

The following sections address how leadership skills are learned and further developed in the careers of Jewish leaders.

Career Journeys

In the stories our interviewees recounted about key moments in their careers, we can generalize five career passages (summarized in the table below) that represent key inflection points for leadership learning. These passages can manifest in varying ways, they do not always occur in the same order, and an individual might experience a passage more than once.


In the terminology of the LoE framework, each of these passages is naturally embedded within the context of a leader engaging various challenging assignments, from the initial challenge of stepping into a career in the Jewish nonprofit sector to accepting the responsibility of holding the top leadership position in an organization. Each of these passages is a key moment for change that can be leveraged to support growth and development. As one of the leaders we interviewed said, “to have the greatest impact, catch people at their liminal moments.”

The idea of a leadership journey implies continual growth and development. At its essence, development is not reducible to changes in one’s internal state; it is an ongoing practice that entails learning from experience and stretching oneself to take on ever greater or less familiar challenges. Joseph Campbell made a similar observation about developmental journeys when he outlined what he called a hero’s journey in which “each challenge is a call to venture into an unfamiliar zone of experience, endure trials, overcome obstacles, and accept aid from helpers.” The experience gained by continuing on a journey is what enables one to learn, grow, and bring positive change to the world.

At this point, we are obliged to call attention to the fact that research on successful leaders inherently leaves certain questions unanswered. The qualitative portion of our study was designed to discover what we can learn from the experiences of people who are recognized as Jewish leaders, and although our interviewees shared numerous accounts about facing difficulties, we did not interview anyone whose career had actually derailed or who had chosen to leave the sector for a different career path. As a result, we do not yet have sufficient information to identify which pitfalls pose the greatest threats to a path or pipeline of Jewish leadership. Other studies, however, have explored career derailment factors, and reports such as those by Leading Edge have raised awareness that some Jewish professionals report expecting to leave the field within five years. A future study could seek to learn from the experiences and perspectives of people who have left the Jewish nonprofit sector to pursue other careers or—with due sensitivity—whose projects or organizations were ultimately unsuccessful.

Fortunately, a great deal of research has explored what leaders can do to learn more from their experiences with challenging assignments. Developmental relationships and formal training programs are also powerful means to support and encourage leaders through critical career passages and the kinds of challenging assignments experienced in each passage.

Developmental relationships were critical to supporting Jewish leaders at all five key career passages, and different types of relationships were significant at each of the passages. These relationships include personal networks such as family and friends, supervisors, formal and informal mentors, leadership development coaches, and also groups that provide emotional support or technical guidance such as communities of practice and cohorts.

A close-up, slightly blurred photograph of a desk. In the foreground, a hand is holding a wooden pencil, writing on a spiral-bound notebook. The notebook has some faint handwriting and a small sticker. To the left, there's a small white cloth bag containing several colorful marbles. In the background, a white pencil holder contains several pens and pencils. The overall scene is warm and focused on the act of writing or learning.

Leadership development is not reducible to changes in one's internal state; it is an ongoing practice that entails learning from experience and stretching oneself to take on ever greater or less familiar challenges.

Onramps: Beginning a Career

Someone Believed In Me

We heard a remarkably similar story from many of our interviewees about what event first set them on the path of Jewish education or nonprofit leadership. The common element in those stories was that someone believed in them. In many cases, leaders described mentors recognizing their talent and encouraging them to step up to a leadership challenge. This seems to have been especially salient at moments when young leaders were not aware of their own potential.

“That was the first time that someone actually told me, in a matter of speaking, that you belong as a Jewish professional, we value that choice, and we want your talents to be invested in. That was massive. No one pushed me, even in all my years at camp and in USY, no one ever pulled me aside that I can recall saying, “You should do this for life and this is what it could look like.” I kind of just did it, and then I thought I’d have to get a real job. And then I realized that real job could be in the Jewish professional lifeworks.”

Sometimes the moment of feeling believed happened in the context of a passing interaction with someone. “I remember this like very empowering experience where... the professional staff member [of the youth group] said to us [that we had complete autonomy to design the program]. To say to a kid in high school, ‘I trust you to develop this vision...,’ was really empowering.” At other times, the relationship provided a sustained sense of support through a critical period of development. “For me the most pivotal moment is I met a professional in college... and it created really the most important mentoring relationship that I’ve had and someone who really believes in me and believed in what I was doing at the time, which was not something that I found at more formal channels, I’d say. And that was really a huge turning point.”

This kind of transformative relationship experience is often a brief interaction. Even if the relationship is long-term, that moment of feeling believed in may happen during a specific meeting and yet change the course of a leader’s life. In these relationships, what makes the interaction significant is being seen and recognized as a future leader by a role model or respected person. The feeling of being supported and encouraged to accept a challenging assignment or role helps leaders to take a step forward with confidence into a role where they can continue to grow as a leader.

In several accounts, onramps were supported more explicitly, even to the point of direct recruitment that one interviewee described as “being tapped” for a leadership role.

“And probably about two weeks [in, the director] said, “I don’t know where you came from, what your background is, what your story is, but you are a natural born Jewish educator. You should do this for a living.” He totally just picked me – tapped me, as they say in the literature, you know, I was definitely tapped. And I would say that was sort of the start of my journey.”

