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EXECUTIVE SUMMARY

Grant Activity Summary

This cross-portfolio research study of Jewish leadership development officially began in April, 2018. In that time, we have primarily engaged in the initial data collection and learning phase. Our grant team hired a religious studies scholar to manage and implement much of the project, and engaged with senior consultants in the fields of Jewish education, Jewish leadership development, and leadership development more broadly. We have now read extensively in the field, summarizing our findings below and contextualizing them in relation to the broader field of leadership development. In addition, we attended and evaluated the August convening, have conducted 66 interviews with Jewish leaders, reviewed the portfolio of grantees, and have begun site visit work. Our proposed activities for Year 2 are aimed at completing data collection, synthesizing, and sharing our findings.

Literature Review Summary

Our literature review identified several themes about the nature of Jewish leadership and the leadership needs of the contemporary Jewish community. It is clear even from classical literature that the heritage of Jewish tradition includes a robust vision for a distinctly Jewish style of leadership. It is collaborative by design and intentional about circumscribing the authority and power of individuals in order to hold space for a plurality of views. The competencies necessary for individual Jewish leaders to be effective leaders are similar to those needed for any leadership role, however, the contemporary contexts and circumstances of Jewish communities are unique, and the most critical leadership needs at this moment are those that will enable Jewish leaders to address the challenges of the day and prepare for the future.

The literature and contemporary discourse points to five categories of challenges as most significant.



The first category is **polarity challenges**, such as the cultural shift from a community orientation that prioritizes consolidation and security to one of diversity and exploratory risk-taking. Jewish leaders will need to understand the potential value of each orientation and have the skill to manage the shifts between these polarities without allowing either orientation to become extreme.



The second category, **community challenges**, relates to developing and maintaining a communal sense of Jewishness that appreciates rather than conflicts with the reality that individual expressions of Jewish identities will continue to diversify. Navigating these challenges will require visionary leadership that inspires Jews to share concern for one or more meaningful purposes.



Education challenges are closely related to the diversification of Jewish identities. Individuals must make choices about how to allocate their limited time and attention while engaging with multiple aspects of their own personal identity. People have busy schedules, and not every Jew will necessarily prioritize engaging with Jewish aspects of their identity above their possibly multitudinous other interests and worldly concerns. To compete in this busy social context, Jewish education must appeal to the needs and priorities of individual learners. By integrating Jewish learning with learning and activities that are simultaneously relevant to other aspects of the learner's identity, Jewish education can be the more appealing choice by providing a greater benefit and return on the learner's investment of time. Since this will require Jewish education to take on a number of novel

approaches and forms, Jewish communities will need to reconsider what the field of Jewish education looks like and entails to include a far greater range of program types and activities.



The **professional challenges** confronting Jewish leaders today are similar to those facing other organizations in the social sector. These include attracting and retaining top talent and preparing Jewish professionals with the skills and resources needed to succeed and advance into new or newly-vacated executive positions or other leadership roles. Meeting this challenge will require building powerful professional development and leadership development opportunities into every facet of Jewish organizational work, and possibly field-wide collaboration to provide shared resources for mentorship and coaching. On a more basic level, a critical skillset to be developed is familiarity and facility in navigating the nonprofit sector, and particularly how to achieve excellence in nonprofit governance as well as organizational operations and management.



All of the above are also critical **network challenges** because meeting these challenges is beyond what can be expected of any single organization. It will be imperative to develop new network-oriented systems and practices that facilitate field-wide collaboration. Not only is this in alignment with the Jewish model of collaborative leadership, but it is supported by the latest thinking on distributed network leadership and collective impact. The need for field-wide collaboration has long been recognized, but new approaches to network analysis and network engineering will be essential to identify strategic levers for intervention and to provide guidance for collaboration efforts.

Recommendations for Future Grant Activity

In Year 2, we propose completion of interviews in the first quarter of the grant year (by June 2020). Analysis of the interviews can then proceed throughout the summer in conjunction with network analysis work. We propose an initial network analysis based on *publicly available* data obtained through web-scraping and text analysis. This will inform the next steps of the network analysis by providing an initial scan of the field to inform network questions for further focus that will be more directly connected to the strategic efforts of the Jim Joseph Foundation. We plan to continue site visits throughout the year, in order to observe the programs at their optimal time. We also look forward to working collaboratively with the Foundation to disseminate initial results in strategic ways. Finally, we presume that the grant activities of the first half of the year will inform the nature and format of a second convening as well as opportunities for more collaborative feedback from the larger field of Jewish leaders, Jewish education leaders, and lay leaders.

LEARNING OBJECTIVES

The overarching aspiration of the Jim Joseph Foundation is the following: “Inspired by Jewish learning experiences, all Jews, their families and their friends lead connected, meaningful, purpose-filled lives and make positive contributions to their communities and the world.”¹ The concept of Jewish learning here requires clarification. There is no clear definition of what Jewish learning or Jewish education entails or of the type of people who should be thought of as Jewish educators. This important issue will be discussed in more detail below.

As part of a strategic initiative to strengthen the field of Jewish education as a whole, the Jim Joseph Foundation has identified leadership development within the field as a priority and has made it a focus for grantmaking:

While the Foundation has spent a year and a half studying the leadership field, much remains to be learned in how best to invest in leaders and leadership development. In addition to the new Leading Edge grant, the Foundation is investing \$7 million to an additional 11 organizations that submitted proposals for their leadership development initiatives following the Foundation’s recent RFP. These grants all approach leadership development through various lenses and reach various target populations, such as social justice leadership, thought leadership, early childhood leadership and education, and youth leadership.²

The 11 organizations receiving grants following this RFP are:

American Jewish World Service for the Global Justice Fellowship supporting early and mid-career rabbis.

Avodah for leadership development supporting early-career young adult social justice leaders.

Bend the Arc: A Jewish Partnership for Justice for the Selah Leadership Program supporting Jewish leaders of color to be agents for change.

Habonim Dror North America for the Bonimot Tzedek Leadership Development Program supporting teens, college students and young adults.

Jewish Council for Youth Services for the Local Board Leadership Development Program supporting young adult volunteer leaders.

Jewish Theological Seminary of America for the Leadership Commons supporting emerging leaders in early childhood education and Jewish communal institutions.

National Ramah Commission for the Kerem and Amitai Ramah Leadership programs supporting teens, college students and young adults.

Shalom Hartman Institute of North America for the Incubator for Jewish Thought Leadership supporting advanced doctoral, post-doctoral, and rabbinic students.

Spertus Institute for Jewish Learning and Leadership for the Certificate in Jewish Leadership supporting senior level Jewish education leaders.

United Jewish Appeal-Federation of New York for the Wiener Center for Leadership and Learning supporting early career professionals.

Young Judeaea for the Year Course Leadership Training Institute in Israel supporting teens in their gap year between high school and college.³

This cross-portfolio research study was commissioned as a means to better understand the challenges and opportunities for leveraging leadership development to enhance the impact of these and other organizations in the field of Jewish education.

Our research will focus on three primary questions and several secondary questions:

Primary Research Questions

What is the leadership learning journey for Jewish education leaders?

What are the leadership development best practices used by different organizations and how can leadership development for Jewish education leaders be further enhanced?

How can the field of Jewish education leverage leadership development to achieve its desired impact on the community and thrive in the future?

Secondary Questions

- How does the field of Jewish education define Jewish leadership?
- What are the associated competencies and the desired outcomes of Jewish leadership development interventions?
- What are the enduring methods, practices, and models for successful leadership development training?
- What components of the program lead to the outcomes?
- Which aspects of the programs lend themselves to scale?
- Where are the critical reflection, inflection points in the learning journey prime for programmatic intervention?
- What role does networking play for individual leaders in the field?
- What are the most useful criteria for assessing future funding requests?
- What are additional, strategic, non grant-making objectives that can further the field?
- How do we create direction, alignment, and commitment around the future of Jewish leadership development?
- What are future challenges and opportunities in leadership development more broadly and how is JJF uniquely positioned to lead through these?

First Year Interim Report Objectives

This report focuses on the literature review and provides an overview of grant activities to date. We briefly contextualize our review of grantee LOIs in relation to the key aspects uncovered in our literature review. We identify next steps for analysis and provide recommendations for subsequent grant activities.

LITERATURE REVIEW

The research questions guiding this study (presented in the table above) can be rephrased and summarized as follows:

1. How have Jewish education leaders developed through opportunities and learning experiences?
2. How can leadership be developed?
3. How can understanding the above inform strategies to achieve greater impact in the field of Jewish education?

This literature review explores the foundational themes of these complex questions by exploring the distinguishing features of Jewish leadership and highlighting the main challenges facing Jewish leaders.

Jewish Leadership

Transferability of Leadership Research Across Communities

A preliminary consideration for our research is the extent to which Jewish leadership is distinct from other approaches to leadership. Writing in 2016, Lawrence Hoffman introduces leadership as an enduring tradition, but a relatively recent topic of deliberate discussion:

Leadership has emerged as the quintessential worry of our time... still a relatively new topic, but a burgeoning one, constituting the core of... a veritable 'leadership industry.' There is as yet nothing close to a Jewish leadership industry, however; specifically 'Jewish' attention to the subject is at best episodic. But as interest in leadership mounts everywhere, increasing numbers of Jews want to know how leadership in general intersects with Judaism in particular... The need for leadership is hardly novel; it goes back as far as memory reaches. But only now are we addressing leadership – and Jewish leadership at that – with all due intentionality.⁴

While the topic can be called recent from the perspective of intellectual history, it is no longer a novelty among Jewish community professionals, some of whom have been engaging these ideas for decades.

In 2002, the Task Force on Jewish Religious Leadership (TF) at the Jewish Theological Seminary suggested that although “studies of leadership and management have been widely conducted in the larger society... the applicability and transferability of this research to the Jewish world... is dubious.”⁵ However, by 2007, Lewis observed “the widespread tendency for Jewish groups to seek advice on leadership from well-regarded experts *outside* the Jewish community while remaining unaware of the profound insights on these matters found *within* classical Jewish tradition.”⁶ The TF explained its skepticism by proposing that “while religious leadership resembles all leadership, it does present unique challenges. Moreover, those challenges are in some ways different for Jews than for Christians, and different for Conservative Judaism as opposed to Reform and Orthodoxy.”⁷ As if in rebuttal, Lewis recalls that “Maimonides... instructed his readers to ‘consider the truth regardless of the source’” but also points out a deeper irony: “classical Jewish sources... articulate perspectives that lie at the heart of today’s widely accepted best practices.”⁸ In other words, insights developed within the broader field of Leadership Studies can benefit Jewish

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leaders, and furthermore, many of the leadership practices that have become widely adopted within the business world today could easily have derived from Jewish traditions of leadership.

This report seeks to bring together information from the literature of several fields. In crafting it, we've drawn from literature addressing leadership in a variety of Jewish contexts, but also from the broader field of leadership research, studies on leadership in various religious and ethnic communities, and other sources. Furthermore, we anticipate the material gathered here describing Jewish leadership will also be applicable and beneficial to other communities. Readers are invited to interpret this report through a filter that overlooks the incidentals to glean insights that may be relevant to their own contexts.

We will proceed on the premise that research about the core competencies of leadership and best practices for developing them is generally transferrable. However, we also affirm that American Jewish educators and community sector professionals today face leadership challenges unique to their contexts. Jewish leaders should be aware of relevant forces of change, whether arising from within or from beyond the Jewish community, and be ever mindful of a leader's role of navigating those forces in order to guide their organization or community forward.

