyond. In 2014, I wanted to address our board structure sent an email to the BOD, reviewing our steps and progress regarding this matter before our October 2014 board meeting (**Artifact:** [Email Re Oct 2014](#)). Also, I sent them a document outlining for them what needed to be considered in the process of amending the TMF By-Laws (**Artifact:** [Process of Amending TMF By-Laws](#)).

In our board meeting (**Artifact:** [Agenda Oct 2014](#) and **Verification:** [2014 Oct Minutes](#)), we discussed and appointed an ad-hoc (governance) committee, comprised of the CFO/treasurer, secretary, and an at large board member to review and make recommendations to the BOD regarding the amendment of TMF's By-Laws.

At our March 2015 board meeting, the ad-hoc committee submitted its findings and recommendations to the BOD for consideration. After discussing proposed measures, the board adopted the ad-hoc committee's recommendation and kept the BOD at seven members. There were still the three legally required executives, plus four board members. Second, the BOD adopted the proposed role/function structure for the BOD developed by the ad hoc committee on governance. Third, the BOD nominated and elected three new board members to serve on the board. Based on the newly adopted structure of the BOD, in **Table 1**, each board member now

had a defined area of oversight and responsibilities (**Verifications:** [2015 Mar Minutes](#) and [TMF News Mar 2015](#)).

Role	Area of Oversight
President	Organization
Treasurer	Finances
Secretary	Record Keeping
Director of Communications	Website and Social Media
Director of Community	Interactions with Public (including education, events, etc.)
Director of Development	Fundraising
Director of Operations	Logistics and Coordination of Team Leaders

Table 1: Board Structure and Duties of TMF

Over the next year, each board member considered and determined their functions and roles within the new structure of the BOD. By February 2016, each board member had completed their job descriptions defining their roles and function on the BOD of TMF (**Verifications:** [Director of Communications](#), [Director of Community](#), [Director of Development](#), [Director of Operations](#), [Secretary](#), [Treasurer](#), and [President](#)).

I asked Kevin Little, TMF Treasurer, to evaluate how I handled the process of change that I led TMF to undertake. Kevin wrote,

You do a great job of casting vision and helping us look forward, even beyond what we may be thinking we could potentially face. And yet you don't look too far forward to where we can no longer operate in the present. You make us aware of not just potential legal hurdles in the USA but since we are an international organization you are also mindful of how our decisions could potentially impact our work in Poland (**Evaluation:** [Evaluation Request Kevin](#)).

A Power Struggle in TMF

In October 2015, the BOD elected a new member to what we have been calling the “advisory board” (**Artifact:** [October 2015 Board Meeting Minutes Redacted](#)). In reality, what we call an advisory board is, in fact, comprised of people who volunteer for TMF as “operational staff.” Technically, an advisory board in theory is a board of advisors with whom NPOs consult seeking consul and advice. The board of advisors typically have no function in the operations of NPOs like TMF. By adding this new person to the operational staff at first appeared to be a good move, for us, because this person was already assisting TMF’s treasurer manage financial administration and produce financial statements.

Nonetheless, adding this new person to the operational staff ultimately led to an unforeseen outcome that had a debilitating affect upon the development of TMF’s financial process, policies, and procedures. The relevant issue of importance in making this minor change was that this new “advisory board member” was the office manager of a business that one of TMF’s board members owned. Initially, I did not recognize the conflict of interest, and I think that other than me, no other board members viewed it as one either. However, at the very least this small faction withing the BOD would become later the instigators of a power struggle that openly began in February 2016. It was then that I recognized and confronted it.

This small faction had been developing its own views and agendas regarding the structure and operations of TMF. Fundamentally, these two individuals saw themselves as the administrative heart of TMF providing administrative support for the operations of the TMF. I cannot and do not judge the intentions of these two individuals; however, I do judge their actions, which centered primarily upon challenging “structure” (whatever that meant to them),

and financial administration, i.e., control of accounting, financial reporting, and budget development.

Resolving Conflict and Implementing Change

Cooper (2006) points out that “our values are constantly guiding our behavior” (p. 26). He advises us to make “healthy judgments” about situations and the people involved (p. 27). Such healthy judgments included evaluating “evidence carefully,” being “unafraid to decide,” recognizing “its own limitations,” being “willing to change its mind,” refusing “to distrust another’s motives unless” there is clear evidence otherwise, holding “its convictions with charity and tolerance for others,” separating “behavior and ideas from people, who hold them,” and having “concern for others” (pp. 27-28).