What makes the experience of being “tapped” for leadership stand out as a turning point in the careers of so many leaders is the fact that it combines the encouragement leaders feel when someone believes in them with a prompt to immediately embrace a change of behavior, accept a new career path, or take on a challenging assignment through which a leader might gain new experience.

“I hadn’t yet determined what my career path would be. At a certain point in the program, the program director basically said, “stop partying and start taking this a bit more seriously and you have the potential to be a Jewish educator as a profession,” which is the first time when I actually seriously considered that I could make a living out of this thing called Jewish education. I don’t think if he had not—I mean, I loved

it but I don't think I would have ever considered it to be a career path had he not put it so bluntly to me at that stage."

Several people described these encounters as serendipitous; they just happened to be recommended for a role after a chance encounter or conversation. One of the leaders we interviewed suggested an intentional practice of recruiting leaders:

"I think what stands out to me on that was—First of all, the reason I got involved was because someone asked me, so I sort of learned that the way to get people, other people involved is to ask them for something, you know, one-on-one, and to say, you know, "This is something we need you to do." To make them feel important and needed without sounding desperate."

This reveals a powerful opportunity to grow the pipeline of Jewish leadership: if you believe in someone's leadership potential, it takes only a moment to tell them and to encourage them to step up in support of a meaningful endeavor or mission. If the transformational potential of interactions like these were understood by everyone who interacts with developing leaders, it could create a culture in which everyone in Jewish community settings feels capable of intentionally supporting the leadership development of others.

Early Career: Professional Development

Retention

Once a leader has stepped into their first professional role to work in the Jewish community, the immediate prerequisite to their continued journey in the sector is that the work environment they step into is conducive to employee retention. Leading Edge has highlighted the most pressing needs for employee retention in Jewish organizations in annual research reports. An important takeaway from this research is that if Jewish professionals are not shown an inviting career path ahead from their first experiences working in a Jewish organization, it may cause them to be driven away from working in the sector entirely. Ideally, a career onramp to the Jewish sector can be inspiring and instill a positive mindset. "There's no way I would have been able to have the mindset that anything is possible and we can really build and create if I had... gotten what I see as a lot of the entry level positions where you might not have a great boss, or sort of there's nowhere to go, or this and that, and they don't believe in you."

Developmental Supervision

Many interviewees shared the concern that supervisors in Jewish organizations are not always providing the kind of developmental support that early career professionals need to thrive: "I don't think—certainly not in the Jewish community, in my experience I'm not trying to—I don't think that there's been a lot of training for people to give good supervision."

The reality is that the people in the most significant positions to impact the experiences of early career Jewish professionals—whether positive or negative—will be their direct supervisors. As Gallup reported, "people leave managers, not companies." Often, poor management is the result of a lack of training in the new skills that first-time managers need to learn to be successful in a supervisory capacity rather than as a direct contributor. Therefore, a critical lever that can support talent retention would be a sustained

focus on leadership training for first time managers and anyone who directly supervises early career professionals. Programs should focus on team leadership skills such as inspiring and encouraging a team, cultivating mutual accountability, recognizing and rewarding employee accomplishments, delivering timely developmental feedback, and pairing appropriate stretch assignments with supportive coaching. Training managers can also be expected to extend leadership learning beyond the participating managers through a ripple effect caused by their positive example, which may contribute to a positive work culture and organizational success.

Several leaders told us that they felt fortunate to have had supportive supervisors early in their careers who helped them to acquire core professional skills, offered challenging opportunities, and provided developmental feedback. Many traced their leadership development journeys to early supervisors “who believed in me without question... it’s the combination of giving you autonomy, giving you support, praising your work, making time for you. That’s not a small thing to say, ‘I’m a busy person, but sure, let’s talk for a few minutes.’” Developmental supervisors provided encouragement, on-the-job training, and mentorship, while modeling the possibility of an inspiring, mission-driven career.

“I’ve actually been blessed by having several different mentors at different times. [In my early career] I had no background in non-profit management at all. And when they hired me they made it really clear that I didn’t have the experience, but they expected me to be able to grow with the job, which was beautiful. And I learned so much from [those mentors], who really worked with me, and helped me, and taught me, and learned from me, and it was really pretty amazing. And then there was a woman [in senior leadership of an organization], who was someone that I could talk to. She was really—just had like big perspective and would give me little tips in ways that were just really—she had a lot of confidence in me and that really helped tremendously.”

Learning from Failure

Stretch assignments in which employees must take risks and try new approaches are powerful learning opportunities, even when things go wrong. After providing reasonable guidance, managers can maximize the learning potential of these experiences by allowing room for autonomy and by expressing their support. This will help create an environment in which leaders can learn and grow through their failures rather than derailing.

“I went to Israel [and worked] for a year... I will say that I again, went through the moment of like the imposter syndrome of, ‘I’m totally not qualified to be doing this. But... I’m in.’ Everything I did... was done for the first time and I just—I felt comfortable with risk, felt comfortable with failure. And also the appreciation that was there for anything new I did was awesome and it could be—you know there was a comfort there.”

