

# LEARNING LEADERSHIP AND FACING CHALLENGES

*Part Two of CCL's Cross-Portfolio Research Study*



*Prepared for the*  
**JIM JOSEPH FOUNDATION**

*October, 2019*

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## Table of Contents

REPORT SUMMARY.....	4
SUMMARY OF KEY FINDINGS FOR FIVE CAREER PHASES.....	5
LEARNING OBJECTIVES .....	12
OVERVIEW OF RESEARCH METHODS.....	12
Preprofessional Journeys.....	15
<i>Parents and Family</i> .....	17
<i>Attending Jewish Day School</i> .....	18
<i>Jewish Community Participation and Youth Groups</i> .....	19
<i>Camping</i> .....	20
<i>College</i> .....	24
<i>Israel Experience</i> .....	25
<i>Designing Jewish Journeys</i> .....	27
Career Journeys.....	30
<i>Onramps: Beginning a Career</i> .....	31
<i>Early Career: Professional Development</i> .....	34
<i>Leadership Positions: New Responsibilities</i> .....	37
<i>Recognition: Leadership in the Spotlight</i> .....	42
<i>Advancement: Transition to a Senior Executive Role</i> .....	44
Conclusion and Next Steps.....	48
APPENDIX 1: The 83 Jewish Leaders Interviewed.....	49
APPENDIX 2: Interview Protocol.....	51
APPENDIX 3: Qualitative Coding Manual.....	52
APPENDIX 4: Machine Coding Labels and Search Terms.....	57
APPENDIX 5: Nine Virtual “Conversations” in the Interviews.....	58
APPENDIX 6: Interview Follow-Up Survey.....	59
APPENDIX 7: Notes on Challenging Terminology.....	63
ACKNOWLEDGEMENTS & EDITORIAL NOTES.....	66
BIBLIOGRAPHY.....	67
ENDNOTES.....	71

## REPORT SUMMARY

This document is the second in a series of reports generated by a multi-year cross-portfolio study of the Jim Joseph Foundation's investment in leadership development in the Jewish social sector, specifically Jewish learning experiences. It is preceded by a literature review, which was summarized and presented in dialogue with key Jewish leaders in a series of blog posts. It will be followed, in the Spring of 2020, by a document that synthesizes the bigger picture of the future of leadership development for Jewish learning experiences in the Jewish social sector by combining the information from the first report, this report, feedback from the Foundation and advisory committee, and integration of best practices in leadership development. This document focuses extensively on a key method of the cross-portfolio research study: the lessons of experience style interviews. Building on a method pioneered by CCL researchers in which leaders were asked life-story interview questions to understand their leadership development journeys, the aim of this portion of the study is to understand and describe the critical inflection points for Jewish social sector leaders.

The pages that follow present a thematic analysis and in-depth exploration of the themes that emerged from the interviews to explore the key phases in the journeys reported by our 83 interview participants. We utilized the original Lessons of Experience (LoE) analysis framework to analyze these themes, as well as identified additional themes unique to this study. We also surveyed interview participants to provide additional context for their journeys.

A key finding was that Jewish leaders' careers can be supported in specific ways at five key junctures. These five career phases do not necessarily represent a linear career path, but are abstract representations of the contexts or inflection points at which support was critical and helped leaders to further develop their leadership skills. Below, we explore these phases and the role of various types of supportive interventions.

## SUMMARY OF KEY FINDINGS ABOUT PREPROFESSIONAL EXPERIENCES

- Early leadership learning experiences often set the stage for continued value-driven leadership later in life.
- Leadership journeys begin in parallel with Jewish journeys that provide a firm grounding in knowledge of Jewish texts and traditions. That foundational knowledge helps leaders to develop confidence to see themselves (and be seen by others) as a Jewish leader or educator.
- Influential youth experiences were overwhelmingly traditional experiences provided by established Jewish institutions. The primary concerns we heard relate to program accessibility and affordability. Preprofessional developmental programs can be supported through sponsorship to increase availability and reduce costs, recognition, and opportunities for groups from different communities to meet and work together.
- Young leaders may benefit from formal training in boundary spanning practices and how to mobilize effective community responses to crises such as human rights abuses, humanitarian crises, or public tragedies.
- The most influential programs provided prolonged immersive experiences with a social cohort element. In those contexts, young leaders gain leadership experience through frequent opportunities to take on challenging assignments and experiment in a low-risk environment in which failures are accepted and remembered as productive learning experiences. Youth groups and camping experiences stood out for integrating these features.