When considering this conflict between the BOD and this faction within the BOD, it was apparent that we were operating out of a different set values. I realized that, as I was trying to weigh the evidence carefully, the conflict had spiraled out of control. An argument erupted through a series of emails that put me at odds with the board member. I realized that I had to apologize and attempt to make peace with the board member with whom I was now in conflict. I did so at the 2016 spring board meeting (**Verification:** [2016 Mar TMF Board Meeting Minutes Redacted](#)). Things seemed to normalize and move forward well as we prepared for our summer Jewish cemetery restoration projects in Poland.

However, the dysfunction of our financial process and policies came to a head that summer in the midst of conducting our Jewish cemetery restoration projects. TMF was partnering with a descendant’s group in which, for the first time, TMF was collectively handling the money for 30 people as the single-payer. The budgeting process went smoothly as far as working out costs, how to cover the costs, and with what funds. The problem arose in

bookkeeping and accounting for these costs administratively in the States versus matching up and reconciling the receipts on the field.

For several years, I had been asking for a bookkeeping mechanism to match receipts with line-item budget categories for projects on the field. The board-approved manner to that point been me making a photograph of a receipt and submitting it to a cloud for the aforementioned office manger/bookkeeper to reconcile in their private office's version of QuickBooks. This approach seemed to function well up until that project in 2016; however, it did produce friction occasionally between several board members and this individual. Regardless, in 2016, the field team had a huge problem, and had no idea how to reconcile a large number of receipts with the project budget. The field team was enormously upset and frustrated to the point of tears.

I knew it was time to confront the issue and resolve the conflict for the betterment of the organization. Therefore, I recommended that the field team, led by Rachel McRae, make a recommendation to the BOD that TMF should change its method of bookkeeping and financial reporting, so that it might determine how best to reconcile field receipts against a project budget (**Artifact:** [TMF Recommendation QuickBooks](#)). Ultimately, our dilemma on the field led to a significant change in the organization. The BOD voted to purchase QuickBooks and take responsibility for administering its finances and doing its own bookkeeping. This decision did not sit well with the board member and the office manager faction with whom we had been in conflict.

Summarizing what transpired, the board member of the small faction responded by accusing the BOD of TMF of causing discord in their office's staff to the point that they wanted to quit their jobs. Essentially, the BOD pointed out to this board member that TMF was not

responsible for the discord in their office staff—the board member was, since it was their business.

Following this confrontation, we began to operate our board meetings differently by taking two formal steps. First, in our 2016 fall board meeting, we elected a chairperson of the board to oversee and direct board meetings, and second, we introduced Robert’s Rule of Order into our meetings (**Artifact:** [2016 Oct Meeting Minutes](#)). By implementing these changes, our board meetings were focused and productive. However, by this point, both the board member and the advisory board member with whom we had conflict did not attend this board meeting and by the next board meeting in the spring of 2017, they both resigned and we elected a new board member to replace them, who took on the role and function of Director of Operations Poland. (**Verification:** [2017 Oct TMF Board Meeting Minutes Redacted](#)—**Please Note:** The names of the involved parties who resigned are redacted. The relevant portion concerning the nomination and selection of a new board member is highlighted).

Finally, I asked, JoAnn Siegienski, TMF Secretary, executive board member and board chair, to evaluate how I handled the conflict regarding this situation (**Evaluation:** [Steven and Conflict with Board Member Redacted](#)). She outlined the issues and delineated how we responded to the conflict. I will quote some of her evaluation of the situation and my actions below:

Steven discussed the situation and helped determine what the actual issues were vs the results we were seeing and then helped separate the issues from the person.

Issues:

1. Inability to separate personal office situation from TMF situation
2. TMF Agenda being side-tracked

Our plan of action:

1. As I [JoAnn] had previously had interaction with [the board member in question] regarding [their] office situation, [Steven and I] agreed that I would send a letter separating organization issues from the issues with [their] office, articulating that we (TMF) understood that [they] had to put the interests of [their] office first.
2. To prevent our agenda's from being side-tracked, Steven had us incorporate Robert's Rules of [Order] to conduct our [board] meetings.
3. He also had us clearly document decisions made so that we would all be on the same page going forward.

Outcomes:

1. [The board member] chose not to engage in follow up discussion regarding the situation with [their] office and TMF.
2. We were able to keep to our agendas and TMF was able to move forward as an organization.
3. [The board member] decided to remove [themselves] from the TMF board and has maintained a relationship with the organization.