Leaders gain valuable experience through failures. A quality we observed almost universally among the leaders we interviewed was their ability to learn from failures. When we asked if they had ever experienced a significant failure, the most typical response was, “Yeah, [laughing] all kinds of failures. If you never failed you haven’t tried,” or “I’m sure my day and week are littered with failures. [chuckles] I don’t know if they’re epic or they’re small or they’re a combination of the two. Yeah... some things don’t pan out.” These leaders recognize failure as a normal part of life, and that mindset gives them the confidence to be innovative and take risks.

Taking risks is critical to growth, so when failures do occur, they should be leveraged as opportunities

to learn and grow. Remaining curious and asking questions to explore what happened, seeking feedback and perspectives from others to extract valuable lessons, and consciously applying those lessons in future situations provide a foundation for learning from mistakes. In an apocryphal story, an IBM sales agent makes a mistake that would cost the company a million dollars. He reports to Tom Watson, the CEO, to personally explain what went wrong and tender his resignation, but Watson replies that he will not accept it on the grounds that he has just invested a million dollars in his education.

Developmental guidance should emphasize what can be learned from failures. An individual's experience of failure can also be leveraged to afford teams and cohorts the opportunity to learn vicariously through one another's mistakes. For example, Google and other innovative businesses encourage risk and conduct "postmortem" analyses of failures as a collaborative learning activity when things fall through. In a cohort-oriented leadership development program, for example, participants could share experiences from their life journeys and what they learned through those experiences. Afterward, the group can reflect collaboratively to seek out additional lessons and discuss how those lessons can inform better practices and support their growth going forward.

Self-Directed Development

The leaders surveyed in earlier LoE studies highlighted challenging assignments as the type of experience that contributed the most to their leadership development, and Jewish leaders can actively support their own early career development by pursuing experiences that will enable them to gain or improve the skills they will need to be successful. Leaders who feel they are not receiving sufficient developmental support from their supervisor might be able to support their own development as well as their manager's development by managing up to advocate for what they need.

Alongside the guidance of supervisors, individual leaders can enhance their early career learning by means of a personal development plan. Experts in leadership development have highlighted several practices that individuals can adopt as foundations for self-directed development. For example, one may first seek feedback from colleagues or experienced mentors about which skills to prioritize, request work assignments that will support new learning or practicing new skills, and maintain a journal to track developmental progress over time. Role rotations are also an opportunity to learn different aspects of an organization's work and can be a means to gaining "new experiences related to additional supervision, institutional budgeting, strategic planning, board work and the like."

One of the leaders we interviewed also suggested maintaining a journal to reflect on one's learning and developmental progress, but added that the journal should be reviewed periodically with a mentor to benefit from a second perspective.

People often have blind spots or misconceptions about their own strengths and weaknesses. Mentorship provides the benefit of an external perspective that can help a leader develop self-awareness and recognize areas where development would be most beneficial. "I wish that I had a good mentor or coach [who] could

have helped me. They could have coached me in a way that would have helped me be more mature [early in my career]... I would say either go out and find somebody or talk to your supervisor and ask for it.” Several of the leaders shared similar advice about the value of mentorship and how to develop relationships with mentors. “Seek out mentors on your own. Doesn’t need to be formal, just connect with people, surround yourself with people who have different skills. Ask for it.” The most accessible approach to mentorship may be to ask for feedback from supervisors, colleagues, and others on a regular basis. Jewish leaders can be further supported in their development through early career training in how to be intentional and strategic regarding their own development and how to maximize learning from experience by means of practices like those mentioned above.

Summary: Early Career

SUPERVISORS are positioned to be critical to early career development. They should provide training, feedback & developmental guidance, offer appropriate stretch assignments, and show support while modeling how to learn from failures.

- **LEARNING FROM FAILURE:** Failure provides a valuable learning opportunity for individuals and groups. A positive outlook on failure is critical to enabling innovation and preventing derailment.
- **SEEKING DEVELOPMENT:** Early career leaders can be active in their development by managing up, asking for opportunities to learn new skills through stretch assignments, seeking mentors and feedback, and independent development-tracking practices.
- **EARLY CAREER TRAINING** can teach strategies for maximizing the developmental potential of work experiences.

Leadership Positions: New Responsibilities

It was common for the leaders we interviewed to describe experiences in which they were stepping out of their comfort zones. After the early career phase, these experiences often involved taking on a new leadership role. Transitions in this career passage can take several distinct forms. In many cases, it involves an increase in the scope of a leader’s responsibility. For example, leaders may be entering a managerial role for the first time or accepting a position that offers broad autonomy and responsibility. In other cases it may be launching a small start-up. In community settings, it might be accepting a congregational leadership role or leading a movement or change initiative.

Needing Technical Skills

One of the first challenges leaders face in this phase is feeling hesitant about whether or not they have the necessary qualifications for the role they will be stepping into. We often heard about situations that required leaders to learn how to blend their mission-oriented work with business skills or other technical capabilities. In their new role, these leaders often learned the skills they needed through a combination of engaging with the work and seeking to learn the skill from a board member or employee who had relevant experience. Others talked about needing to learn performance management, strategy development, or how to create an

organizational infrastructure. A takeaway from these accounts is that leaders should not rule out accepting a position on the grounds that they have not mastered all of the skills the job will require, and that it may actually be easier to develop the skills once they become necessary for one's day to day work.