## SUMMARY OF KEY FINDINGS FOR FIVE CAREER PHASES

### 1. Onramps: Beginning a Career

- SOMEONE BELIEVED IN ME and encouraged me to accept a challenging leadership assignment

### 2. Early Career: Professional Development

- 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.

### 3. Leadership Positions: New Responsibilities

*Entering a leadership role entails new responsibilities.*

- 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 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.

#### 4. Recognition: Leadership in the Spotlight

*The feeling of being in the spotlight (or being seen as larger than life) can trigger imposter syndrome.*

- **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 other and provide a valuable opportunity for peer mentorship.

## 5. Advancement: Transition to a Senior Executive Role

*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”; CEO’s 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

### *Summary of Findings From Follow Up Survey*

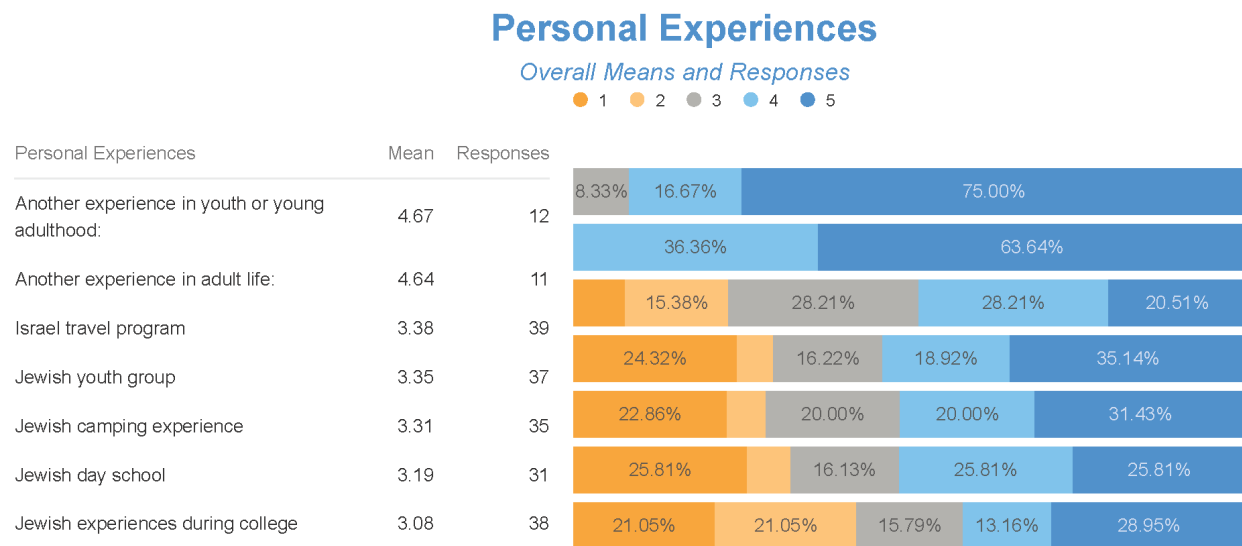
While the aforementioned themes emerged from the group coding work, we also wanted to learn more specifically about interviewees’ perspectives on their experiences as understood through the LoE interpretive framework. This framework looks at the influence of key developmental experiences across several categories. We followed-up with interview participants to ask them to specifically rank experiences within these categories in terms of their influence. Fifty two of the 83 interviewees responded to this additional data request, representing a 63% response rate. This complemented their interviews while also providing us with a bigger picture of experiences that shaped their leadership journey. Specifically, they rated experiences in the following domains: personal experiences, challenging assignments, developmental relationships, and adverse situations. The charts below provide a quantitative overview of interviewee rankings, and we explore each in depth in the remainder of the report.

The response mean and total number of individuals responding to each question is provided to the left of the chart. The color-coded responses indicate the distribution of responses to each item.

## “How influential has the experience been for your development as a leader?”

Please indicate the influence of each item below.

Select 1 for “not influential” and 5 for “very influential.” (Leave items blank if you have not had the experience.)