Value of Studying Jewish Leadership

In 2006, Hal Lewis observed that “much of the wisdom on leadership found in Jewish sources is largely unknown to the very women and men who work on behalf of the Jewish community... Most have become convinced that the only worthwhile insights into effective leadership derive from secular sources.”⁹ If he is correct, this trend would suggest that many of today's Jewish leaders assume leadership is a generic topic that is entirely unrelated to Jewish traditions or identity. More alarmingly, this position could be interpreted as a broader challenge to Jewish education: if one were to claim that Jewish traditions have nothing valuable to contribute to the field of leadership, then of what other fields of knowledge might the same be said? What Lewis considers especially ironic about this trend is that “ancient Jewish precepts are today being corroborated by the most rigorously researched and highly regarded findings on effective leadership from the academic and business arenas.”¹⁰ Lewis is deliberate about making the point that the latest trends in leadership research are verifying the content of Jewish traditional views toward leadership, but he also devotes attention to what we might call a uniquely

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Jewish style of leadership. Both content and style are important aspects to consider in the question of “what's ‘Jewish’ in Jewish leadership?” Lewis holds forth the promise that if Jewish leaders, including “board members, executive committees, and their professional partners are willing to contemplate the significance of this material, to debate its potential applications, and to employ its insights, along with contemporary best practices, their work as effective Jewish leaders will be enhanced materially.”¹¹

Literary Tradition of Jewish Leadership Discourse

There is a long history of literature discussing the ideals and practical values of Jewish leadership as a distinct style of leadership. Lewis identifies three features that classical Jewish texts dealing with leadership tend to have in common: a theological framework, intertextuality, and communal presence.

The first is the notion that leadership among people is best understood through the lens of the human relationship to God.¹² In some times, and for some communities, that lens was positioned in the theological frame of a Jewish religious worldview. The discourse on Jewish leadership today is similar in character even though theology may be absent or deemed optional. For a growing number of Jews, authentic Jewish perspectives are located in the Jewish people themselves, without reference to God. The range of values and perspectives that can be considered *Jewish* must therefore be inclusive of the diverse backgrounds, lived experiences, and aspirations of all Jews. Sharing those perspectives and growing through them together is what gives life to the Jewish community. This process can be seen clearly in what Lewis identifies as a second common feature of Jewish literary tradition.

As he observed, authors engaging with classical Jewish intellectual traditions seem to participate in a dynamic intertextual conversation that weaves its threads seamlessly through works authored in different eras and contexts “as if they were contemporaries.”¹³ This observation echoes what Randall Collins noted about intellectual networks; the defining conversations within any community that finds its identity through shared social and intellectual traditions can be trans-local and trans-temporal.¹⁴ In effect, it is as though the literature serves as a vehicle for a conversation in which diverse voices of the community speak and debate simultaneously, in the ever unfolding here-and-now. Textual study allows contemporary leaders to connect with and partake in that conversation “in dialogue with our collective past and future,” and thereby maintain the continuity of a living Jewish tradition.¹⁵

Lastly, Lewis observes that the authors write as though they themselves, their readers, and all Jews were always present and together to witness and endure the most pivotal of the community’s historic moments.¹⁶ This paradigm of personalized community comes from the concept of *Klal Yisrael*, “the notion that in addition to the many millions of people who are Jewish, there is an entity called the *Jewish People*. The entity has a history, a culture, a destiny, identifiable needs, and the moral authority to command our loyalty.”¹⁷ In some cases, this nuance is reflected by writing that speaks of the Jewish people with verbs conjugated for an individual actor, rather than for a group (e.g. “the Jewish people has had many great leaders,” and “the people Israel is the avant-garde of humanity”).¹⁸

See also:

The New Jewish Leaders¹⁹

Models and Meanings in the History of Jewish Leadership²⁰

More Than Managing: The Relentless Pursuit of Effective Jewish Leadership²¹

Authority, Power, and Leadership in the Jewish Polity²²

Moses and the Journey to Leadership: Timeless Lessons of Effective Management from the Bible and Today's Leaders²³

The Genesis of Leadership: What the Bible Teaches Us about Vision, Values and Leading Change²⁴

Making a Difference: A Guide to Jewish Leadership and Not-for-Profit Management²⁵

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Collaborative Leadership

The insistence that “collaborative leadership is needed in Jewish communities” is a theme that is highlighted consistently in Jewish leadership literature.²⁶ Yitz Greenberg prefaced the need for collaborative leadership by warning that those who covet leadership positions can often be driven by a vision but out of touch with the community, leading to unhealthy uses of power.²⁷ “Dictators preach the way of ideology; they say: ‘Kill this person [your brother]; he is in the way of the Revolution.’ The covenantal way teaches: ‘Let him live because he is your brother, even though he may contradict the very goals of the movement.’”²⁸ The wisdom in this contrast is celebrated in the teaching, “who is strong? The one who self-controls.”²⁹

Jewish leadership has historically been characterized by maintaining systems of communal authority and an aversion to authoritarianism. Hal Lewis locates the origins of this value in scripture: “Reflecting a model first articulated in the Torah itself, Jews throughout history built systems of communal leadership that sought to divide power, rather than allow it to coalesce in a single individual or group.”³⁰ A diffused

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power structure “guarantees that a multiplicity of perspectives are brought to the table... and prevents the rise of unilateral leaders,” but also “has its weaknesses. Clarity, unanimity, and the ability to mobilize rapidly are often the first casualties... Nonetheless, Jewish communities over time have preferred the disorganization of shared and limited power to the so-called efficiencies of dictatorial regimes.”³¹ It is worth noting that in today’s interconnected social context, distributed and collaborative leadership is not necessarily disorganized, and can be a powerful means to drive collective impact. In fact, “emerging scholarship on leadership argues that the new forms of leadership need to be based on collaboration, personal reflection, and interpersonal skills in contrast to traditional, more

authoritarian notions of leadership.”³² Lewis concludes that “individuals aspiring to greatness as *Jewish* leaders must look carefully at personal leadership styles and the structural design of their organizations to ensure a system of shared and circumscribed power.”³³ Circumscribed leadership may manifest differently for leaders in different kinds of roles, and a sector-wide systems perspective on collaborative leadership will be discussed further in the section on Network Challenges.

Leadership Challenges

The ultimate mark of effective leadership is the ability to navigate change. As Elka Abrahamson wrote, “the world changes and so do we. Effective leaders are called upon to guide others through those changes.”³⁴ Responding to change is the persistent context for discourse on the challenges to be addressed by effective Jewish leadership. As noted above, Jewish leaders taking on the challenge of guiding through change are not expected to do so alone, but rather through consultation and collaboration with others.

The Jewish Theological Seminary established a research committee in 2002 to study leadership challenges facing the Conservative movement and how to create a program that would train leaders to meet those challenges. The committee’s report situated their recommendations for developing Jewish Leadership within the context of societal changes:

As we enter the 21st century, we face not just a period of cultural change, but of dramatic social transformations as well. The breadth, depth, and rapidity of transformation challenge the nature of

community, religion, and leadership in contemporary society. For most North Americans, and the majority of Jews among them, the bonds of community, critical to establishing collective identity and personal meaning grounded in relationships, have frayed... We cannot alter the social realities that challenge us, but we can train leaders to respond effectively to them.³⁵

Marom Group similarly prefaced the results of their 2015 Lay Leadership Training Survey for Nonprofit Leaders by focusing on how changes in the nonprofit sector presented challenges for Jewish leaders: "The nonprofit sector in the United States is currently in a state of flux. Generational change, rapid technological progress, a growing need for cross-sector collaboration, and internal capacity challenges are shifting the paradigm of the sector."³⁶ And in 2016, in a chapter aptly titled *I've Never Experienced Anything Like the Times We Are In*, Marty Linsky wrote, "with the possible exception of a couple of years in those tumultuous 1960s, I've never seen anything like this. Change – and rapid change, at that – is a constant. The future is uncertain and unpredictable."³⁷ This sentiment echoes through the literature of every decade.

In 1981, Charles Silberman wrote about "...a profound change that has occurred in the position of Jews in American society in the last twenty or twenty-five years, a change that makes the environment of American Jewish life in the 1980s wholly unlike anything that any Jewish community has ever faced before." However, rather than focusing on the challenges of a changing society, Silberman considered the most significant change to be a radical opening of opportunity for Jews in America.³⁸ Whether regarded as a challenge or an opportunity, responding to change is a consistent theme grounding the literature on Jewish leadership.

Jewish denominations are experiencing and responding to many of the same social changes, but often in different ways. Understanding the attitudes of different movements and denominations toward change is important for two reasons: first, it allows Jews to understand the decisions made by Jews in other denominations in response to change and empathize with the process of making those decisions, even if they do not agree with them.³⁹ Secondly, acknowledging differences and then reflecting upon them respectfully is an important element in a boundary spanning process by means of which differences between communities can function as strengths instead of causes for division.⁴⁰

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More than 30 years ago, Charles Liebman wrote about ways in which changes associated with modernity posed challenges for Jewish communities. In particular, modern ways of living made a proliferation of new choices available to individuals, especially regarding personal identity and modes of religious affiliation, interpretation, and practice. In response to these circumstances, Orthodox Jewish communities tended to respond in one of four ways. Liebman described these four responses as neotraditionalism, adaptationism, compartmentalization, and expansionism.⁴¹ Similar attitudes toward change can be recognized in the other major denominations as well. Neotraditionalism rejects change except within the framework of halakhah, but adaptationism embraces change to the letter of the law when it is necessary to preserve the spirit of the law. Compartmentalization restricts the authority of Judaism to the personal, religious sphere of life, while expansionism requires it to be the ultimate authority governing social order.

As Jewish communities continue to change from within and confront changes in the outside world as well, Jewish leaders must consider how their vision reconciles polarities, such as the tension between tradition and change, and what the implications of that balance will be for the people and communities around them.

The subtext that gives rise to these responses is how different communities understand the nature and sources of authority as well as the value and scope of tradition as a living process connecting past, present, and future generations. For example, Benay Lappe describes the principle of *svara* (“moral intuition”) in an adaptationist mode, and laments that “it’s rarely taught, because in a time of enormous change, like now, concepts like this that make radical change possible get suppressed precisely when we need them most.”⁴² The difficulty in navigating among these modes of response to change is always oriented in how authority is approached. “There is no simple formula for maintaining the balance between tradition and change... Who decides when tradition must give way? Who decides how significant or insignificant an aspect of the tradition must be before it can be modified? Who decides what the appropriate innovation is to be?”⁴³ The characteristic identities of a community proceed from its distinctive ways of relating to these themes, and particularly from how the community feels about “the study of Torah... how these Jews understand the authority of the text, how their rabbis interpret these texts, and how the communities develop norms, boundaries, and sanctions in negotiation with their members and these texts.”⁴⁴ For example, in the Orthodox community, “the past constitutes, to varying degrees, a controlling authority, and skepticism towards change is widespread among the Haredi

Orthodox community.⁴⁵ Reform Jews, while certainly maintaining a reverence for the past, are motivated by the challenge of repairing the present – *tikkun olam* – with a view to a glorious future... in the kingdom of heaven.”⁴⁶ Conservative Jews locate themselves in the middle position between these two, arguing that adaptation and change have always been integral to the tradition itself.⁴⁷

As Jewish communities continue to change from within and confront changes in the outside world as well, Jewish leaders must consider how their vision reconciles polarities, such as the tension between tradition and change, and what the implications of that balance will be for the people and communities around them. “Leadership is a dynamic interaction between the people and the circumstances. The greatest leaders are the ones who, in their teaching and their work, marry the vision and destiny of the people with the practical solutions for the contemporary challenges.”⁴⁸ Regardless of how leaders choose to respond to change, guiding the community together through changing circumstances to a thriving future is the hallmark of a great leader.