"When I [started that role I] didn't think that financial skills were my strongest skills [so learned what I needed to know] and if I needed an accountant to explain something to me, I would get an accountant to explain something to me. So people who think they might not have these skills, you can—first of all, if you can balance a checkbook, you can work on your organization's budget. But you don't have to have the skills. You just have to have some common sense and a willingness to work hard."

The importance of business acumen and other technical skills was emphasized repeatedly. Interestingly, however, although a number of the leaders we interviewed have had formal education in business or nonprofit management, only a small number mentioned those experiences explicitly. Similarly, few people talked about participating in programs to develop technical skills for education. On the other hand, participants often spoke of cohort-based programs they participated in as relevant to their leadership development even when those programs were not explicitly designed for leadership development.

Many people talked about the need for technical training and skill development that would empower Jewish educators to transition successfully into more advanced leadership roles so that the strategy of an organization with an educational mission will be guided by someone who deeply understands the educational aspects of the work.

"I hope that we're able to get back to a place where Jewish educators actually have the skillsets that are seen by others to be the right people to actually run Jewish educational organizations. There's this trend that I think is really painful of the lawyer or the MBA to kind of come back in and run the organization because it really needs a CEO and that's pretty regularly not educators. And I think that's a sad state of affairs [and] not in the best interest [of the field]. For example, I'm not aware of any synagogue where the rabbi is not the chief executive. I am aware of many day schools where the educator is not the chief executive. And that's probably because A) there's a parallel to the private-school world and that job is a job about fundraising and supervision and compliance and marketing. [... there should be] a doctoral-type program... that's basically giving you MBA coursework, educational coursework, [and] nonprofit management coursework."

Another leader made the point that the relevant technical training programs differ from one role to another, so they are not always recognized for the advanced education that they are: "I did a lot of training. I'm a rabbi. And at the end of the day, rabbi is a trade school. I could have gone on for an MBA, happy to have gone on for a MBA in Judaism where you learn a lot. It's a five or six year program. And I'm very grateful that I invested the time into doing that."

Navigating the Field

However, in any field, innovative leadership will involve encountering challenges that cannot be solved using textbook solutions. There will be situations or nuances of working in a sector that are difficult to navigate, and one must learn through experience how to navigate them successfully. For challenges like this, leaders benefit most from the support and guidance of senior mentors. Especially helpful are mentors who are insiders to the field, because they can draw upon the lessons learned through their own experiences to offer wise advice to leaders facing similar challenges for the first time.

Operational Support

Some leaders outlined a practical need for administrative support. “I’m fighting to have a PA. And it’s not in the budget and everyone’s like, ‘Oh, it’s not a priority.’ And I’m like, ‘I understand it’s not a priority, but [consider what is lost if I’m] doing my own scheduling and [handling] IT [instead of] developing what this community needs on the larger scale.’” This seems to be a common challenge for many leaders. One possible option to help address this need would be establish a system for leaders who do not have the means to hire staff independently to share the salary expense among several organizations. This would not only allow leaders to dedicate more time to their missions; it would also create appealing opportunities for early career Jewish professionals to gain professional experience while working closely with senior leaders and benefiting from their mentorship.

Burnout

The everyday challenges leaders face when accepting leadership positions can be intense and the pace may not seem to ever slow down. Furthermore, leaders who are seen as singly responsible for a program or a community may feel countless demands upon their time and attention. “And I know that for many of my friends who are in the rabbinate, it’s the same story, like sort of the expectation that you’ve got to do it all. And it’s not a very wise expectation. It’s very challenging to do it all.” The pressure to rise to the occasion and meet every expectation placed upon them in their role can cause leaders to feel that they have no choice but to exert themselves: “it was sink or swim and do it all, because no one’s going to do it for you.”

Consultation with senior mentors can help leaders realize that even if the leader’s assessment of the volume of their work is accurate, it is nevertheless imperative to find a healthy balance of work and personal life to avoid burnout. As one leader reflected, “I think the first couple of years [in my role]... were so trying that if I had not had that network and those coaches and mentors, I’m not sure – you know, I’m not sure where I – like that I would have been able to stick it.” At this career phase, personal networks are also vital because they can provide support and emotional connections that help leaders maintain a connection to life beyond their work.

Collegial Relationships and Role Clarity

Healthy work relationships are also critical. A factor to reduce burnout and turnover is for school heads to feel that they will be supported by their board and given appropriate autonomy to carry out their role.

“I think specifically if someone was looking at a headship, I would say looking very carefully at the lay leadership, at the board, at the board chair, sort of what stage the board is in, in terms of understanding their role, as opposed to other people’s role. Like as opposed to what’s not their role, how they see themselves... I think that that is a really important piece.”

However, day school boards may be challenged to carry out their duties while simultaneously providing leadership development for new members. “[Among parents,] Jewish day schools are often people’s first lay leadership role. [In my experience,] the board itself had a little bit of an onboarding program, but not very much, and certainly their interest was not in helping me acquire lay leadership skills broadly.” Another interviewee had a much more impactful experience of lay leadership development:

“I learned how to be prepared for running meetings on subjects that I really wasn’t deeply knowledgeable about, how to get prepared, and how to build good teams, both with executive committee members and then with the general board, and how to figure out how

to delegate work effectively and how to decide what's important, how to decide what was the layperson's job and what was the staff member's job. All those are important skills when learning to run a board, particularly in the Jewish community. I mean, in any board, but particularly learning that separation of powers in the Jewish world is really important if you're going to be successful."