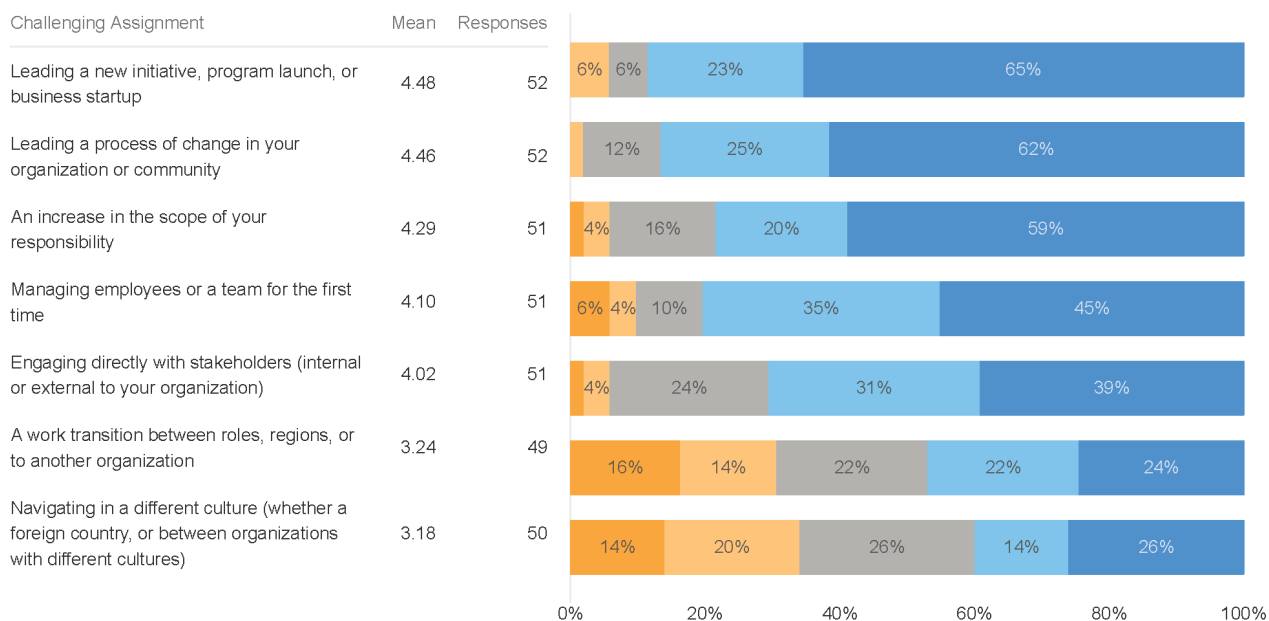


Of those experiences ranked by more than half of the participants, the most influential personal experiences were Jewish youth groups, camping experiences, and day school experiences. For those listing other experiences in adult life (N=11) common experiences referenced family, parenting, and spousal relationships.