In this section below we explore 5 key leadership challenges within the context of the Jewish community.

Navigating the complex changes of contemporary society will require Jewish leaders to face three types of challenges that relate to the changing needs and values of the community:



Polarity Challenges: Shifts in the basic circumstances, challenges, and priorities of a community.



Community Challenges: These are challenges that require soul-searching, reflection, and seeking a shared sense of purpose while also acknowledging and appreciating pluralism.



Education Challenges: Designing and developing educational content and delivery experiences for an increasingly diverse audience.

In addition to these three complex and somewhat philosophical community challenges, Jewish leaders will also need to face two types of challenges that are more grounded in the practical operations and needs of organizations in the Jewish educational and nonprofit sector:



Professional Pipeline Challenges: Sector-wide challenges faced by Jewish educational and engagement organizations as they strive for operational excellence and positive social impact.



Network Challenges: Fostering a productive ecosystem of inter-organizational relationships pertinent to the Jewish social sector.



POLARITY



COMMUNITY



EDUCATION



PIPELINE



NETWORKS

Polarity Challenges

The changing context does not indicate chaos or entropy. Rather, it can be understood as a natural and predictable shift between polarities reflecting the complementary elements of stability and change.

Polarities are not the same as opposites. Whereas *good* and *evil* are opposites, polarities are a set of two qualities that are both beneficial, yet exist in tension with one other. Managing that tension effectively can be challenging, because the most appropriate response to a specific circumstance may be an

The profound social transformations observed within the Jewish community today can be interpreted as a swing between complementary polarities.

expression that favors one or another of the pair – maintaining a simple balance is rarely possible or desirable. The unresolvable tension between the two alternatives lends itself to a predictable pattern of swinging back and forth between the two poles. A leader who is attentive to this dynamic can anticipate polarity swings and harness that energy to drive productive change.⁴⁹

It is important to differentiate between the *balance* or *moderation* and *polarity management*. While balance is about seeking to accommodate conflicting interests through a stable solution, polarity management is about intermittently shifting between alternative modes which are naturally in tension with each other. For example, the past several decades of Jewish institution building

in the United States in response to anti-Semitism and the perception that Israel was in crisis was a movement for security and centralization. However, the trend of smaller organizations or communities venturing outward from the center through startups and diverse projects is growing, even to the extent that some have expressed concern for the continued relevance of legacy institutions. Approaching this kind of tension through a polarity management framework allows a leader to affirm the value and importance of each mode independently and approach the challenge with an anticipation that the community may need to periodically shift between the two modes to meet changing needs. Leaders must also be able to recognize the potential pitfalls inherent in taking either orientation too far. A critical skill is being able to communicate to others that polarity shifts are not likely to represent a permanent change while leading the community in adapting to shifting directions at the point where the shift would be most beneficial. Recognizing polarities is also a warning against extremism, which leads to instability by radically distorting the system to always prioritize one force as inherently superior to the other, or by attempting to prevent polarity swings entirely. The profound social transformations observed within the Jewish community today can be interpreted as a swing between complementary polarities.

From Consolidation to Exploration

For example, we can consider the tension between stability and change in the more nuanced sense of a cycle that began with a period of seeking stability through consolidation and institution building:

For most of the 20th century the Jewish communal agenda in the United States was defense and survivalism. Most of the communal energy and resources was spent protecting Jewish rights at home and abroad and defending against anti-Semitism. In the second half of the century that agenda also included remembering the Holocaust and supporting the state of Israel. In many ways that defensive strategy advanced the second priority of the community – communal solidarity... It fed a narrative that suggested that Jews were at risk in the world. There is no greater glue for communal solidarity than the suggestion that it is you against the world.⁵⁰

The perception of Israel being at risk which catalyzed so much solidarity, giving, volunteerism, and a sense of urgency for the community in prior decades has not been experienced by today's young Jewish professionals to the same extent. In response to existential threats and persecution, their predecessors circled the wagons and united. In the aspirations of Zionism and mobilization against anti-Semitism, they found a great unity of purpose that was able to galvanize a generation of outstanding leaders to develop strong institutions that would provide security and social support to the community.⁵¹

Especially in light of their tremendous efforts, more senior leaders may find the contemporary movement away from uncomplicated Jewish identity, the seeming erosion of solidarity and the turn from traditional institutions to be disorienting and disturbing. However, while a unified focus was needed to thrive in the face of crisis and existential threat to the community, thriving in today's environment of rapid social change and new possibilities will require adaptability, versatility, and innovation. Emerging leaders, raised in a world that felt more secure precisely because of the accomplishments of their predecessors, are now eager to look outward and explore uncharted territory. This polarity shift from consolidation to exploration has not come suddenly; Silberman expressed his enthusiasm about American Jews exploring new opportunities in the early 1980s, even as he acknowledged that the rising social comfort of Jews was resulting in a corresponding decline in affiliation with traditional Jewish institutions.⁵² By 2009, a report by Reboot found that a consequence of increasing personalization in Jewish programming is that “the vast majority of Jews interviewed were unable to recognize the names of major Jewish organizations, never mind have an opinion of them.”⁵³

The fact that younger Jews are not relying as much upon traditional institutions indicates the success of those institutions in cultivating a safe environment in which Jews are empowered to explore new opportunities.

It may appear ironic or even tragic that developing institutions would directly result in the next generation turning away from those institutions in growing numbers. However, the connection between those events and trends demonstrates that the polarity model can serve as a map to aid Jewish leaders in navigating societal change. Interpreting these changes as a swing between polarities reveals an alternative interpretation. Institution-building was not done in vain. Rather, the fact that younger Jews are not relying as much upon traditional institutions indicates the success of those institutions in cultivating a safe environment in which Jews are empowered to explore new opportunities. So while it may be true that “mobility has also meant the disappearance of neighborhood in the old urban *shtetl* sense, except in a few Orthodox communities,” the reverse is equally true: venturing out from the neighborhoods is an expression of increased Jewish empowerment and opportunity.⁵⁴ The diversity of expressions that result from increased Jewish mobility can be thought of as a polarity shift between the complementary communal orientations of unity and pluralism.

From a Focus on Unity to a Focus on Pluralism

In 1948, on the heels of the Holocaust, Simon Rawidowicz wrote a tongue-in-cheek essay on the consistency with which Jews have feared for the continuity of the Jewish people. "But if we are the last," he wrote, "let us be the last as our fathers and forefathers were. Let us prepare the ground for the last Jews who will come after us, and for the last Jews who will rise after them, and so on until the end of days."⁵⁵ Hidden beneath his satirical tone was the deeper message that "a people dying for thousands of years means a living people. Our incessant dying means uninterrupted living, rising, standing up, beginning anew."⁵⁶ Historian Jonathan Sarna echoed this sentiment, observing that "...repeatedly, down to our very own day, American Jews have creatively adapted their faith to their new environment. Reshaping Judaism in response to challenges from within and from without, they have time and again revitalized their faith, strengthening it, sometimes in surprising and unexpected ways..."⁵⁷ According to Sarna, American Jews have sometimes even responded to a threat to Jewish continuity "by promoting radical discontinuity. Casting aside old paradigms, they transformed their faith, reinventing American Judaism in an attempt to make it more appealing, more meaningful, more sensitive to the concerns of the day."⁵⁸

Benay Lappe begins to make the same point with an anecdote in which the sociologist who authored the 1990 Jewish Population Survey concludes: "There's good news and there's bad news. The good news is Judaism will exist in a hundred years. The bad news is *it will be unrecognizable to us*."⁵⁹ In Lappe's interpretation, this is cause for celebration rather than alarm. She recalls that after the destruction of the second temple in 70 CE, 90% of Jews left Judaism and assimilated into the Roman Empire, "except for one small group of queer fringy radical outsider hippie guys... – Oh by the way, we call them rabbis

A polarity-minded interpretation invites us to consider whether a swing away from unity and toward exploring a variety of new directions may already be the next big idea that will instill meaning and purpose into a new generation of American Jews.

now, right? Now they created this [new form of Rabbinic] Judaism while the temple was still standing. They were meeting in little retreat centers called synagogues while they could just as easily have gone to the temple down the block. The temple Judaism wasn't working for them."⁶⁰ In this story, the Jewish leaders who successfully carried the tradition forward to future generations were those who recognized that adaptation is a normal part of the community's continuation over time, and not a sign of entropy or a threat to survival. On the contrary, refusal to adapt and change is a threat to survival. Beyond merely surviving, the Jewish leaders of that time found a way for Jewish tradition to grow and thrive by exercising what Ron Heiftz and Marty Linsky have termed adaptive leadership.⁶¹ Judaism was preserved because a small portion of the community was willing to recognize, accept, and adapt to change, saying, "I see what you're doing. Doesn't feel very Jewish to me, but it will to my grandchildren so count me in."⁶²

The small group of Jews who pioneered the fledgling movement that would later become Rabbinic Judaism represented the beginning of a polarity shift, in this case toward pluralism which ultimately developed into a new form of Jewish tradition. It emerged from a fringe movement while the ascendant tide of stability in the community faced a crisis that saw the majority cling to the practices of Temple Judaism so strongly that losing those meant abandoning Judaism altogether. Success was achieved by skillfully managing the swing between complementary polarities to shift from a unified community

characterized by the stability of temple rituals to a pluralistic community that experimented with new practices to adapt and thrive.