Finally, I asked JoAnn, "How would you evaluate my leadership as I led us through these changes? What do you think?" She responded,

I think your leadership was good. You set the standard for how we deal with conflict resolution as an organization. The fact that you were able to do that in a rational and biblical manner, in spite of being personally attacked, is to me the sign of a true leader (**Evaluation: Re: Evaluation Request JoAnn Redacted**).

In retrospect, this power struggle and the ensuing conflict it produced was one of the most difficult periods in my life as a leader and a person. Leading change requires courage and a willingness to confront conflict, navigate issues, and develop a way forward—all without injuring individuals or destroying the organization. Leading change is a balancing act akin to performing in a high-wire act. One misstep and things can collapse around us and come crashing down. We have certainly passed through several refining fires; however, to this point in our journey, we have indeed stumbled and struggled. Nonetheless, we have not fallen and given up hope. I have led our board to become a skilled group of leaders who are dedicated to the mission

of TMF. They allow me to lead, while at the same time they have learned to provide the administrative support necessary for us to lead and manage TMF effectively.

Summary

Glassey asserts that “to effectively introduce the change, it may require a few members of the board to leave” (p. 7). For TMF, Glassey’s statement is true. TMF has seen four of its founding board members leave the organization. Obviously, the lack of clear responsibilities and functions needed to change, which we addressed by amending TMF’s By-Laws and restructuring its board. Schein (1985) theorizes that “all change . . . is motivated;” nonetheless, not all changes occur or progress in the manner that the change agents wish for them to proceed (p. 300). His statement implies that “much of what actually happens as a consequence of initial change efforts may be unplanned and unintended” (pp. 300-301). Schein (1985) reasons that such unexpected outcomes are due to a change agent miscalculating “the effects of their actions or may be unaware of other forces” acting at the same time (p. 301).

Leading and implementing change produces “unplanned and unintended” outcomes of which some are devastatingly tragic, such as our experience with this power struggle, while other outcomes are quite fulfilling and indeed wonderful, as illustrated by the restructure BOD. TMF is not yet everything that it could be. We still have improvements to make and changes to address and implement as we continue to grow and develop our organization in pursuit of its mission. Still, at this point, we can celebrate our success *not* because we won a battle and conquered a foe, but because, we have learned to overcome adversity and persevered. Thus, we have matured and become more than we were at the beginning as a group of neophytes embarking on a perilous journey. We have become a board who shares common values and a unique vision of pursuing dialogue with the Jewish people of Polish origins through our mission of restoration.

CHAPTER 3

KEY LEARNINGS AND SERVING OTHERS

Implementing Change

Schein (1985) asserts that “organizational cultures are created by leaders;” furthermore, he considers that “one of the most decisive functions of leadership” could be “the creation, the management, and destruction of culture” (p. 2). Likewise, Schein (1985) considers that “organizations are not easy to define in time and space,” and they are, he reasons, “open systems in constant interaction with their many environments,” consisting of numerous “subgroups, occupational units, hierarchical layers, and geographically dispersed segments” (p. 7). Furthermore, he considers culture to be “a pattern of basic assumptions—invented, discovered, or developed by a given group as it learns to cope with its problems of external adaptation and internal integration” (p. 9).

Glassey (2003) affirms that boards change “because *they* believe that the mission of the organization deserves the best board possible” (p. 7). Likewise, Pynes (2013) asserts that the members of the board of a NPO “must believe in the mission and purpose of the organization and want to work on its behalf” (p. 395). Implementing the mission and vision required all of us on the BOD of TMF, to learn about our mission and who we were as leaders.

TMF Value Development

Organizationally, our ethical values and behavior are the basis for how we do what we do. As TMF, we serve the Jewish community of Polish descent by facilitating the mitzvah of caring for Jewish cemeteries in Poland. The Polish-Jewish community is small numbering between 10,000 and 20,000 people, and as a result, it is not able to care for the 1,200 Jewish cemeteries scattered across Poland.

We do our work with humility and integrity, but we also understand the sensitive nature of working with Jews who are suspicious of our motives. Christians, by and large, seek to “evangelize or what some call “proselytize.” I have shared articles about proselytism with the board of directors of TMF, and we have discussed the concept extensively. We do not proselytize. Instead, we seek to open a dialogue with the Jewish community as Christians towards reconciliation. We honor the Jews as the root of everything that we know about God, and we do what we do out of love for our neighbors.

One of the practical outflows of my coursework in LEAD-645 was to explore the values held by TMF board members. Before our March 2013 board meeting, I sent an email in which I asked to board and our primary volunteers to consider their values (**Artifact:** [Email 2013 March TMF Board Meeting](#)). I asked three questions to guide their consideration:

1. Write down the five most important things (what you value most) in your life?
2. What personal values do you bring to The Matzevah Foundation?
3. What core values do you expect The Matzevah Foundation to possess?