## Challenging Assignments

Overall means and responses

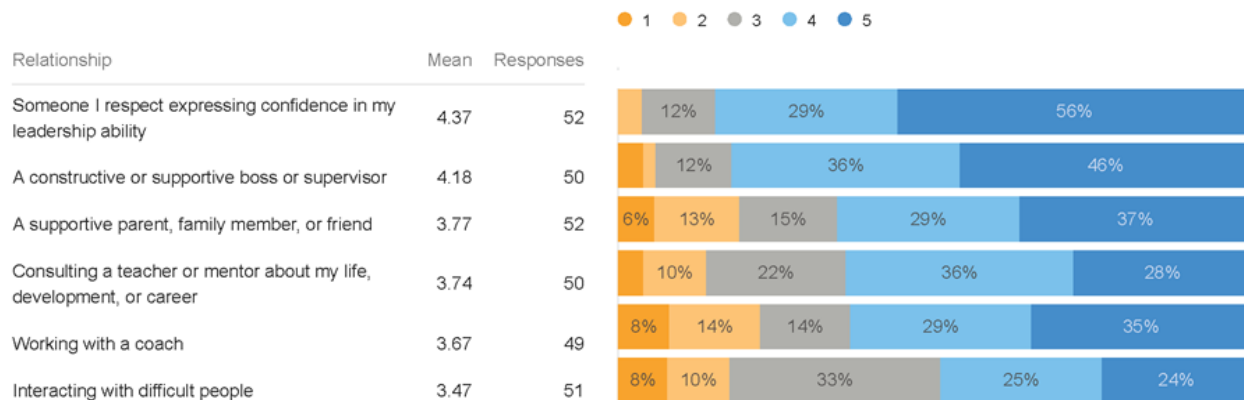
● 1 ● 2 ● 3 ● 4 ● 5



The 70-20-10 model of leadership development suggests that leadership development primarily occurs through challenging assignments (70%), developmental relationships (20%), and coursework/training (10%). For our interview participants, the most influential challenging experiences involved on-the-job responsibilities for leading new initiatives or change processes, followed by direct management of others and other increases in responsibility. Transitions in work or navigating different cultures were influential, but not as much as the other experiences.

## Developmental Relationships

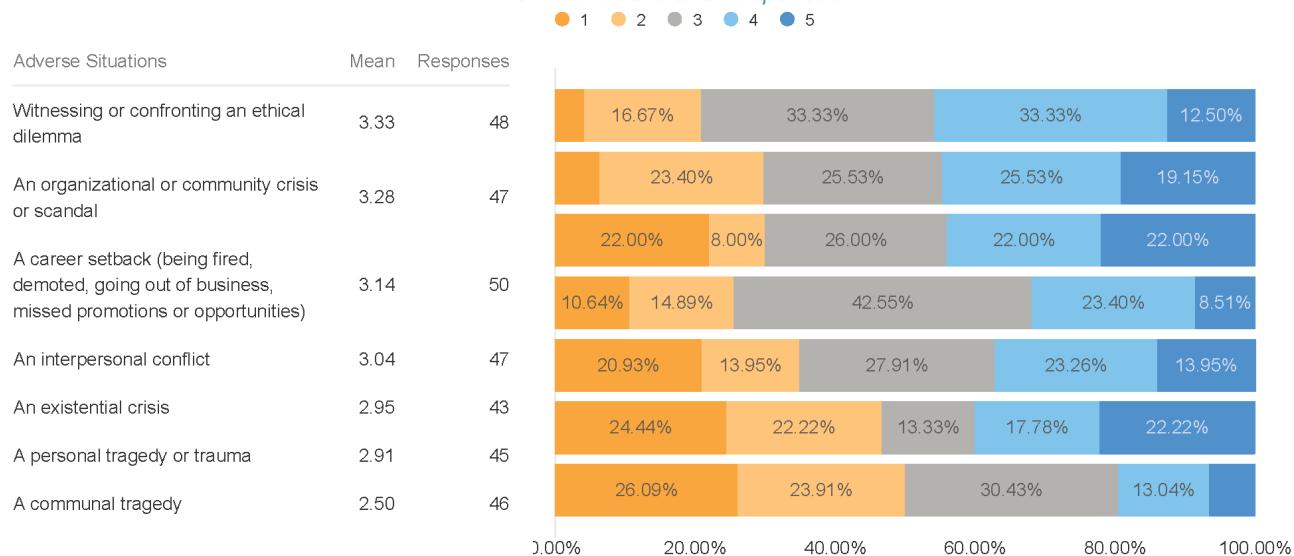
Overall means and responses



In terms of developmental relationships, having another person express confidence in the leader's ability was the most influential relationship, followed closely by having a constructive boss or supervisor.

## Adverse Situations

Overall Means and Responses



By comparison, adverse situations were ranked lower in overall influence for the leaders who responded to our survey. Confronting an ethical dilemma, navigating an organizational crisis, and experiencing a career setback were ranked most influential.

In the remainder of the report we delve deeper into each of these categories of experiences to better understand what was influential about each of them and how they helped shape leader development. We combine the types of experiences explored above with the 5 career phases to understand the interplay between the two. In each phase, different experiences can hold critical developmental relevance. Throughout the report, we incorporate direct quotes from the interview participants to provide further context for each section.



## 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.” As such, JJF commissioned the Center for Creative Leadership to conduct a multi-year cross-portfolio research study to understand the role that leadership development, and their investments in developing leaders, plays in achieving this goal.