A polarity-minded interpretation invites us to consider whether a swing away from unity and toward exploring a variety of new directions may already be the next big idea that will instill meaning and purpose into a new generation of American Jews. If this is true, then “finding new ways of strengthening Jewish identity and educating the next generation on the joys of Jewish living” may be the path toward – if not the realization of – “the larger goal... a renaissance in American Jewish life.”⁶³

See also:

Leading with Authenticity in Times of Transition⁶⁴

Leading Continuous Change⁶⁵

Emergent Strategy: Shaping Change, Changing Worlds⁶⁶

Leadership Without Easy Answers⁶⁷

On Leading in Times of Change⁶⁸



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Community Challenges

The success of Jewish institutions has fueled a growing sense of social comfort among Jews in America, and a shift in how the challenge to Jewish continuity is imagined. In the past, persecution often threatened the Jewish people, but in more recent times, many Jewish leaders have considered assimilation to be just as threatening to Jewish continuity. Without doubt, modernity and security have led to “dramatic changes in demography, sociology, and patterns of identity and affiliation.”⁶⁹ In 2002, the JTS Task Force on Jewish Religious Leadership charged Jewish leaders with the struggle to create and maintain a sense of religious community, calling it “the foundation of Jewish life.”⁷⁰ Jonathan Woocher warned that “American Jewish life will not flourish if Jews do not continue to regard themselves as part of a religiously and ethnically based polity.”⁷¹ Barry Rosenberg expressed concern about “reduced levels of affiliation and loyalty to traditional institutions, interfaith marriage, and growing discomfort with Israeli policies” among young people.⁷² When the Pew Research Center published their 2013 report, “A Portrait of Jewish Americans” a few months later, the data echoed those themes and sparked a great deal of discussion in Jewish communities. The Pew report detailed changing trends in thinking about the nature of Jewish identity, in social practices such as intermarriage, and in affiliation with Jewish institutions. For example, the report found that religious affiliation with Judaism among American adults had decreased by 50% since the 1950s, and the number of Jews describing themselves as having no religion had grown from 7% to 32% in the same period.⁷³ In the same year, Jonathan Woocher and Meredith Woocher summarized the shift by remarking that “American Jewry has gone from being an ‘assimilating’ community to a fully assimilated one – but without the disappearance of a distinctive Jewish identity that some predicted.”⁷⁴

Another trend with significant relevance to Jewish community identities is the growing diversity of Jewish perspectives regarding Israel.⁷⁵ The shift is most observable in the differences between generational perspectives. Younger generations of Jews “have always stood tall. Because they have never felt inferior or ashamed of their Jewishness, because they have never felt (or known) the need to be deferential to non-Jews, they have less need for the vicarious sense of potency and strength that Israel’s military exploits and its day-to-day existence provide to older Jews.”⁷⁶ Considering how intensely the Jewish leaders of the last several decades experienced the need for stability and safety, and how much effort they expended in rallying together to develop institutions of support, it is understandable that they may perceive differences of perspective regarding Israel to be a threat. To navigate sensitive topics like this, Jewish leaders will need to exercise emotional intelligence and sensitivity.

See also:

- American Jewish Identity Politics⁷⁷
- Jewish Life and American Culture⁷⁸
- The Way Into the Varieties of Jewishness⁷⁹

Complex Jewish Identities

The time for speaking of Jewish identity in the singular is over, and was perhaps never accurate anyway. Jonathan Woocher wrote that an effective approach to Jewish education must recognize that Jewish identities in the 21st century are diverse:

The neat image of a Jewish population made up overwhelmingly of white, middle-class descendants of Yiddish-speaking Eastern European Jewish immigrants from the turn of the 20th century, with a few strands of German or Sephardic Jewry mixed in, and divided into a few main denominational groupings, has been shattered. We know now that “American Jewry” includes Jews of color; descendants of Holocaust survivors; immigrants and their children from the former Soviet Union, Israel, and other parts of the world; numerous individuals neither born nor raised Jewish (whether formally converted or not); Jews of various sexual identities; and an astonishingly broad spectrum of beliefs and practices.⁸⁰

Jewish identities today are complex, plural, simultaneous, and can change according to shifts in social context.⁸¹ It is increasingly common for Jews to experience affinity with identities other than Jewish, even when they simultaneously regard Jewish identity as important. The array of choices now includes, but also far exceeds what Charles Silberman recognized when he observed, “to my children’s generation, Judaism appears to be an option, rather than a burden... they see themselves as free to choose, to choose whether or not to be Jewish.”⁸² Among Jews today, there is a growing trend to not only exercise choice in whether to be Jewish, but also to choose and prefer affiliation with multiple identities simultaneously.

This is not to say that this unbundled and remixed world is better than a bounded cultural group and tradition. For many Jews this stable reality remains the case, and I have no desire to interrupt that. Further, the trend of personalization seems to contribute to the dramatic rise in social isolation, as so little is shared to bring people together. What I do argue is that this unbundling and remixing is the reality for a growing number of Americans. And to ask them (including me) to leave behind other identities, languages and practices that hold deep meaning is both unrealistic and painful.⁸³

As Jewish identities become more diverse, it will be more and more necessary to embrace pluralism to moderate rise of religious tensions.⁸⁴ Deborah Lipstadt wrote about the danger of polarization exacerbating tensions within and among Jewish communities, warning that in the age of sound bytes, “there is less and less of a payoff for expressions of moderation. The voice that is most often heard is

the voice of extremism.”⁸⁵ In the face of this challenge, “leaders can help lower the decibel level of the discourse. First of all, they can support and praise groups and institutions which break the mold.”⁸⁶ After acknowledging that community discourse does have limits, as “not every position can be described as a legitimate *Jewish* position even if proposed by a ‘legitimate’ Jew,” she emphasizes that ultimately, “harmony, not unity, should be our objective. Unity has only existed in the minds of slogan writers and is an illusionary goal.”⁸⁷ For Jewish leaders today, accepting pluralism is “an indispensable ingredient in the building of community, even as we acknowledge our differences.”⁸⁸

*In the context of today’s
diverse communities, pluralism
is an essential attitude for
Jewish leaders.*

Yitz Greenberg relates the importance of leading in a pluralistic context, but also notes a challenge it has presented: “I make extraordinary efforts not to let disagreements be personalized. As a result, I have been able to work with a wide range of people and movements.”⁸⁹ However, “the decision to speak to the whole Jewish community forced a trade-off. Respectful discourse with others was held against me in the narrower community.”⁹⁰

Simply getting to know one another on a personal level can go a long way toward countering polarization. “Professor Daniel Elazar noted that the real denominational divide in American Jewry is between serious and non-serious Jews.”⁹¹ His distinction helps to explain the success of pluralistic programs such as Pardes and Wexner. In those programs, participants from different denominations interact over time, until “over the years, they have forged deep personal links. Their theological differences have not been obliterated, but they have learned to respect each other and to work together. This mutual respect has, in many cases, spilled over into their professional lives.”⁹² Ultimately, in the context of today’s diverse communities, pluralism is an essential attitude for Jewish leaders because “we need the participation of the widest variety of people. It is worth paying a certain price in cognitive dissonance and even in the circulation of viewpoints that may have a negative effect on our own positions, if the overall gain in attachment to the Jewish community is greater.”⁹³

Speaking of Jewish leaders in 1991, the AJC Task Force on American Jewish Leadership observed that “for many Jewish leaders, organizational involvement is a key component of their Jewishness, outweighing explicitly religious involvement.”⁹⁴ For some Jewish professionals, pursuing a career in the Jewish communal sector might be how they develop a feeling of connection to the Jewish community. For example, for someone who does not find Jewish ritual or social events compelling on their own, involvement with a Jewish organization may stand as the central pillar by which they explore and express their Jewish identity. Furthermore, the

*Leadership will entail meeting
people where they are, and
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with younger generations on
their own terms.*

American context is the first time that Jewish social life and communal institutions are primarily conducted within the structures of nonprofit organizations, making organizational involvement integral in a multitude of ways to American Jewish life. Writing on a related phenomenon in the Jewish community in 1981, Charles Silberman observed that “Jewish businessmen seem to suffer from what sociologists call status anxiety: to feel that they are *really* successful, they need the status and prestige – the identity, if you will – that comes from deep involvement in Jewish life.”⁹⁵ By contrast, younger generations of Jews develop identities in other ways, including social media and YouTube videos – “that’s where people are building their identities.”⁹⁶ Leadership in this space will entail meeting people where they are, and learning the tools to engage with younger generations on their own terms.

See also:

- Establishing Identity and Community: The Bay Area Muslim Study 2013⁹⁷
- Generation M: Young Muslims Changing the World⁹⁸
- Young Muslim America: Faith, Community, and Belonging⁹⁹
- How We Gather (etc reports)¹⁰⁰
- The Art of Gathering¹⁰¹
- The Great Good Place¹⁰² & Celebrating the Third Place¹⁰³
- Everyone Communicates, Few Connect: What the Most Effective People Do Differently¹⁰⁴

Why does one keep “Jewish” as an aspect of identity?

In her 2014 talk *Discontinuing Jewish Continuity*, Stosh Cotler discusses a stark contrast between Jewish institutional life’s public image and what Jews are seeking:

I want to say loud and clear that the reason why I believe so many younger Jews are staying away from Jewish institutional life – and I’ll throw in some older ones too – is because when they think of Jewish institutional life, they think of one thing but yearn for another. And I would contend that we are not having a crisis of Jewish continuity, but rather, we are having a profound crisis of Jewish communal purpose. So the American Jewish community is one of the most affluent, educated, integrated, and safe diaspora communities our people have ever known and at the very same moment we are at risk of losing our core identity as empathizers and prophetic actors. And this is so painful and ironic because if we were to act as empathizers and prophetic actors, we now have more power in American society that, if we leveraged that power for the common good, it would make a real difference. And so this leaves many of us feeling like we are living a contradiction. It’s very confusing, if we are not leveraging our communities’ tremendous resources for the common good, who are we? What do we stand for? What has our history taught us? And among all of the identities one can choose to be in the world right now, why choose to be Jewish in America today?¹⁰⁵

Tragically, Cotler’s comment about the safety of the American Jewish community must be tempered in light of the October, 2018 attack on the Tree of Life – Or L’Simcha Congregation in Pittsburgh in which eleven people were killed and seven more injured. This and other acts of violence or anti-Semitism stand as sober indications that safety cannot be taken for granted. Regarding Jewish identity, however, Cotler’s views the suggestion that young Jews should choose to be Jewish for the sake of Jewish continuity as redundant. This is an important counterpoint to Wertheimer’s statement that “in the Jewish world... community has a special resonance in that it is an end in itself; the community is not simply a means of organizing individuals to do the work of the group, but the entire Jewish community (*Klal Yisrael*) is a value in and of itself.”¹⁰⁶ Cotler’s presentation does not dismiss the intrinsic value of the community, but it does highlight that the possibility of asking “why choose to be Jewish,” is a call for collective soul-searching and an appeal for visionary moral leadership.

Cotler observes that Jews today are anxiously experiencing lack of agreement about shared purpose, insufficient coordination of resources, and declining responsibility for the community as a whole.

In the Center for Creative Leadership’s view, leadership is the generation of direction, alignment, and commitment among people with a common purpose.¹⁰⁷ At the heart of concern for Jewish continuity is the issue of Jewish identity. Cotler observes that Jews today are anxiously experiencing lack of

agreement about shared purpose, insufficient coordination of resources, and declining responsibility for the community as a whole. To make Jewish identities appealing to the next generation, Jewish leaders must understand this and rise to the challenge by modeling how living a Jewish life translates to living a meaningful and purpose-filled life.

What is an inspiring, meaningful purpose today?

It is also important to be mindful that the sources and manifestations of meaningfulness are personal matters, and the diversity of the community will be reflected in diverse ways of finding meaning and living meaningful lives. At its core, “meaning derives from a deeply felt experience that gives rise to new interpretations and direction.”¹⁰⁸ The backgrounds and experiences of Jews are increasingly diverse and younger Jews will be inspired by aspirations and visions that speak to their own experiences in the world. “To really inspire us, we need a challenge that outsizes the resources available. We need a vision of the world that does not exist yet. A reason to come to work. Not just a big goal to achieve. This is what leaders of great organizations do. They frame the challenge in terms so daunting that literally no one yet knows what to do or how to solve it.”¹⁰⁹ Meaning derives from the relevance of the aspiration to one’s experience as well as the need to struggle in the face of difficulty to achieve it.