Leadership development for first-time lay leaders should be noted as a potential inflection point. The downstream benefits of integrating leadership development into onboarding for new board members could include reduced burnout for school leadership, and, consequently, more excellent schools. At the same time, there could be upstream benefits as well. While the experience of serving as a board member may be a person's first leadership role, it may not be their last. A positive first experience as a board member can be an onramp to supporting the community through future leadership roles:

"When someone is taking on a leadership role, that's very clearly an identifiable moment and the person is clearly identified, whereas [a focus on supporting early career professionals requires you] to make bets on who are the talented people that we could attract into this career. Or if we don't attract them into a career, the payback may well be they'll take on lay leadership responsibilities in an effective way, so it'll be a career in a different sense. We need more people to take on professional leadership roles in the Jewish community, but it isn't failure if they choose another career and then contribute as a volunteer."

There is a cascading effect at play that points to lay leadership development as a strategic lever with the potential to create positive system change for Jewish education. The benefits of board development can also ripple outward as board members apply their leadership learning in other Jewish organizations and community settings.

Imposter Syndrome

The discrepancy between the leader's work goals and their accomplishments can create inner tension. Unrealistic expectations can exacerbate burnout: "[rabbi salaries are] too high [and] the rabbis internalize guilt around that, and the lay leadership as donors expect the performance and the commitment and the time on task of a CEO, you know, of a large multinational company." Situations like this are difficult to manage because they not only exhaust the leader, but they can also be demoralizing experiences that cause self-doubt.

Until leaders learn to become comfortable in leadership positions, it can be a challenge to work through imposter syndrome and develop realistic self-awareness of their strengths and developmental needs. In the face of challenges, abundant opportunities to learn from failures, and the scope of ambitious missions, leaders may feel intimidated and humble: "who am I to lead this thing? I don't have enough—I don't know organizational development, I don't know executive education, I don't know leadership, I'm not a leader." Many leaders described the feeling of self-doubt as a significant challenge for leaders to overcome. "I have challenges every day. The biggest challenge in my career—well, I mean, to be perfectly honest I think the biggest challenge I've overcome, and it took a while... was the impostor syndrome... I think lots of people have that, frankly, and they never talk about it."

What we heard about how Jewish leaders can overcome imposter syndrome is that support can be found in several types of relationships. Personal networks are important, but so are respected mentors, particularly when leaders are distressed by a significant failure.

"In that instance, I would say the despair was very, very long lasting, to the degree that I actually thought I would go [into another profession, but] it was someone else's belief in me, someone specific, who basically said, "You don't have to do it this way. What about this idea?" And I think when someone else believes in you, then that does change things. That does help you."

Just as at career onramps, leaders challenged by imposter syndrome can receive powerful support from someone who expresses sincere concern, wise guidance, and a word of encouragement.

Prestige

Leaders may struggle to overcome imposter syndrome several times over the course of their careers. However, the first time may be the most difficult, and external validation can provide support while also giving leaders the courage to continue taking risks and challenging themselves. What we often heard was that leaders in this phase were beneficiaries of an honor, exclusive fellowship, or received funding that allowed them to pursue additional learning opportunities or launch an experimental new program.

Prestige is a valuable asset that can convey significant real-world benefits and smooth the way for a leader's developmental progress. We often heard that gaining prestige opened doors for leaders to gain recognition in their field and advance in their careers.

"When did I actually become considered a leader in this field? I don't know. I do know having the letters after my name, Ph.D. does help. I was not any smarter the day that I graduated. I mean, the first four years of accumulating knowledge, yes... But as soon as I got the Ph.D. people started calling me. And I think that's a good thing and a problematic part of the equation, but it is a reality. Early in my trajectory if I wanted to go as far as I wanted to go... the credentialing was important."

Other leaders spoke about the social capital they gained from the "stamp" of being a Wexner or Schusterman Fellow as a benefit distinct from their personal development and learning while in the program. The "stamp" effect is similar to formal credentialing in the way that it marks a measurable moment of transition after which a leader is perceived as substantially more qualified for leadership positions than they were the moment before.

Confidence

In sociological terms, prestigious programs and awards can function as rites of passage, or rituals that mark a fundamental change in an individual's social role and status. They have the potential to be used as image-making techniques to create change in a person's social reality. At the same time, events like these allow a leader to internally "reimagine (and redirect or reorient) themselves," which can be a significant turning point in a leader's life. The combined effect of formal leadership development assessments and training, an increase in social prestige helps leaders to build confidence and leadership capability at the same time, and can provide the boost needed to advance to the next phase of their career.

Summary: Leadership Positions

Entering a leadership role entails new responsibilities. Leaders may need to manage a team for the first time, create a budget, raise funds, etc.

- TRAINING early in this phase should provide necessary managerial, business, or technical skills to allow leaders to gain the knowledge or abilities needed to succeed in their role and appropriately support others.
- Over time, they will face challenges that are complex or do not have textbook solutions. Learning to navigate these challenges only comes from experience and often involves failures.
- MENTORSHIP NETWORKS: Leaders in this phase acquire a deeper understanding of their field and its nuances through the guidance of senior mentors. Mentors provide personal guidance, encouragement, and emotional support. Especially critical is the support of mentors who prioritize the interests of the individual

over their role or organization.