The research questions guiding the entire cross-portfolio study are as follows:

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

This report focuses on the first question. The third and final report will further explore the remaining questions and integrate elements of this report and the preceding literature review. Importantly, the third report will be presented in draft form in the Spring of 2020. It will then be used by JJF and CCL to engage leaders in the Jewish social sector around the critical elements, inviting questions, critique, feedback, and suggestions for the future. The Spring report will serve as the basis for interactive engagement in a Summer 2020 convening, with a final deliverable presented to the Foundation in the Fall of 2020.

We interviewed 83 Jewish education and nonprofit leaders to ask about their personal leadership learning journeys, their perspectives on leadership development, and about their concerns and hopes for the field of Jewish education or for the Jewish nonprofit sector more broadly. This report reveals what we learned about their leadership learning journeys and highlights additional trends we observed in their comments about the challenges and opportunities they see for their field.section.

## OVERVIEW OF RESEARCH METHODS

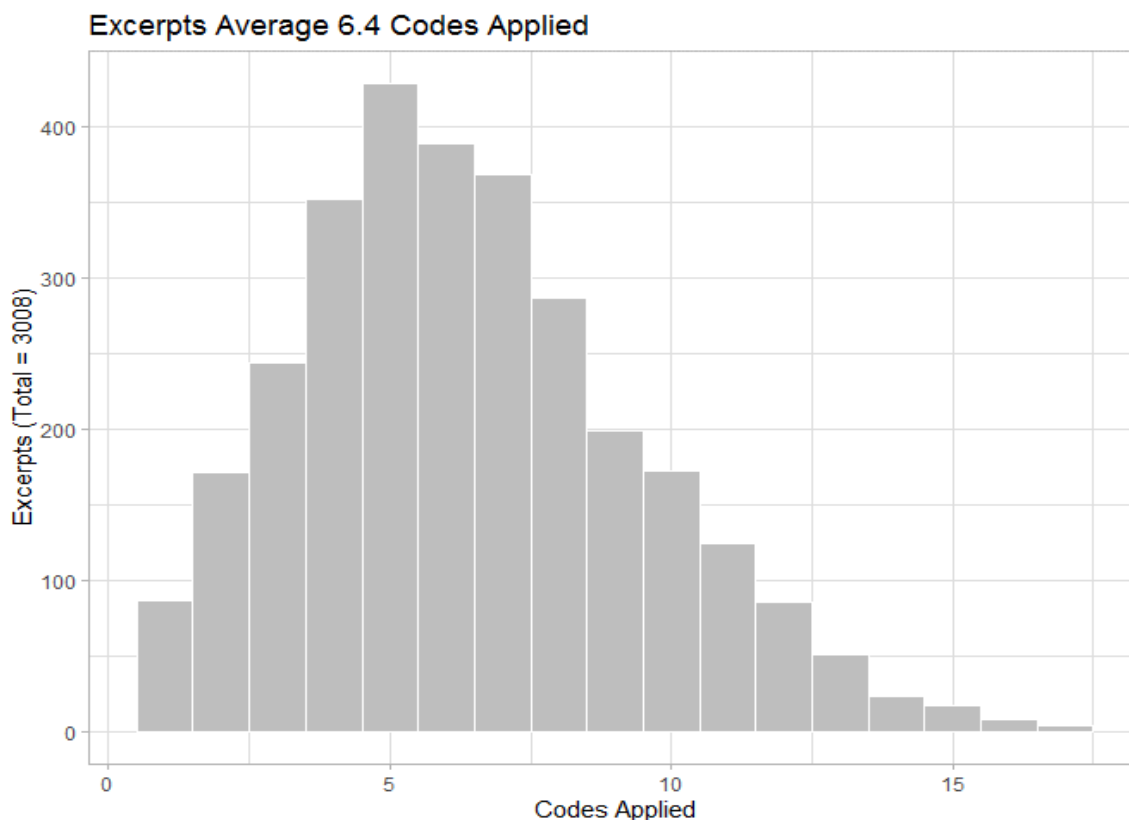
The Lessons of Experience style interview was originally proposed for this study because of its ability to capture the developmental journey of leaders and situate it in the context of their personal, organizational, and societal contexts. CCL researchers pioneered the method in the 1980s and critical insights about leadership inflection points, challenges, and potential derailers became key learnings from the study. The method was replicated in other populations and continues to be generative. For this study, conducting the entire original LoE protocol was outside of the scope and aims. We revised the protocol to retain key elements of the LoE method adapted for this exploration of Jewish leaders. The full protocol, delivered in a semi-structured manner, can be found in Appendix 2.