Individuals can find meaning in any aspect of life, but for many, “community is an important source of meaning in an age when individuals search for meaning, both inside and outside a religious framework.”¹¹⁰ It’s exciting to be a part of a communal effort, especially where there is a shared sense of

Cultivating diversity among the leadership of a Jewish organization is an important factor in keeping the mission and work of the organization meaningful to diverse audiences and potential supporters.

urgency and meaningful aspiration.¹¹¹ Today, the communal causes that younger generations of Americans – including American Jews – find meaningful and challenging are struggles for social justice. “The pursuit of social justice as the most worthwhile Jewish characteristic is echoed by many informants, such as one young rabbi who... sees fighting for justice as the only nonnegotiable, quintessential, core Jewish activity. ‘Don’t keep kosher, that’s fine, don’t keep Shabbat, that’s fine, marry a non-Jew—whatever. But understand that it will take away your Jewish identity if you don’t fight for justice,’ she says.”¹¹² In this framing, Jewish leaders are those who are engaged in an active struggle for social justice – doing so is what makes their work Jewish and what elevates them as leaders.

In Jewish organizational settings, inequality can manifest in biased hiring or promotional practices, resulting in a lack of diversity and “stark gender inequality across the field.”¹¹³ By contrast, “inclusive leadership taps into the broadest pool of talent, unleashes skills and passions, and creates deep wells of engagement and loyalty among teams. Leading inclusively also has the moral underpinning of a simple truth: lead others as you would wish to be led.”¹¹⁴ Diversity and inclusion also relate to the efficacy of the educational work. Leading in education will “require a commitment to significantly increase the diversity of education leadership, both to better reflect the communities served... and to bring the right mix of experience and insights.”¹¹⁵ Cultivating diversity among the leadership of a Jewish organization is an important factor in keeping the mission and work of the organization meaningful to diverse audiences and potential supporters.

See also:

I'm Never Coming Back¹¹⁶

Leveling the Playing Field: Advancing Women in Jewish Organizational Life¹¹⁷

New Jewish Feminism: Probing the Past, Forging the Future¹¹⁸

Standing at the Crossroads: Next Steps for High-Achieving Women¹¹⁹

Kick Some Glass: 10 Ways Women Succeed at Work on Their Own Terms¹²⁰

Start with Why¹²¹

Daring Greatly¹²²

Quest for Inclusion¹²³



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Education Challenges

The topic of Jewish education is closely linked to the topic of Jewish identity. “Jews, like others, are exhibiting increasingly idiosyncratic configurations of Jewish identity. Religious individualism, privatization, and the phenomenon of ‘personalism’ characterize an increasing number of Jews.”¹²⁴ It has long been established that a one-size-fits-all approach to education will not be successful in impacting Jews with increasingly personal needs, interests, and priorities.¹²⁵

In 2012, Jonathan Woocher outlined an agenda for transforming Jewish education in response to the changing social landscape of Jewish identities in the 21st century. To succeed, the Jewish educational system would need to “accommodate learners as ‘prosumers,” empowered “to create their own educational experiences, and to guide them on lifelong learning journeys.”¹²⁶ Like Liebman and Silberman, Woocher recognized that modernity affords Jews a greater degree of freedom and mobility regarding how – or even if – they will choose to cultivate, maintain, and express a Jewish identity.¹²⁷

The freedom to choose can be interpreted as an open market in which different identities and ways of life must compete to attract potential community members. The daily lives of Jews are as busy as those of any other American community and people must constantly choose how to prioritize and spend their limited time. An after-school program offering experiential learning experiences for Jewish youth must compete for that time against alternatives such as soccer practice or any other after-school activity, and facilitating any of those activities for youth may reduce the time available to Jewish parents for participation in Jewish educational activities serving adults. “Increasingly, religious adherents have adopted a more tentative, and frankly more consumerist, approach to their religious membership... Religious identity has become privatized, personalized, idiosyncratic, and voluntary.”¹²⁸ Thus, “there is a critical need for religious leadership with educational and cultural skills that can compete for loyalty and attention in an open society.”¹²⁹ To stand as an appealing option in this market, Jewish education must become “more learner-centered, relationship-infused, and life-relevant.”¹³⁰ According to Woocher three avenues stand out as having the best potential to achieve the above objectives. Jewish education can

systematically adapt to meet those needs “by maximizing the impact of ongoing innovations, by employing ‘design thinking,’ and by forging stronger networks and collective impact initiatives across domains and settings.”¹³¹ An economic analysis of these strategies reveals two questions: what does the market audience need, and how can resources and networks be best leveraged to provide for that demand? This requires a shift toward learner-centered approaches to curriculum and delivery design, which was a cornerstone of Woocher’s vision for Jewish education reform.¹³² The first strategy, “maximizing the impact of ongoing innovations,” focuses on precisely determining the best implementation of a process through incremental improvements to the process. The third, “forging stronger networks,” points to the need for a networks-level approach that puts all of the organizations and other actors in a complex economy to work in ways that maximize impact for each and for the system as a whole.

[This] points to the need for a networks-level approach that puts all of the organizations and other actors in a complex economy to work in ways that maximize impact for each and for the system as a whole.

See also:

Educating the Muslims of America¹³³

Global Perspectives on Educational Leadership Reform: The Development and Preparation of Leaders of Learning and Learners of Leadership¹³⁴

Defining “Jewish Education”

There is no agreed-upon definition of Jewish education, nor is there any common understanding regarding the scope and limits of a field of Jewish education. Greenberg said that “the educational task is the central test of leadership if American Jewry is to survive and flourish,” but the nature of that task remains undefined.¹³⁵

In fact, among self-described Jewish educators, professionals in the Jewish nonprofit sector, and Jewish thought leaders, the scope of Jewish education is contested, as is the question of who should be considered as contributing to Jewish education.

The Jim Joseph Foundation maintains a particularly expansive notion of what constitutes Jewish education or Jewish learning experiences, describing them as “experiences that draw upon Jewish wisdom, values, practices, culture, traditions and history to engage people in activities that guide them towards living more connected, meaningful and purpose-filled lives.”¹³⁶ Creating the opportunities for those experiences is not uniquely the job of a teacher; Jewish education comes about through an interconnected ecosystem of individuals playing a variety of roles, including learners of all sorts, teachers and experience facilitators of all sorts, organizers and professionals who support their work, managers, administrators, executives, board members and volunteer board members, and philanthropists, not to mention countless partners doing related work. In a sense, people serving in all of those roles have their parts to play in facilitating and participating in Jewish education.

In the literature, it is common to see a distinction made between formal and informal (or experiential) Jewish education. In this schema, formal education generally refers exclusively to classroom interactions, and the teachers in those classrooms are the only professionals deemed to be educators or involved in education. Meanwhile, school administrators, board members, volunteers, and the school’s funders may not perceive themselves or their work as having any connection with the field of Jewish education. This view has been directly critiqued, with Shuki Taylor arguing that “a wider range of Jewish

professionals, from fundraisers to program directors to farmers need to see themselves as educators,” who should “approach their work from a learning perspective.”¹³⁷ Daniel Pekarsky has also criticized this bifurcated model as counterproductive, not only because all education is inherently experiential, but also for the way the term “experiential education” can undermine serious efforts to focus on fostering effective educational programming.¹³⁸

Lack of clarity around the terminology and contributors to a field of Jewish education is a significant topic. Further study would be beneficial to consider the possible ramifications of the Jim Joseph Foundation and other organizations defining priorities by means of terms that practitioners in the field may not recognize as applying to themselves or their work. Throughout this report, our focus is on leaders who play a role in the broad, mostly nonprofit ecosystem that makes Jewish education, engagement, and learning possible. It will include the challenges and opportunities of leaders ranging from teachers to congregational leaders, volunteers to donors, researchers and evaluators to nonprofit professionals.



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Professional Pipeline Challenges

Cultivating Talent for Senior Leadership

Hal Lewis wrote that “the most important job of a leader is cultivating leadership in others.”¹³⁹ The 2014 inaugural report of the Leadership Pipelines Initiative (now Leading Edge) conveyed the urgent need for cultivating leadership within the Jewish organizational sector by means of a striking statistic: “The vast majority of Jewish nonprofits – 75% to 90% by some estimates – must find new executive leadership in the next 5-7 years. Finding the right leaders to move immediately into these openings is already proving difficult.”¹⁴⁰

The importance of executive transition planning to maintain organizational stability had long been recognized, but the developmental support needed to actually cultivate a new generation of leaders was still sorely lacking.¹⁴¹ By 2006 Hal Lewis noted a “widely acknowledged lack of mentoring and coaching available for many aspiring lay and professional leaders in the organized Jewish community.”¹⁴² Seven years later, the situation was much the same, and even basic “on-the-job support and training that leaders need to develop in their careers” is rarely provided because of a tendency among organizations to consider professional development in terms of overhead to be minimized.¹⁴³ The difficulty organizations were experiencing in identifying talented professionals to succeed retiring executive leaders is just one of a cascade of negative consequences of decades of system-wide struggle to adequately support talent development within the field.

The process of career advancement within Jewish organizations has also suffered. On one hand, the quality of the organization’s work suffers when “lay and professional leaders are routinely elevated to positions of importance without appropriate training and absent the ongoing opportunity for mentoring and coaching.”¹⁴⁴ On the other hand, an employee who is highly talented may not find sufficient

opportunities to demonstrate their leadership capability, and could consequently be overlooked as a promising candidate for open leadership positions. Jewish professionals have reported feeling that “hiring committees look elsewhere when filling open senior positions... they don’t always value the potential of their own staff and others in the field.”¹⁴⁵ Whether it is warranted or not, the perception that Jewish professionals will have limited opportunities for career advancement in the sector is an obstacle to attracting and retaining talent, which is a prerequisite challenge to cultivating a talent pool for senior leadership positions.¹⁴⁶

See also:

Executive Selection: Strategies for Success¹⁴⁷

CEO Search Committee Guide: A tool for nonprofit volunteer leaders conducting a CEO search¹⁴⁸

Developing Tomorrow’s Leaders Today: Insights from Corporate India¹⁴⁹

Managing Transitions: Making the Most of Change¹⁵⁰

Filling the Leadership Pipeline¹⁵¹

The Leadership Pipeline: How to Build the Leadership Powered Company¹⁵²

The Wake Up Call: A study on leadership in the nonprofit sector¹⁵³

Attracting & Retaining Talent

The 2014 Leadership Pipelines Initiative report warned that “many Jewish organizations don’t have the value proposition to attract and retain the leaders they need.”¹⁵⁴ The same concern had already been raised by many authors, and as early as 1991 in a report by the AJC Task Force on American Jewish Leadership.¹⁵⁵ Attracting and retaining talent is a perennial challenge, and potential employers should be aware of what factors are most likely to attract early career professionals to work in the Jewish community sector. Removing barriers to entry is the first step to enlarging the talent pool, but career prospects in the sector also need to be attractive.¹⁵⁶

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would improve the value
proposition for potential talent
in the Jewish social sector.*

Professional Jewish community work can be “quite onerous and taxing” and “demand significant time commitment.”¹⁵⁷ Leadership positions in particular may entail “excessive workloads and travel demands,” or “activities such as donor and volunteer relationship-building that require long hours beyond the 9-5 workday.”¹⁵⁸ Jewish early career professionals are not necessarily averse to hard work, but may be discouraged by other factors relating to organizational culture.