In our board meeting, we discussed ethics and values and how as TMF we must maintain ethical standards, one of which is abstaining from proselytism (**Artifact:** [2013 March Agenda for TMF Board Meeting](#)). We also considered the value statements among the TMF group and

tabulated and discussed the values held by the group (**Verifications:** [2013 March Minutes for TMF Board Meeting](#), and [TMF Member Value Statements](#)).

As the founder of the work of caring for and restoring Jewish cemeteries in Poland, I have worked to change and shape the culture and thinking of volunteers, who have participated in the work of caring for and restoring Jewish cemeteries in Poland. I have introduced the concepts of Micah 6:8, Matthew 23:23, and the notion of “Weeds, Deeds, and Seeds,” to volunteer groups since 2006. In Addition, I have produced several volunteer orientation guides and trained volunteers at every turn about the importance of influence what we were doing as Christians serving Jews by caring for the neglected Jewish cemeteries of Poland (**Artifacts:** [Competency 2b: Mentor/Coach](#)—See: “Weeds, Deeds, and Seeds,” [Project Nehemiah](#), and [Orientation and Culture May 2019](#)).

Based on what I have learned, I began to incorporate what “has worked well enough” for TMF to consider as its core values in its establishment, and therefore, they should be considered as valid and “be taught to new members [of the organization] as the correct way to perceive, think, and feel in relation” to the work (Schein, 1985, p. 9) of TMF. One of our board members, Elaine, shared with me one time via email a few words of encouragement. She wrote, “While I was looking at some sections of the TMF Website

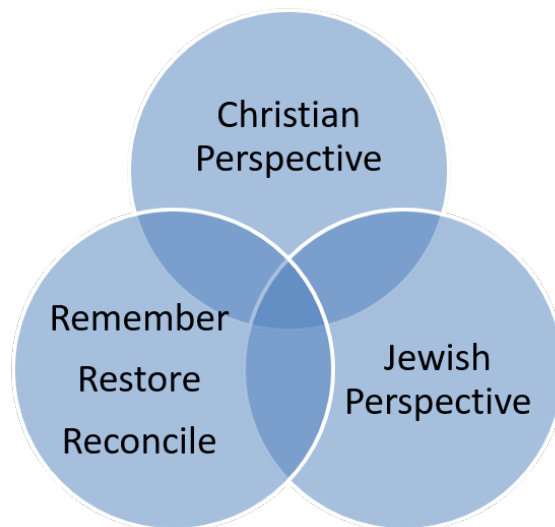


Figure 1: Intersection of TMF, Christian, and Jewish Values

this morning, I was seeing your huge smile and remembering all the ways you inspire and educate us.” I do work constantly to train and teach our board and its volunteers.

Nonetheless, from time-to-time, I address the drift in values, or I introduce training into our meetings, and projects. For example, in the October 2014 board meeting, I led a session in cross-cultural training (**Verification:** [2014 Oct Minutes](#)—**Please Note:** the relevant section is highlighted). In this session, we considered a cross-cultural encounter between one of our board members and a Jewish man from the Rabbinical Council with whom we have been working since 2006. Related to Figure 1, above, we discussed,

1. Discussed the need to understand, from a Jewish perspective, the import[ance] of what we’re doing [as an organization].
2. Discussed cross cultural training and what our objective is.
3. If we’re after dialogue, how do we get there?

Likewise, we discussed the question: Where do they [our values] meet? Finally, we discussed two conceptual frameworks, which I do not have time to consider further here; nonetheless, I shared research that I had encountered concerning *Dabru Emet* (Speaking Truth) and Courageous Conversations of Race.

TMF Strengths Finder Exercise

I wanted to apply my learnings from the Strengths Finder Assessment to assist us develop as an organization. One of the first things that we did collectively was to determine what strengths we had in our midst and how to best employ them. To this end we planned an exercise in which we assessed our strengths, and we planned an exercise in which we assessed our strengths and also did a DISC Assessment—which I will not discuss (**Artifact:** [DISC](#)).

In an email, I sent out our agenda for our board meeting (**Artifact:** [Agenda Mar 2012](#)). In my email, I wrote about how “we have been increasingly and methodically developing and shaping what we are doing. Now we are to the point of defining tasks and functions.” I also wrote that our secretary, JoAnn Siegienski would organize and lead this discussion “in order for us to see how we are gifted in order to help us begin developing roles and functions on the team.” I also wrote that “this exercise will help us know and understand our personalities and strengths as a means to enable us to work more effectively together as a team” (**Artifact:** [Email Agenda Mar 2012](#)).