- Constant struggle with highly demanding work and frequent failures helps leaders to gain self-awareness, particularly as they recognize their shortcomings. They can be supported by encouragement and by helping them to acknowledge their strengths and gain the confidence to stretch further.
- **CONFIDENCE & PRESTIGE:** The affirmation of receiving a prestigious fellowship, award, or program helps leaders develop confidence. Leaders learn how to communicate a bold vision. These skills prepare them to take on more ambitious leadership roles. The social capital gained from credentialing or the “stamp” of a prestigious program opens doors to promotions, funding, or other needed support.
- **COHORT & ALUMNI NETWORK:** Programs and fellowships for leaders in this phase should include cohort experiences because leaders need a supportive community of peers who see each other for who they are while offering sincere support and guidance to each other. Leaders mutually uplift one another and stand together in solidarity through difficult challenges.

Recognition: Leadership in the Spotlight

At this phase, leaders have gained broader recognition in their community or field because of prior accomplishments, fellowships, or visionary leadership activities. Leaders continue to exert themselves for the sake of their work and may face even greater challenges than before. They continue to experience tension between a sense of imperative to continuously meet the needs of an inspiring mission and their personal limits. Just as in the previous career phase, burnout is a danger—or a persistent reality to be managed as much as possible—and achieving a healthy work-life balance remains a challenge.

The challenges and avenues for support in this phase are outwardly similar to those of the previous career phase, but what makes this phase more challenging is that leaders must learn to work and grow through their mistakes while feeling as though they are in the spotlight. The increased attention may be helpful in their work, but being seen as larger than life can trigger a return of imposter syndrome.

Self-Recognition

Even more significant than the challenge of public recognition is that leaders in this phase gain greater awareness of the social context of their leadership as well as the self-awareness needed to recognize themselves as leaders. Leaders may be surprised to discover that their role as a leader has fully integrated with their personal identity. This discovery comes to light in the relational contexts of professional networks.

“And that case became even more powerful for me, because I reached out to [potential partners who] then turned back to me and said, “We trust you. We rely on you. We can’t do it. Can you help us out?” So that was more like, okay, when other people are actually asking you to do it, then you realize it really is you to be in that role.”

Achieving this level of self-recognition can be complicated; leaders have to come to terms with a polarity of humility and appropriate appraisal of themselves to acknowledge the reality of their social position as a leader.

“There’s always this tension, I think, with leadership in general about humility versus ego and I think it’s a clear tension but the humility of being able to say, “It’s not about me and it wasn’t all because of me,” needs to be juxtaposed, “Well, if it wasn’t for me, then it might not have got done.” Now I didn’t need to tell the whole world that—I didn’t need recognition for that, but surely it doesn’t go unnoticed.

That's not why you do things but there's a certain amount of healthy ego involved in saying you are the one and recognizing you've got that responsibility, as well, otherwise you'd leave it for somebody else to do."

As leaders recognize their own developmental progress and potential they may also be aware that they might soon be seen as candidates for senior or executive leadership roles.

Coaching

Just as it is true that technical skills can be easier to learn once a leader accepts a leadership position and faces an immediate need to learn them, the spotlight of being in a public leadership role can make a leader's developmental needs more visible—sometimes by way of abundant feedback. Leaders who have learned to extract as much value as possible from failures will find that remaining open to the potential merit of criticism can provide worthwhile insights into which leadership skills are most in need of further development. We heard from many leaders that working with a professional coach offered the unique benefit of allowing leaders to develop a personalized development plan and receive continuous feedback from an expert over time as they put it into practice.

"There are a certain number of core things [for a leadership program to teach] that's standard stuff that you can and should deliver and it's good to have acquired, as well as simply sort of learning adaptive leadership type skills as well. But beyond that, I think people are sort of wanting to meet their own needs and therefore coaching is a more customized version of that."

Additional Leadership Development Programs

Being in a position of leadership and needing to address developmental challenges is no longer a novel situation for leaders in this phase. The ability to reflect upon the lessons of their own lived leadership experiences puts leaders in this phase in a better position to leverage formal leadership development training programs as opportunities to practice and refine their skills. "I feel like I have probably implemented 15% of the things that I have learned over the course of [several prior leadership development program experiences], mostly because you know, you get back and you start doing your work."

Leadership development programs designed for leaders in this phase offer training in skills that are likely to be shared needs within the group. For example, exercising leadership in a more public role can present unfamiliar challenges, such as the need to learn how to develop and communicate a compelling vision. When a leader becomes the public face for their organization's mission, they may find that their public persona has become entangled with their role as a fundraiser supporting the organization's mission.

"[I think the most rewarding thing is] when we get to support people who have vision, who are doing the work and putting their heart and soul into it and being able to look at them say, "I believe in you. I believe in you so much that I'm going to fund what you're doing to make it that much easier on you," even though it's not much; they still have to go out and do it. I think that that's the most rewarding part of the work."