Recent research on the expectations of Millennials entering the workforce has found that they are often driven by a sense of mission or purpose, and want to feel that their work makes a positive contribution to society.¹⁵⁹ However, they are also seeking working environments in which they will find workplace flexibility and opportunities for collaboration, meaningful coaching in the form of support and feedback without micromanagement, and competitive structures of compensation.¹⁶⁰ A similar pattern of career priorities has been observed among emerging Jewish leaders. They can be “quite driven and willing to take on challenging roles, but not in organizations with rigid cultures that lack collaboration, innovation, and autonomy.”¹⁶¹ A supportive workplace culture would improve the value proposition for potential talent in the Jewish social sector. Overwhelmingly, “the next generation of leaders are not choosing to work in the sector altogether. They pointed to issues such as steep hierarchies and bureaucratic

cultures, little autonomy for junior and mid-level staff to take risks and feel ownership over their work...”¹⁶²

The prospect of “low salary levels compared to jobs outside the sector” makes such positions significantly less appealing.¹⁶³ Reflecting on the incongruence of what early career professionals are seeking and what they are likely to be offered in the Jewish sector, Mark Young speculated:

If entry-level Jewish communal professionals earned \$54,000 plus attractive health benefits, and received effective managerial guidance and visible opportunities for career growth...the field of Jewish communal service would easily attract and retain the best and brightest, and employers could then select and retain the most intelligent, creative, and productive professionals available.¹⁶⁴

This line of thinking is supported by research on what workers value most from their employment.¹⁶⁵ For example, Leading Edge has conducted research in an effort to “establish field-wide criteria for what it means to be a great place to work and educate organizations about these best practices.”¹⁶⁶ Their Leading Places to Work research identifies five factors as especially significant: “trusted leaders, common purpose, respected employees, talent development, salary and benefits.”¹⁶⁷

Providing on-the-job talent development has been highlighted repeatedly in research for its potential to uplift the entire sector, and several specific proposals have focused on the need for networks-level interventions, such as supporting “a training program for mentors” or “a ‘Chief Talent Officer’ who could provide shared services to multiple organizations and help the community think strategically about identifying and cultivating top talent across the field.”¹⁶⁸ These proposals suggest that the sector should develop leadership strategically as “a system-wide capability, not an individual personality trait.”¹⁶⁹ Fostering an organizational culture of talent development can drive a range of positive outcomes. A report by EdFuel concluded that “developing and advancing today’s education leaders promises to reduce turnover, boost retention, and increase diversity.”¹⁷⁰

Providing on-the-job talent development has been highlighted repeatedly in research for its potential to uplift the entire sector, and several specific proposals have focused on the need for networks-level interventions.

See also:

The Leadership Gap: What you need, and don't have, when it comes to leadership talent¹⁷¹

Call to Action: How lay leaders can overcome the Jewish community's leadership pipeline challenge¹⁷²

The Wake Up Call: A study on leadership in the nonprofit sector¹⁷³

Women in the Executive Recruitment Process: An executive search professional's perspective¹⁷⁴

A New Generation of Professionals: Reflections and Strategies - Recruitment and Retention¹⁷⁵

Coaching for Leadership: Writings on Leadership from the World's Greatest Coaches¹⁷⁶

The Leadership Coaching Sourcebook: A Guide to the Executive Coaching Literature¹⁷⁷

Mentoring at Work: Developmental Relationships in Organisational Life¹⁷⁸

Feedback to Managers: A Guide to Reviewing and Selecting Multirater Instruments for Leadership Development¹⁷⁹

The Leadership Machine: Architecture to Develop Leaders for Any Future, 3rd Edition¹⁸⁰

Healthy Workplaces and Organizational Cultures

Trusted leadership is important for professionals at all levels within an organization. Earlier studies have highlighted the importance of fostering productive cooperation between lay leaders and professional staff, noting that “demanding jobs are made even less appealing because of commonly reported strained lay/professional relationships that leave some senior leaders feeling undervalued and undermined by the Boards they work with.”¹⁸¹ The field should take seriously reports that “in Federations and JCCs, professionals *and* volunteers struggle to navigate the tempestuous waters of their own working relationships, as do congregational rabbis and their boards of trustees.”¹⁸² Lewis noted that leadership of a healthy organization must be rooted in healthy relationships among the organization’s leadership, saying that “successful functioning... depends on effective teamwork among professionals (in various capacities) and lay leadership... perhaps no relationship is as crucial as that between rabbis and their lay boards and officers.”¹⁸³ The same is true of other top-level organizational leaders. For example, Leading Edge quotes one Jewish lay leader as saying “the only way we will change our organizations is through the CEO and the board chair working together in a dancing hevruta” (or learning partnership).¹⁸⁴

However uncomfortable it may be to confront conflicts among leadership, it is critically important to the work of the organization.

Unfortunately, “the reality and/or perception of dysfunction is widespread...[and] present to a certain degree in almost all Jewish organizations.”¹⁸⁵ This challenge poses a threat to recruitment of talent into the field and contributes significantly to turnover and loss of talent from the field as professionals seek healthier working environments. Barry Rosenberg observed that “most complaints come from professionals, many of whom describe the environment as toxic,” and yet the problem and possible ways of addressing it “is rarely discussed openly or constructively.”¹⁸⁶ However uncomfortable it may be to confront conflicts among leadership, it is critically important to the work of the organization:

Boards of trustees that ignore divergent values and perspectives within their ranks because exploring and confronting them are too uncomfortable are not really serving their constituents. Allowing the pursuit of consensus to impede bold decision making out of fear of alienating a major contributor (or customer) is not effective leadership. Tolerating professional incompetence or inappropriate behavior from lay leaders because of a dearth of viable alternatives perpetuates dysfunction throughout the enterprise.¹⁸⁷

Given that tensions among leadership can be detrimental to organizational success, recruitment, and sustainability – not only for the particular organization but for the field as a whole – addressing and systematically resolving those tensions should be considered a top priority. A process for boundary spanning and resolving tensions among leadership should focus on “role clarification, governance, management, and developing a shared vision.”¹⁸⁸

See also:

- Difficult Conversations: How to Discuss What Matters Most¹⁸⁹
- When Leadership Goes Wrong Destructive Leadership, Mistakes, and Ethical Failures¹⁹⁰
- Implementing Organizational Interventions: Steps, Processes, and Best Practices¹⁹¹
- The Advantage: Why Organizational Health Trumps Everything Else In Business¹⁹²
- Building Conflict Competent Teams¹⁹³



POLARITY



COMMUNITY



EDUCATION



PIPELINE



NETWORKS

Network Challenges

The importance of leadership across boundaries is not limited to denominational boundaries and organizational functions. Diversification of Jewish identities has its corollary in the diversification of organizations serving the Jewish social sector. Maximizing the success of a widening range of organizations will require “a commitment to interdependence that goes well beyond platitudinous expressions of one-for-all-and-all-for-one.”¹⁹⁴ As more and more services are offered to the same Jewish communities, tensions can naturally arise. Lewis observed that “today’s Jewish communities... are consistently marked by internecine tensions between fundraisers and educators, clergy and philanthropists, community relations advocates and academics.”¹⁹⁵ Wertheimer echoed this observation and mentioned the importance of establishing relationships. “Of particular relevance are relationships that cross boundaries... These relationships tend to be fraught with competition, tension, and misunderstanding. Studies of leadership in the corporate world have been animated by questions of shared leadership, partnership, and alliances. These questions have been a constant source of concern for American Jewish communal leadership where tensions between professionals and laity, and between congregations and other institutions, are common, if not ubiquitous.”¹⁹⁶ Such conflicts can have a profoundly negative effect on critical working relationships and interfere with the ability of various parties to accomplish their work. Therefore, building positive relationships among leaders in different roles and across a variety of organizations is a necessary prerequisite to building a more supportive shared Jewish organizational ecosystem.

Building positive relationships among leaders in different roles and across a variety of organizations is a necessary prerequisite to building a more supportive shared Jewish organizational ecosystem.

The boundary spanning work needed to address networks-level issues will depend upon bringing together the full range of diverse stakeholders. The Leadership Pipelines Initiative (now LeadingEdge) noted that “throughout our research we have consistently heard how critical it is to address these issues in a highly inclusive way, incorporating the perspective of multiple groups of stakeholders in solution generation.”¹⁹⁷ A successful Jewish boundary spanning leader will be able to reach out “to the left, to the ‘new age’ Jews, to the marginal and oppressed Jews... toward the Federations and... toward the established activists and the mainstream rabbinate.”¹⁹⁸

Bringing together the new and the established would go a tremendous distance toward meeting the challenge. Combining the scale, reach, and fundraising power of the existing Jewish communal institutions with the energy, passion, and excitement of next-generation leaders and ideas would be a potential game-changing force. Yet that partnership requires something from both sides: Established institutions would need to commit to a much higher degree of risk-taking, and next-generation leaders will have to be willing – and able – to tackle larger, more complex problems.¹⁹⁹

Boundary spanning and systems of distributed leadership at the level of networks carries a high potential for positive impact benefiting the entire sector. The Leadership Pipelines Alliance formed to approach the needs of the field through a system-wide perspective, “to create a forum for the field as a whole, across all organizational structures,” where “organizations and leaders – both lay and professional – from across the field are invited to join and help drive these efforts forward.”²⁰⁰ In the Forward of that report, Rachel Garbow Monroe wrote, “we believe to truly move the dial, the entire field needs to take action – we need a neutral, collaborative platform that enables everyone to get involved and become part of the answer. We can’t just ask one organization to go ‘solve’ the problem for us.”²⁰¹

Boundary spanning and systems of distributed leadership at the level of networks carries a high potential for positive impact benefiting the entire sector.

A community-centered approach to boundary spanning is not unusual. “In today’s most effectively run enterprises, teamwork is nurtured, information transfer is enhanced, and networking is expanded because of a systematic commitment to shared leadership.”²⁰² Successful boundary spanning interventions to foster mutually beneficial interdependence will depend upon leaders who are able to see the bigger picture and take on the role of “ecosystem engineers.”²⁰³ They will need to be “collaborative boundary spanners, who will emphasize broad concerns and community building rather than institutional preservation.”²⁰⁴ Their

role will be to develop “systems of shared power incubate creativity across a variety of institutional silos and create invested stakeholders and constituents.”²⁰⁵ Woocher, who was a staunch advocate of leveraging networks to achieve network-level impact, said that “there is a long way to go before we can say that Jewish education is making full and effective use of networks, open source processes, or collective impact initiatives to generate the pace and volume of change called for today.”²⁰⁶

Some specific examples of projects a networks-minded leader could advance have already been raised. For example, establishing “a training program for mentors” or “field-wide rotation programs” in which “promising talent could be provided with in-depth experiences at a number of organizations across different functional positions to gain exposure to a host of skills and issues and to build relationships and experiences across the field, thus preparing them for senior leadership roles.”²⁰⁷

Field-wide network analysis studies would be instrumental to provide ecosystem engineers the information needed to identify high potential impact initiatives and collaborations that could benefit the field as a whole.