JoAnn, the secretary of TMF, sent an email outlining what we were to do in the online assessments (**Artifact:** [TMF Action Required](#)). To assist JoAnn, I sent her what I had from my orientation to the Leadership Program at Andrews for the Strength Finders Assessment (**Artifact:** [Strengths Finder Resource](#)). From these resources, JoAnn prepared an extensive and detailed summary of our strengths embedded within the people of TMF (**Verifications:** [StrengthsFinder Team Summary](#) and [TMF Strengths Chart](#)). I will not discuss our findings as it would be beyond the scope of this paper. Regardless from these findings, we learned, who we are and our strengths as an organization. With this data, we began a two-year journey of shaping and restructuring TMF. Subsequently, when we met for board meetings, we asked ourselves questions regarding the purpose of TMF. What are we trying to do and how are we going to get there? What is each person’s function within TMF and how is it related to the work in which we were all engaged?

Media and Communications

In order to illustrate how the restructuring of the BOD of TMF functioned in its application, I will share the role and function of the Director of Communications. Rachel McRae

is the Director of Communications and oversees TMF's website and social media platforms. She produces and provides the content to these platforms via updates and blog posts. I provide content in the form of written stories, photographs, and occasional videos. Rachel has the lions' share of responsibility for managing the TMF Facebook page, Twitter and Instagram accounts, and she produces a newsletter. Rachel writes the majority of our posts for Facebook, Twitter, and Instagram. I provide content in her absence and I rarely post to our FB page.

Rachel began leading our communications development well before we established the position of Director of Communications in 2015. For example, Rachel began producing newsletters, writing copy for TMF's Facebook page, and began leading us in the development of TMF's first website. The original TMF website, unfortunately, no longer exists and has been replaced in 2019; however, I have a few artifacts that demonstrate our process of designing, building, and launching TMF's first website.

Beginning in September 2014, Rachel developed the navigation and page structure and along with her, me and one other board member, John Mark Folker, began to develop the page structure for the website using a template (**Artifact:** [TMF Website Content Nov 2014](#)). We did not have funds to hire a web designer, so we did all the work ourselves. We employed our own resources and abilities to design, structure, build, and populate TMF's first website with content. By the end of January 2015, we completed our work and launched TMF's first website (**Verifications:** [Fwd Re New TMF Website Has Launched](#) and [The Matzevah Foundation Newsletter, April 2015](#)).

Before and launching TMF's website, we requested feedback from various people who were associated with our work. I will discuss the importance of feedback in the next section. However, within two years, Rachel sought additional feedback from a professional graphic

designer (**Evaluation:** [RE TMF Website Pro Feedback](#)) and determined that TMF needed to revise its original website with a new look and fresh content. Once more Rachel led us to revise and rebuild TMF's next website (**Artifacts:** [Nonprofit Websites](#), [Website Gathering Data](#), and [2017 Oct TMF Board Meeting Minutes](#)).

It took about 18 months for Rachel in cooperation with John Mark to complete the revision process for the next website. I had very little involvement with the process, other than producing some content, providing photographs, and editing text. In early June 2019, Rachel sought feedback from the board of directors (**Verification:** [Re New Website Launched](#)). After reviewing the feedback and making corrections, we launched [TMF's new website](#) on June 27, 2019 (**Verification:** [Announcing the new website for The Matzevah Foundation](#)).

Serving Others and Changing the Future

Developing the Cultural Stewardship Model

In my reflection paper, I did not discuss the research that I conducted for my dissertation; however, it is relevant to consider moving forward as it relates to implementing change within the broader circles of Polish-Jewish descendants in which TMF operates. One recommendation that I made to the BOD was that of exploring and developing the so-called cultural stewardship model of linking Jewish descendants with local Polish communities in the long-term care and restoration of Jewish cemeteries. By so doing, TMF may facilitate not only the long-term care of cemeteries, but it may also develop communities of memory that will facilitate the restoration of relationships, dialogue, healing, and reconciliation.