The importance of learning how to navigate difficult or complicated relationships with funders and other stakeholders was also a common theme in the interviews, and could be a worthwhile focus for leadership development programs. Relationships with funders can be especially challenging because of the unavoidable power imbalance in the relationship. Because of the power imbalance, feedback and recommendations that come from a funder might be received with mixed feelings. Even if a recommendation is insightful and entirely appropriate, acting upon it could be misinterpreted as a signal inviting more input or involvement and erode the organization's autonomy. This remains the case even if the funder does not actively fund a

leader's organization because it is impossible to ignore the subtext of funding as a future possibility.

Operational partnerships with a funder can also be challenging. A funder may not have to be attendant to the same concerns as the nonprofit partner, or they may not be subject to the same constraints. In the event that the partners differ on a matter, the power imbalance can make the nonprofit partner anxious that their view does not have an equal chance of prevailing. Some leaders expressed concern that if a funder were to continue a project independently after a partnership fell apart, it could lead to a competitive situation that causes detriment to the nonprofit. Learning how to be politically savvy and navigate complicated relationships skillfully is a universal need, but it is especially critical for leaders in this phase.

Supportive Peer Cohort

A practical program to gain skills is beneficial, but what helps leaders with a public profile to overcome imposter syndrome is being seen and related to on personal level by other leaders. When asked about what was most beneficial about the programs that our interviewees had participated in, the overwhelming majority responded that it was the opportunity a cohort-based program creates for leaders to connect with a network of leaders who remain in contact after the program and offer each other high quality guidance through peer mentorship, and support. As one of our interviewees said, "if you really want to learn and grow, you've got to do it with others." As a professional network, the cohort can also exchange information, share career opportunities, and provide a personal foundation for organizational partnerships.

Summary: Recognition

The feeling of being in the spotlight (or being seen as larger than life) can trigger imposter syndrome. Previously developed relationships often go deeper as leaders navigate more complex leadership challenges.

- **SUPPORT NETWORKS:** Leaders in this phase have probably already benefitted from mentor networks to learn how to navigate the field; those mentors can continue to provide guidance and support as leaders face difficult challenges. Family and friends can also be valuable support networks.
- The work load may be extremely large and leaders still experience the pressure to "do it all." The risk of burnout remains high, either due to overcompensation for imposter syndrome or because a work objective is ambitious in scope but lacking adequate support.
- **WORK-LIFE BALANCE:** Even if the leader seems indispensable to the work, they may nevertheless need to take time off or set aside time for restorative practices to establish a sustainable work-life balance.
- **COACHING** can focus on development needed for success in this role and on preparing for candidacy and advancement to a senior or executive role.
- **FORMAL LD PROGRAMS** (often not their first) provide fresh insights or a chance to focus again on leadership development after having had experiences that provided the perspective needed to get more out of the training.
- **COHORTS** that form through leadership programs can create a community of leaders who support each

The Benefits of Formal Programs

(Thematic summary of open-ended survey responses)

Program Benefit	Freq.
Network	20
Leadership Development	11
Prestige	6
Mentorship	6
Confidence	4
Jewish Learning	4
Career onramp	4
Space to reflect	4
Learning ways of thinking	4
Cohort	3
Scholarship Funding	3
Business skills	2
Coaching	2
New Ideas	2
Professional Development	2
Pluralism	2
Self Awareness	2
Work life balance	2
Adaptive Leadership	1
Design Thinking	1
Equity, Diversity and Inclusion	1
Feeling Supported	1

other and provide a valuable opportunity for peer mentorship.

Advancement: Transition to a Senior Executive Role

When leaders advance to senior and executive positions, they immediately face two challenges. The transition itself is a change that can profoundly affect the culture of an organization. By merely accepting the position, an incoming CEO immediately creates a leadership challenge that will need to be resolved through a skillfully orchestrated demonstration of change management. Leaders can be supported before and during their transition into an executive role through training that focuses on how to adapt to change and how to guide a community through change.

Coaching

The incoming executive leader will also face unanticipated challenges that may be impossible to fully grasp before actually stepping into the role. “[Working closely with a CEO] doesn’t really train you to be in this position. Because you don’t go to sleep with those responsibilities and you’re not looking at the broad complexity. You’re looking at the narrow piece that you see and that’s being shared with you.” Feeling total responsibility for the success of a school, congregation, or organization may be so profoundly significant that leaders will need time to reflect on what the responsibility means to them personally. Working with a coach can help leaders as they consider their leadership priorities, vision, and needs in the course of an executive transition.

“Working with someone was really, really helpful because I don’t think—it’s not short-term work and I think the level of issues when you get to a certain amount of experience or seniority become very different and particularly when you have a larger team on your hands. Working individually with someone that was private, between us and, to some level [help to understand] your personal vision... [My coach] helped me clarify why am I here personally? What is it I want to do? What’s the kind of person I want to be? What’s the kind of leader I want to be in this space? How do I want to manage my team? All of those things.”

Leaders in this phase will face challenges that are unique to their individual role and circumstance. The coaching relationship is beneficial because the developmental agenda can be personalized. Leaders saw this as essential; as an experienced leader, you will have “your own personal leadership questions, issues, journey.”