See also:

- The Starfish and the Spider: The Unstoppable Power of Leaderless Organizations²⁰⁸
- Exploring the Next Step in Your Leadership: From Organizational Change to Systems Change²⁰⁹
- The Power of Big Data to Transform the Jewish Community²¹⁰
- Catalyzing Networks for Social Change: A Funder's Guide²¹¹
- Collective Impact²¹²
- High Stakes Donor Collaborations²¹³
- Net Gains: A Handbook for Network Builders Seeking Social Change²¹⁴
- Synergetic Economics. Scientifical Approaches of Synergistic Economic Networks and Systems²¹⁵

Literature Review Summary

Our literature review identified several themes about the nature of Jewish leadership and the leadership needs of the contemporary Jewish community. It is clear even from classical literature that the heritage of Jewish tradition includes a robust vision for a distinctly Jewish style of leadership. It is collaborative by design and intentional about circumscribing the authority and power of individuals in order to hold space for a plurality of views. The competencies necessary for individual Jewish leaders to be effective leaders are similar to those needed for any leadership role, however, the contemporary contexts and circumstances of Jewish communities are unique, and the most critical leadership needs at this moment are those that will enable Jewish leaders to address the challenges of the day and prepare for the future.

The literature and contemporary discourse points to five categories of challenges as most significant.



The first category is **polarity challenges**, such as the cultural shift from a community orientation that prioritizes consolidation and security to one of diversity and exploratory risk-taking. Jewish leaders will need to understand the potential value of each orientation and have the skill to manage the shifts between these polarities without allowing either orientation to become extreme.



The second category, **community challenges**, relates to developing and maintaining a communal sense of Jewishness that appreciates rather than conflicts with the reality that individual expressions of Jewish identities will continue to diversify. Navigating these challenges will require visionary leadership that inspires Jews to share concern for one or more meaningful purposes.



Education challenges are closely related to the diversification of Jewish identities. Individuals must make choices about how to allocate their limited time and attention while engaging with multiple aspects of their own personal identity. People have busy schedules, and not every Jew will necessarily prioritize engaging with Jewish aspects of their identity above their possibly multitudinous other interests and worldly concerns. To compete in this busy social context, Jewish education must appeal to the needs and priorities of individual learners. By integrating Jewish learning with learning and activities that are simultaneously relevant to other aspects of the learner's identity, Jewish education can be the more appealing choice by providing a greater benefit and return on the learner's investment of time. Since this will require Jewish education to take on a number of novel approaches and forms, Jewish communities will need to reconsider what the field of Jewish education looks like and entails to include a far greater range of program types and activities.



The **professional challenges** confronting Jewish leaders today are similar to those facing other organizations in the social sector. These include attracting and retaining top talent and preparing Jewish professionals with the skills and resources needed to succeed and advance into new or newly-vacated executive positions or other leadership roles. Meeting this challenge will require building powerful professional development and leadership development opportunities into every facet of Jewish organizational work, and possibly field-wide collaboration to provide shared resources for mentorship and coaching. On a more basic level, a critical skillset to be developed is familiarity and facility in navigating the nonprofit sector, and particularly how to achieve excellence in nonprofit governance as well as organizational operations and management.



All of the above are also critical **network challenges** because meeting these challenges is beyond what can be expected of any single organization. It will be imperative to develop new network-oriented systems and practices that facilitate field-wide collaboration. Not only is this in alignment with the Jewish model of collaborative leadership, but it is supported by the latest thinking on distributed network leadership and collective impact. The need for field-wide collaboration has long been recognized, but new approaches to network analysis and network engineering will be essential to identify strategic levers for intervention and to provide guidance for collaboration efforts.

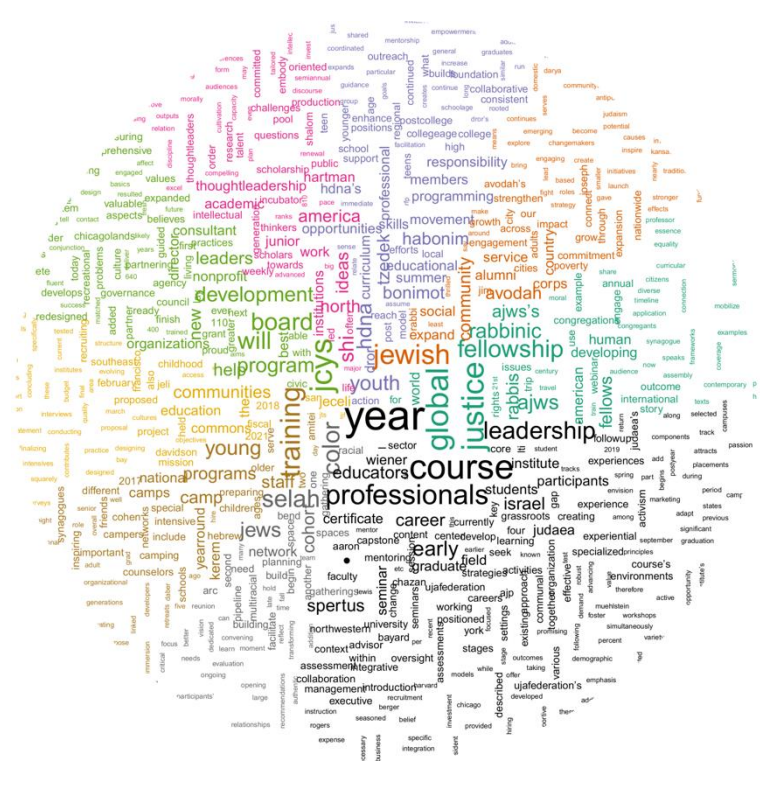
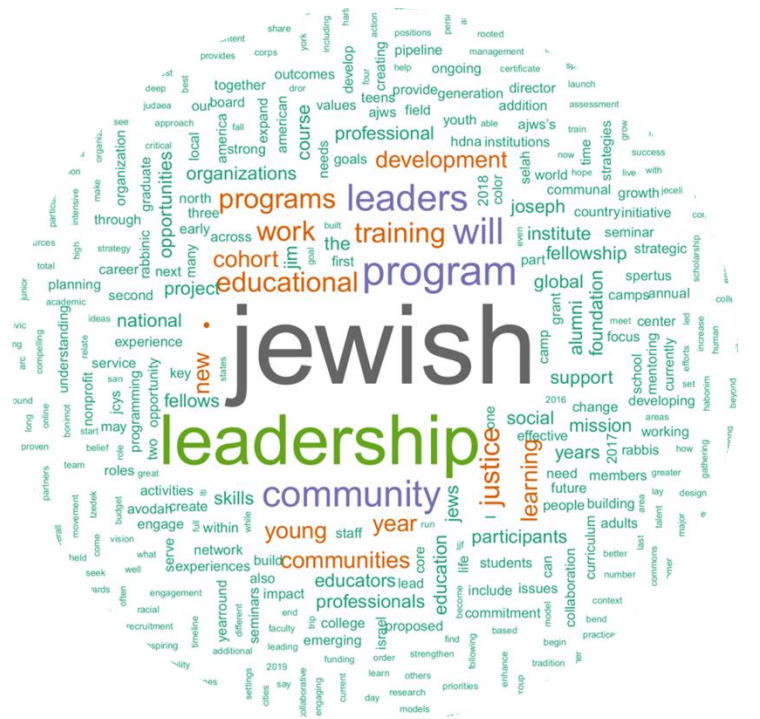
PORTFOLIO REVIEW

This section presents our initial review of the portfolio of grantees included in this study. We reviewed the documents received for all grantees, including their proposal timelines and letters of intent. The grantee LOIs were coded for the following topics: core needs addressed, key competencies developed, methods of delivery, specified program goals, and implied program outcomes.

The specified goals and core needs were the most informative to understand trends across the portfolio. When paired with the content of the literature review and the presentation of the five key areas of leadership challenges, we can view the portfolio in terms of its collective ability to meet these challenges.






After all LOIs were coded, we mapped them onto the initial leadership challenges identified through the literature review. We then mapped the stated program goals or core needs met to each of these challenge areas. Because each program is likely to at least touch on some of these topics in some way, we kept our coding limited to the LOI documents and present the coding summaries in aggregate, so as not to highlight specific programs but rather to look at the portfolio as a whole. The figure on the top right presents a data visualization of the prevalence of words across all 11 LOIs from the portfolio. The figure on the bottom right presents a data visualization for the text of each LOI on its own. Across all programs we see an emphasis on leadership, community, justice and learning. Within programs, we see how each program is unique, some focusing on training, youth, board development, early career leaders, Rabbinic fellowships, and program expansion.

The table below presents the coding of core needs and program goals mapped onto the leadership challenge themes. From this exercise, we see that all programs address issues of networks, identity, and the leadership pipeline in some way. Fewer describe needs in terms of polarities or, more specifically, managing conflict or change. These topics may be so broad and pervasive that they would be challenging to spell out in a proposal or identify specific curricular components of program design that



map onto them. However, it is notable given the exponential growth of polarity work within the field of leadership development and the prevalence of polarities within Jewish leadership that these topics were not emphasized more.

How many grantees in the leadership development cohort identified the following themes as a core issue in their grant LOI or made it an explicit part of their program design?

THEME	TOTAL	CORE NEEDS OR PROGRAM GOALS	COUNT
 NETWORKS	11	Networking, making new connections, or expanding reach or the organization	9
		Developing partnerships and collaboration	5
		Cohort building or alumni retention	7
		Convening and community building	5
		Establishing communities of practice or communities of learning	5
 COMMUNITY	11	Youth, next-generation, or millennial engagement, especially regarding issues of complex identity	9
		Diversity, inclusion, and pluralism (racial, denominational, geographic, etc.)	7
		Jewish values, human rights, ethics, social justice, civic engagement or activism, community engagement, or community service	6
 PIPELINE	11	Facilitating a professional and/or leadership pipeline for Jewish organizations	9
		Leadership development, communication, skills development	7
		Nonprofit skills, lay leadership, governance, or organizational capacity building	5
		Mentoring, coaching, or apprenticeship	5
 EDUCATION	9	Providing lectures, seminars, webinars, workshops, or virtual learning opportunities	9
		Engaging in action learning or service learning	8
		Educational leadership or thought leadership, for example through curriculum design, research, publications, and media	8
 POLARITIES	3	Managing conflict or change	3

Looking more closely within each category, we identify a few key takeaways from this exercise. First, although all grantees view network development as a critical need their programs will seek to address, a larger number of grantees are attentive to networking with the goal of fostering new connections and expanding programming than those that are expressly interested in networking to develop deeper collaboration and toward building communities of practice or learning. This mirrors much of what we

see in the nonprofit world more broadly. While building deep, trusting, truly collaborative relationships to work toward collective social change is extremely challenging, the Jewish community shares values, history, and community narratives that would likely offer a solid platform for building these relationships more purposefully.

Second, with regard to the professional pipeline, we see that there is immense focus on building a pipeline of future Jewish leaders, in conjunction with a majority of the programs emphasizing next-generation, youth, and/or millennial engagement. There is less emphasis on lay leadership, governance, organizational capacity building, and mentoring or coaching. While the in-depth analysis of our interviews of Jewish leaders will be a focus of our work in Year 2, we noticed that these specific issues relate to overarching themes already emerging from the interviews. Specifically, many of our interviewees brought up challenges related to lay leadership and navigating board relationships. While one potential remedy could simply be to incorporate communication, feedback, and conflict management with specific scenarios related to navigating these tensions, it is possible that that solution only addresses half of the equation. As we continue this work, we intend to explore what specific needs lay leaders may not be receiving in terms of leadership development which may be hindering their ability to fully connect, communicate, and collaborate with their professional leaders. Additionally, many of our interviewees emphasized the roll of coaches and/or mentors as being pivotal for either their entry or persistence in the field of Jewish leadership. It is also important to note that within our work in the broader nonprofit sector, we are learning about the key differences between coaching and mentoring relationships. In the Jewish community, for example, a mentor may serve as a lifelong guide, connecting with the mentee around issues of faith and values. A professional coach may offer a different set of resources, focused on specific leadership development needs in certain contexts, related to new roles, or around specific challenges. Understanding that these experiences of social support may not be present in the same way for different individuals has ramifications for the types of experiences funded and incorporated into program design.