Recently, a rabbi with whom we collaborate, defined for me what our role is within the framework of Jewish cemetery restoration. His definition is pivotal for me to consider as TMF

develops its cultural stewardship model. TMF functions as *Shaliach* or *saliah* which is a Hebrew term that “is not found in the [Tanakh or Old Testament] and came to prominence in the rabbinic period” (Agnew, 1986, p. 80). It designates one who is “trusted with the authority of [their] employer when taking messages” (Browning, 2009, p. xxxix). Consequently, *shaliach/saliah* embraces the concept of serving as an emissary (Aharonov, 2015, p. 190) and the term has embedded within it the “technical implication to describe a commissioned agent, one sent to act in the name of another” (Agnew, 1986, p. 80). Even though such emissaries, “usually had a specific goal in their missions . . . they also served as a direct and living link” connecting the one who sent them and the community to where they were sent (Aharonov, 2015, p. 190).

This latter consideration is significant as defines and explains the linking and connecting role that I and TMF play in the continuum of Jewish and Christian relations in Poland and beyond. To illustrate what my role and the role of TMF and its volunteers play, I will share a newsletter from Alon Goldman and the World Society of Czestochowa Jews (**Artifact:** [The Jewish Cemetery Cleaning Project in Czestochowa June 2020 is underway](#)). We have been working with Alon since 2016 to oversee the works in the renovation of the Czestochowa Jewish cemetery. We began the project in June of 2018 so that we could involve the local schools in the project. In his newsletter, Alon thanks TMF for their involvement in last year’s four-day project:

Thank you very much my dear friend from The Matzevah Foundation, the chairman, Pastor Steven D. Reece, Poland Operations Manager Przemek Panasiuk, without whom we could not have been executed and managed the project, thank you also to your volunteers of Rachael Romero from Miami and Yolanda Czyzewski-Bragues from Hamilton, Ontario, I am sure that you too will take these moments in the Czestochowa Cemetery in your hearts.

Collectively, as TMF, and for Alon, we are fulfilling the role of *Shaliach*. Thus, we are linking the global Jewish community, whose roots are in Czestochowa with local Polish Christians, American Jews, and Christians as a representative of the Chief Rabbi of Poland and

the Jewish community of Poland as their representatives to oversee the work (**Verification:** [Steven Reece Authorization Letter in Polish](#)). The BOD and I think that TMF is pursuing a model that may change the reality concerning the long-term care and preservation of Jewish heritage of Poland in the form of these Jewish cemeteries.

Jewish Cemetery Consultation

Increasingly, I am contacted by Jewish descendants regarding whether or not TMF can assist them in a Jewish cemetery restoration project by adopting their project or consulting with them about how to go about initiating and conducting a Jewish cemetery restoration project in Poland. What this situation indicates to me is that externally, among the Jewish diaspora of Polish descent, TMF is being recognized as a leader in the field of Jewish cemetery restoration projects in Poland. Consequently, I am being sought out by these descendants regarding the care and restoration of Jewish cemeteries in Poland. For example, since 2016, I have been consulting with Dr. Bill Brostoff and his family about restoring their ancestral Jewish cemetery in Trzciannie, Poland (**Artifact:** [RE: Matzevah Foundation project selection](#)).

In my response to Dr. Brostoff, I answered his questions and laid out for an overall process to consider in conducting a Jewish cemetery restoration project. Kevin Little, TMF Treasurer, shared with me his feedback regarding how I handle Dr. Brostoff's inquiry:

I continue to be amazed at how you've grown as our president. The email outline below is well versed and understandable with a very personal touch – not cold and robotic. Thank you for continuing to follow the Lord in leading our organization. It is a true joy to serve with you (**Evaluation:** [Kevin RE: Matzevah Foundation project selection](#)).

Since I am contacted more and more frequently last year we modified how we handled Jewish cemetery project inquiries and moved them to our website (**Artifact:** [Jewish Cemetery Project Inquiries](#)).

About three years after this email exchange, Dr. Brostoff contacted once more; however, this time he wanted to invite me to participate in the 2020 International Association of Jewish Genealogical Society (IAJGS) Conference which I will discuss in the next section. What is relevant at this point is what he stated about me and my work. He wrote in his email,

I wanted to thank you for all the work you are doing in Poland. Even though you aren't directly participating in my particular project, the Trzcianne Jewish cemetery, all of your work elsewhere does provide invaluable indirect help (**Artifact:** [Re Trzcianne cemetery](#)).

Even though I have never met Dr. Brostoff face-to-face, I see my relationship with him as an outgrowth of the influence that I have developed as a means to change the landscape in the relationship between Jews and Christians. Bill's inquiries and his invitation to me are an outflow of my work with other Jewish descendants that I am mentoring—much like the Barnabas mentoring model of II Timothy 2:2 (**Artifact:** [Competency 2b: Mentor/Coach](#)).