We observed a trend in our interviews that suggests that Jewish leaders entering executive roles can benefit more by working with a coach who is not a community insider “because everyone knows each other and we all—it’s a small, little world... it was good to kind of be outside this world. And it was totally anonymous in that way.”

Privacy was often mentioned as an essential element in leadership development for executive leaders. It is reasonable to assume that this would be especially true for an incoming CEO, whose personal insecurities, if expressed outwardly, might negatively affect perceptions of the organization or shake the confidence of staff.

New CEO Cohort

In our interviews, we heard leaders describe in varying terms the loneliness inherent to the executive position, the categorical distinction between the leadership as the chief executive and other leadership roles, or the necessary separation between the executive and other organizational staff.

“Coming into this role is like also just a huge transition, right? A huge inflection point of thinking you know how to lead and then being in the leader seat and realizing you really don’t know what it means until you’re in that seat.” Since executives face pressures and challenges that can only another executive can fully relate to, a cohort of other CEOs is a unique strategy that allows CEOs to learn together and ask for or offer advice confidentially among a small community of peers.

“The CEO Leading Edge Program is different because part of the magic of that program is that we’ve developed this incredibly tight cohort of—you know, there are things that we discuss there that you’d never discuss with the rest of the people that work in your organization. So I feel like the way that works makes sense, you know, for CEO leadership.”

Delegating

The increased scope of the executive role carries with it final responsibility for every aspect of an organization’s operation, including a variety of needs with which the CEO has no prior experience.

“It’s a challenge on so many levels. It’s a challenge being at the top and having my name on the door, and ultimately I’m responsible for and accountable to everyone and everything. You know, clients are challenging, staff, employees, you know, finding the right people, keeping the right people. Just really running the business on a day-to-day basis.”

The experience of many CEOs is that “within the first six months on the job, you’ll discover that your knowledge and skills, no matter how great, are inadequate for the requirements of the job.” Attempting to navigate the unfamiliar while keeping on top of everything else can quickly lead to burnout. “Typically, most GMs reach a point of being overwhelmed and paralyzed, usually in the third, fourth, or fifth month on the job”

Leaders we interviewed talked about arriving at the conclusion that “doing it all” in such a role would be impossible. “That was a big moment. So, it was kind of like a you could step back and just call that, like, an asking for help or something; of realizing that you can’t do it all alone.” What they learned is that that the only way to succeed as an executive is to become skilled at delegating responsibility. It is therefore critically “important to recruit and rely upon an exceptional team whose skills can support where you need help.” Executive leaders must first be highly effective team leaders, and can augment their own capacity by cultivating teams of leaders with diverse and complementary abilities.

In one interview, we received a word of advice that leaders should keep in mind while adjusting to the realities of the executive role: “Understand the people you delegate to will not do as you tell them. But as long as what they do is good, and it gets the organization to where you need, give them leeway. It’s hard, but you have to do it to be a leader.”

Desk Fatigue

Several of the leaders we interviewed described experiencing a type of burnout as a result of advancing to a leadership position that shifted them away from the front lines of carrying out an organization's mission and into an administrative role. New CEOs and other leaders who enter administrative roles may benefit from the simple advice we heard about how to combat desk fatigue: make time for yourself to occasionally get out from behind the desk and immerse yourself in the direct engagement work that first inspired your decision to embark upon a career in the Jewish education or nonprofit sector.

Summary: Advancement

A great deal of research has already described the challenges of advancing to executive leadership. In our interviews a few themes stood out:

CHANGE LEADERSHIP: The transition is difficult from the beginning because it includes the need to provide leadership through a change affecting the entire organization

- **COACH:** A new CEO may have often faced impostor syndrome before, but feel new anxieties (sometimes reasonable concerns) about their skills relative to the responsibilities of the position. A professional coach can provide a personalized program of development to address those concerns. Leaders in this phase already know the field, so an “outsider” coach focusing on skill development is often preferable to an “insider” mentor
- **COHORT:** “It’s lonely at the top”; CEOs benefit from discussing the unique challenges of the position within a trusted cohort of other executives going through a similar transition because it may not be prudent to discuss those issues with staff, funders, or partner orgs.
- **DELEGATING:** It is a challenge to accept one’s distance from the work. There is far too much to do everything on your own (as leaders often have to in startup orgs/projects) so it is necessary to delegate. Others will not do what you tell them to do, but you must still accept that the work has to be entrusted to them.
- **DESK FATIGUE:** The executive may experience burnout from administrative duties and separation from the meaningful work that inspired them throughout their career. Inspiration might be restored by taking time to engage directly with beneficiaries

Conclusion and Next Steps

The aim of this report was to synthesize key elements of Jewish leaders of Jewish learning experiences (broadly defined). Through the in-depth stories we heard from 83 leaders, we identified both key phases of the leadership journey and interpreted experiences for Jewish leaders in the framework of the original Lessons of Experience study. This information provides value opportunity for reflection on overall leadership journeys and examination of inflection points where strategic investment could make a measurable difference in the Jewish leadership pipeline and overall Jewish leadership culture.

The next phase of the study is to leverage this data, the previous literature review and dialogue, and feedback from the foundation and research advisory council into a capstone report that aligns with the foundation’s strategic roadmap and brings in leadership development best practices to inform future investment in catalytic leadership development to drive the future of the Jewish social sector.