See also:

Developing Tomorrow's Leaders Today: Insights from Corporate India²¹⁶

Inspired Jewish Leadership: Practical Approaches to Building Strong Communities²¹⁷

ASTD Handbook for Measuring and Evaluating Training²¹⁸

The Talent Management Handbook, Third Edition: Making Culture a Competitive Advantage by Acquiring, Identifying, Developing, and Promoting the Best People²¹⁹

The 2018 State of Leadership Development: Meeting the Transformation Imperative²²⁰

FIRST YEAR REVIEW OF ACTIVITIES

Literature Review

We conducted a thorough review of literature on Jewish leadership and general leadership development. Major themes that emerged included the challenge of managing change, leading an increasingly diverse community, and the many professional challenges related to Jewish nonprofit and educational endeavors.

The full literature review is presented above.

Portfolio Review

We conducted an initial review of leadership development programs conducted by organizations included in the Jim Joseph Foundation's Leadership Development grantee cohort.

Initial findings from the review are presented above.

Alignment Meetings

We aligned our research process and activities with the strategic goals of the Jim Joseph Foundation through regular update meetings, as summarized in the table below:

04/08/18	Grant launch in SF
08/08/18	Preparation for the Convening, planning process for interviews.
08/20/18	(Seth, Jeff, Lynn, Valerie, Brendan) Preparation for the Convening.
09/05/18	(Seth, Stacie, Valerie, Brendan) Post convening discussion, JJF excitement about serving as a network-weaver for grantees.
10/31/18	Review of Convening notes.
11/20/18	Discussing network research approaches.
01/08/19	(Seth, Valerie, Brendan, Hal) Excitement about financial networks model and where to go next with networks research.
02/11/19	(Seth, Stacie, Valerie, Brendan) Preparing for second round of interviews. Updates from Seth and Stacie, thinking about shifting the timeline and focus of the study.
03/15/19	(Seth, Stacie, Valerie, Brendan) Update on Year 1 Report, priorities for Year 2, and planning April 2 meeting in SF.

August 2018 Leadership Convening

Lynn Fick-Cooper, Valerie Ehrlich, and Brendan Newlon attended the Jim Joseph Foundation Leadership Convening from August 27-29 in the Catskills. Lynn served as the facilitator for the Convening and led sessions. Valerie gave a presentation about our research process and goals and facilitated an exercise using CCL's Visual Explorer cards. Valerie and Brendan recorded notes and documented the convening.

The convening was a catalyst for our research and allowed us to gather and share a significant amount of information. As a result of the convening, we produced the following:

Convening Documentation Report: In total, 83 pages of notes, photographs, and embedded documents capturing the events and dialogue of the convening.

Post-Convening Survey: A survey distributed to elicit feedback from convening participants about their experiences and hopes for future convenings. The survey we distributed can be found online: https://ccl.az1.qualtrics.com/jfe/form/SV_6WpPqy0hJscy5E1

Survey Report: A 25-page report with eight pages summarizing the quantitative and qualitative data gathered from Convening participants.

Convening Executive Summary: A three-page summary of the most significant things we learned through the Convening observation and Survey (attached as Appendix 1).

Site Visits

We have conducted two site visits to observe leadership development programs offered by grantee organizations:

Hazon’s JOFFEE Fellowship Program: Brendan observed the first four days of the *Jewish Outdoor, Food, Farming & Environmental Educators* program (March 5-8) to observe how Hazon initiates their cohort-based leadership development fellowship and creates a group atmosphere to foster learning.

Spertus Certificate in Jewish Leadership for Educators: Brendan observed the second of two seminars for the certificate program March 24-27.

Additional site visits will be conducted in the second year of the research study.

Lessons of Experience Interviews

Since our interview process began in October 2018, we have completed interviews with sixty-six Jewish leaders:

Aaron Katler	Anne Lanski	David Bryfman
Abigail Michelson Porth	Ari Kelman	David Cygielman
Adam Berman	Avi Rubel	David Katznelson
Adam Simon	Benay Lappe	Dean Bell
Alicia Oberman	Chip Edelsberg	Doron Krakow
Aliza Kline	Dan Smokler	Elan Babchuck
Amichai Lau Lavie	Daniel Septimus	Eliav Bock
Anna Hartman	Danielle Natelson	Elka Abramson

Eric Fingerhut	John Ruskay	Rachel Isaacs
Faith Leener	Judith Belasco	Rafi Rone
Gali Cooks	Kathy Manning	Robert Bank
Heather Moran	Lisa Goldstein	Ruth Messinger
Hindy Poupko	Liz Fisher	Ryan Woloshin
Idit Klein	Marc Baker	Sara Luria
Ilana Aisen	Mark Young	Sarah Eisenman
Ilana Kaufman	Marty Linsky	Sheila Katz
Irving (Yitz) Greenberg	Megan Harkavy	Shuki Taylor
Jacob Cytryn	Melissa Weintraub	Stefanie Rhodes
Janet Harris	Mimi Kravitz	Susan Kardos
Jeff Kasowitz	Mordy Walfish	Tamar Remz
Jen Zwilling	Nina Bruder	Wendy Rosov
Jenny Camhi	Paul Bernstein	Yehuda Kurtzer

Our interviews are ongoing. As we continue this stage of research, we plan to extend invitations to the following individuals:

Adam Eilath	Blu Greenberg	Gamal Palmer
Alex Shabtai	Charlene Seidle	Ginny Vellani
Amanda Pogani	Dan Ain	Isaiah Rothstein
Angelica Berrie	Dan Horwitz	Jay Moses
Anna Robbins	Darin McKeever	Jennifer Hoos Rothberg
April Baskin	Deborah Newbrun	Jeremy Borovitz
Ari Berman	Diane Trotterman	Justin Korda
Ari Hart	Dov Linzer	Lee Shulman
Audrey Sasson	Elie Kaunfer	Lisa Eisen
Avi Killip	Erica Brown	Lizzy Heydemann
Barret Cohn	Felicia Herman	Maya Bernstein

Mijal Bitton

Sarah Waxman

Yavilah McCoy

Rachel Monroe

Sharon Brous

Yonah Schiller

Rebecca Stapel-Wax

Shifra Bronznick

Yossi Prager

Sandra Lawson

Stosh Cotler

Sara Hurwitz

Virginia Hirshik

Finally, we will extend invitations for interviews with members of the Jim Joseph Foundation's board and staff to understand how topics related to our research are understood by people working within the Foundation, and to be especially attentive to any points of difference from how other leaders in the field have presented their thoughts on the topics. We hope to invite interviews from the following:

Alisa Doctoroff

Dawne Bear Novicoff

Rachel Levin

Barry Finestone

Josh Miller

Stacie Cherner

BUDGET REVIEW

The budget summary presented below provides cumulative data from February 2018 to January 31, 2019. We are under budget on all proposed expenses to date. We anticipate that in Year 2 we will use the remaining transcription costs and incur expenses for analysis software (Dedoose). We will continue to have additional site visits and senior consultant costs, but should remain within the budget on all of those planned expenses.

EXPENDITURES			
		Expenses	
Item	Approved	Incurred	
	Budget	(to date)	REMAINING
LABOR			
Primary Investigator	115,422	43,830	71,592
Post Doc	183,328	40,463	142,865
LABOR TOTAL	298,750	84,293	214,457
OTHER EXPENSES			
Dedoose	2,340	-	2,340
Transcription	11,813	8,250	3,563
Site Visit Travel	22,000	5,576	16,424
Senior Consultant	51,840	2,598	49,242
Jam Method Consultant	9,500	-	9,500
Miscellaneous	0	1,226	(1,226)
Other Direct Subtotal	97,493	17,649	79,843
Subtotal	396,243	101,942	294,300
TOTAL INDIRECT COSTS	47,549	12,233	35,316
GRAND TOTAL	443,792	114,176	329,616

LOOKING AHEAD: PLANNING THE NEXT PHASE

During the first year of this research project, we have primarily focused on information gathering and discovery. Our main methods were wide-ranging reading in multiple fields relevant to the project including a survey and review of the most relevant literature on Jewish leadership and leadership development practices, participation in the 2018 Jim Joseph Leadership Convening, site visits to observe leadership development programs of the Jim Joseph Foundation's grantees, interviews with diverse leaders working in the field of Jewish education or the nonprofit sector more broadly, and preliminary network analyses.

In the coming year, we will delve more deeply into the trends, topics, and interest areas that surfaced during our discovery phase. This will include conducting additional interviews and a full qualitative analysis of the interviews, as well as additional site visits.

Network Analysis and Network Engineering

One area we recognize as critically in need of further study is inter-organizational collaboration. This has been a recurring theme in the literature and contemporary discourse among Jewish nonprofit and educational leaders.

The American Jewish nonprofit space has been described as a small world where most of the influential people working in the field are either directly acquainted or are indirectly connected through a small number of intermediary contacts. Nevertheless, even organizations that are closely aligned in terms of mission and population served experience obstacles to collaboration.

We will study the types of networks (social, financial, organizational, geographic, etc.) that impact the motivation and opportunities individuals and organizations have to collaborate, share information or resources, and provide complementary services. Our goal is to understand these networks and identify types of interventions and inflection points related to individuals, organizations, or other elements of the networks that would likely result in the greatest beneficial impact, whether that is directed toward addressing critical needs, improving accessibility for underserved populations, or to advance the development of the Jewish educational ecosystem as a whole.

Jam Sessions

Sometime this summer, after our interview analysis has started, we might invite community engagement and input in the style used by our associates at Leadership Learning Community. It involves a webinar-like platform that facilitates community conversations through shared document input. We might arrange breakout sessions, for example, to group participants by their sector: day schools, camping, etc. Then, leaders of those groups can collaborate on a document that brings together the insights of their practice/sector communities. The timeframe for participation can be widened to allow for asynchronous contribution over a period of days.

As we plan the next phase of our research, we look forward to discussing how we might design and conduct the Jam Sessions in the best way to advance the Foundation's research strategy. Considerations will include the objectives of the activity, the capabilities of the collaboration platform, the timing and duration of the Jam Session(s), as well as determining who would be invited to participate and in what capacity.

Site Visits

We will continue to conduct site visits in the second year of our study to observe cohort-based leadership development programs conducted by organizations in the Foundation's leadership development grantee cohort.

Second Leadership Convening

We expect our second year of grant activities to generate more in-depth data to inform a second convening. As discussed in alignment meetings, this convening could take several forms, and we are open to discussing the best ways to collaborate and provide the most meaningful experience for attendees. We envision an activity such as the jam session (or lighter-touch experience like a webinar or virtual focus group) to gather input from a broader group of participants and inform convening activities for a much smaller group of participants. If the convening is aimed at a smaller, more concentrated group of individuals with an expressed goal of deep collaboration toward specified outcomes, we recommend pairing it with an activity like the jam session to generate data and input from a wider variety of voices to inform the work at the convening.

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