Finally, Dr. Brostoff has authored a guidebook which he wrote to assist other Jewish descendants navigate the complex terrain of Jewish cemetery restoration project in Poland (**Verification:** [Guidebook for Jewish Cemetery Restoration](#)). His guidebook is by no means comprehensive, but he provides enough structure and detail regarding his experience and what he has learned in his journey. He considers TMF to be one of the “important players” in the field of Jewish cemetery restoration in Poland. About TMF he stated,

The Matzevah Foundation (TMF): TMF is a U.S. based, volunteer, non-profit organization. Their primary mission is to mobilize volunteers to restore Jewish cemeteries and seek to reconcile Jews and Christians. Each year, they are involved with several cemetery restoration projects in Poland. Sites for restoration are selected competitively by a board; thus they are not a “for hire” service, but rather develop and focus on projects that engage descendants, volunteers, and the local Polish community (Brostoff, 2020, p. 11).

Dr. Brostoff's words are an affirmation to me regarding how far TMF has come in the last ten years. I began caring for and restoring Jewish cemeteries nearly 16 years ago. Although, there are there are Poles who have been doing this much longer than me, I am probably one of

the only ones attempting to link Polish-Jewish descendants to local communities in their ancestral homes in Poland. Brostoff (2020) posits,

As little as a decade ago, Jewish cemetery restoration in Poland was uncharted territory. With the dedicated individuals and teams, particularly FODŹ and The Matzevah Foundation, and their respective funders; tremendous progress has been made toward making the process more routine, thus producing a critical mass of experience (Brostoff, 2020, p. 13).

I agree with Dr. Brostoff. We are at the point of critical mass and TMF has been a part of leading this shift. Thus, in order to impact the future, we must change the present and engage Jews and Christians working together to care for and restore Jewish cemeteries in Poland as a pathway for dialogue and reconciliation.

IAJGS Conference

Two years ago, I was invited to serve as a panelist for the topic of “Saving Jewish Cemeteries in Poland” at the 2018 International Association of Jewish Genealogical Society (IAJGS) Conference held in Warsaw, Poland. Because of that experience, I have made connections with various people and have begun to have an influence within the Jewish diaspora of Polish heritage. Late last year, Dr. Brostoff, invited me to participate once more on a panel discussion at the International Association of the Jewish Genealogical Society (IAJGS) Conference to be held in San Diego, CA this August.

In his email, Dr. Brostoff stated, “I suspect you have more experience working with and organizing descendants than anyone else.” He also shared with me his idea about the panel discussion and his proposal (**Artifact:** [Re Trzcianne cemetery](#)),

I am proposing a Panel on Jewish Cemetery Restoration at the IAJGS meeting in August 2020 which will, as you likely know, take place in San Diego. The panel would be similar to the one in Warsaw last year but focus on the role of descendants and determine the extent that they would like to somehow organize to provide feedback to the authorities in Poland and share lessons learned. An additional focus would be how this group could address the larger group of cemeteries in addition to their own ancestral cemetery.

The board and I see Dr. Brostoff's invitation as a pivotal moment for TMF in that once more we are being invited to speak about our work in Poland, and we have the opportunity influence a large international regarding the long-term preservation of Jewish cemeteries in Poland. This opportunity is a priority for us even more so in light of the ongoing Covid-19 Pandemic. We are not certain if the conference will be canceled or not; however, we have already determined that if must modify our scheduled projects in Poland, the IAJGS Conference is our priority (**Verification:** [Coronavirus Special Meeting - March 22, 2020](#)).

Conclusion

Schein offered several insights that assisted me to navigate the issues concerning and understanding the process of change. Schein (1985) theorizes that “all change . . . is motivated;” nonetheless, not all changes occur or progress in the manner that the change agents wish for them to proceed (p. 300). I find Schein's statement to be true—change is difficult to predict. Schein reasons that “much of what actually happens as a consequence of initial change efforts may be unplanned and unintended” (pp. 300-301).

TMF is nearly ten years old. At the beginning, all of us on the BOD were raw and inexperienced when it came to organizing and operating a NPO. Regardless, NPO's are businesses that need structured boards, a dedicated staff, and well defined processes, policies, and procedures. TMF had none of these attributes at its inception, and needed to develop these attributes from the ground up. I addressed these needs initially by amending the by-laws of TMF and restructuring the board. I attempted to manage change relying principally on Kotter's and Jian's approaches to change. Both were helpful theoretically, but practically, I had to improvise and deal with the reality of the situations, as they unfolded.

Early on in leading change in TMF, I miscalculated “the effects of [my] actions;” I was certainly “unaware of other forces” acting at the same time (Schein, 1985, p. 301). I assumed buy in and loyalty of the original BOD to the vision and mission of TMF. Making these two fundamental changes took four years to realize, and the process was fraught with difficulties, struggles, and conflict. Within three years of its founding, three of TMF’s founding board members resigned. Leading and implementing change does produce unexpected outcomes of which some are devastatingly tragic, such as my encounter with a power struggle within the BOD of TMF, while other outcomes have been quite fulfilling and indeed wonderful.

I think that God has led us through his refining fire to remove the chaff from among us. I value everyone, who serves and has served on the BOD of TMF. However, the reality is, as Glassey (2003) maintains, “to effectively introduce the change, it may require a few members of the board to leave” (p. 7). The resignations effectively pruned TMF and allowed it to develop its current organization structure, policies, and procedures. TMF is not yet everything that it could or should be. We still have improvements to make and changes to address and implement.

Nevertheless, I think that God has positioned TMF where it needs to be presently. We are to be a voice for the voiceless, and a servant, who leads and assists Polish-Jewish descendants to re-engage and re-connect with their ancestral communities in Poland, so that mutually Poles and Jews may preserve Jewish heritage and open the way for dialogue and reconciliation. TMF has become a cultural steward, a *Shaliach*, “a commissioned agent, one sent to act in the name of another” (Agnew, 1986, p. 80). Even though such emissaries, “usually had a specific goal in their missions . . . they also served as a direct and living link” connecting the one who sent them and the community to where they were sent (Aharonov, 2015, p. 190). We have become such cultural emissaries because we have passed through the fire and were found to be faithful.

Documentation of Competency

Artifacts

1. [Leadership and Management](#)
2. [TMF Vision, Mission, and JCR Projects](#)
3. [Process of Amending TMF By-Laws](#)
4. [TMF Mtg Min Mar 2012 By-Laws](#)
5. [Email Re Oct 2014](#)
6. [Agenda Oct 2014](#)
7. [October 2015 Board Meeting Minutes Redacted](#)
8. [TMF Recommendation Quickbooks](#)
9. [2016 Oct Meeting Minutes](#)
10. [Email 2013 March TMF Board Meeting](#)
11. [2013 March Agenda for TMF Board Meeting](#)
12. [Competency 2b: Mentor/Coach](#)
13. [Project Nehemiah](#)
14. [Orientation and Culture May 2019](#)
15. [DISC](#)
16. [Agenda Mar 2012](#)
17. [Email Agenda Mar 2012](#)
18. [TMF Action Required](#)
19. [Strengths Finder Resource](#)
20. [TMF Website Content Nov 2014](#)
21. [Nonprofit Websites](#)
22. [Website Gathering Data](#)
23. [2017 Oct TMF Board Meeting Minutes](#)
24. [The Jewish Cemetery Cleaning Project in Czeszochowa June 2020 is underway](#)
25. [RE: Matzevah Foundation project selection](#)
26. [Jewish Cemetery Project Inquiries](#)
27. [Re Trzcianne cemetery](#)
28. [Re Trzcianne cemetery](#)

Verifications and Evaluations

1. [2014 Oct Minutes](#)
2. [2015 Mar Minutes](#)
3. [TMF News Mar 2015](#)
4. [Director of Communications](#)
5. [Director of Community](#)
6. [Director of Development](#)
7. [Director of Operations](#)
8. [Secretary](#)
9. [Treasurer](#)
10. [President](#)
11. [Evaluation Request Kevin](#)
12. [2016 Mar TMF Board Meeting Minutes Redacted](#)
13. [2017 Oct TMF Board Meeting Minutes Redacted](#)
14. [Steven and Conflict with Board Member Redacted](#)
15. [Re: Evaluation Request JoAnn Redacted](#)
16. [2013 March Minutes for TMF Board Meeting](#)
17. [TMF Member Value Statements](#)
18. [StrengthsFinder Team Summary](#)
19. [TMF Strengths Chart](#)
20. [Fwd Re New TMF Website Has Launched](#)
21. [The Matzevah Foundation Newsletter, April 2015](#)
22. [RE TMF Website Pro Feedback](#)
23. [Re New Website Launched](#)
24. [Announcing the new website for The Matzevah Foundation](#)
25. [Steven Reece Authorization Letter in Polish](#)
26. [Kevin RE: Matzevah Foundation project selection](#)
27. [Guidebook for Jewish Cemetery Restoration](#)
28. [Coronavirus Special Meeting - March 22, 2020](#)

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