A list of potential interviewees was developed collaboratively in consultation with the Jim Joseph Foundation and the research advisory committee supporting this study (with representatives from Leading Edge and the Schusterman Foundation). Invitations for a 1-hour virtual interview were sent to potential interviewees. The interviews were conducted via WebEx, recorded, and fully transcribed. Interview participants were asked to recommend additional leaders who they recommended interviewing. This allowed us to build upon our initial list of potential interviewees. Nominations were prioritized for diversity on the following characteristics: gender, race, career-level, sector experience, and denomination. In total, we interviewed 83 leaders in the Jewish social sector. The full list of interviewees can be found in Appendix 1. All interviews were conducted by the primary authors of this report.

## First-Stage Qualitative Coding

The first stage of coding focused on clustering and indexing the volume of data generated by the 83 hour-long interview transcripts. The codebook for the first stage can be found in Appendix 3. The initial codebook was generated and then refined collaboratively by the analysis team. The analysis team expanded to include the secondary authors on this report, who represent different lenses on the topic: leadership development experts, original Lessons of Experience researchers, developmental psychology experts, and qualitative researchers. In order to guarantee the quality of coding and adherence to the codebook, all interview transcripts were double-coded, meaning two researchers read through each transcript and coded, compared their codes, and resolved any disputes. This gives us confidence in our coding process and also allows for immersion in the data for the researchers.

This stage of qualitative coding applied any of 14 codes to over 3000 excerpts. The 14 areas coded covered: formative/developmental stories, professional/work stories, relationships, leadership development, Jewish sector, advice, gender/EDI, polarities, community and identity, education, pipeline, and network. What immediately caught our attention during the qualitative coding process was the fact that topics and themes appeared to be tightly interconnected, sometimes in complex and unexpected ways. We observed that even in relatively short passages, the Jewish leaders we interviewed often shared information that was relevant to several different topics. From the chart below we see that the bulk of our excerpts had between 4 and 8 overlapping codes. We then utilized machine coding and text analytics, building from these codes, to help us further disentangle key themes.



## Machine Coding

In our next stage of coding, we defined a list of topics and search terms relevant to each topic (Appendix 4). A machine coding technique was employed to search the text of interview excerpts we had created in the previous step and label them with a topic code if one or more of its associated search terms was found. This helped us expand our previous coding to include specific relationships (mentors, coaches, etc.), specific experiences (camping, school, travel), and other key elements of their experience. With this machine coding, we were able to look at the overlap of our hand coding with these aspects. This helped us manage the immense amount of coded data and split batches of excerpts up for analysis by the team (e.g. analyzing excerpts related to mentoring and networks, or travel and formative experiences).

## Graph Analysis

We developed a process based upon principles of network analysis to explore the complex interrelationships among topics in the interviews. This process revealed what we termed “virtual conversations,” or discursive patterns weaving through the interviews.

We represented interview excerpts and the codes related to them as connected nodes in a network. After excluding extreme cases (excerpts related to too few or too many codes), we applied the Louvain algorithm to detect community clusters. This algorithm essentially evaluates the network to identify groups of nodes that are more connected to each other than they are to the rest of the network. In social terms, these would be like distinguishing all of the recognizably distinct groups of friends from the background noise of everyone’s friends and acquaintances.

Through this technique, we were able to take the entire set of over 3000 excerpts and identify patterns of textual interrelationships between them. The ‘clusters’ identified from within the network represent textual themes detected through the Louvain community detection algorithm.

Using the statistical programming language “R”, we gathered the community groups of excerpts and converted their combined texts into document-term matrices. The purpose of this step is to consider the excerpts within each cluster and rank how strongly each word contributes toward differentiating each cluster from the rest. In this way, we rank the value of each word’s contribution to making each cluster unique. We then created word clouds to visualize the most differentiating terms for each cluster.

Further analysis is needed, but our hypothesis is that these word groups are suggesting threads of deeper “virtual conversations,” indicating conversation topics that would prevail if the interview texts could engage each other in direct dialogue. This method was experimental in this phase and could produce further insight with guidance around what elements are most important to explore in depth. We are also in the process of incorporating the 9 coded conversations with our previously coded excerpts (completed on a separate software platform) to further explore relationships between the codes.

## LEADERSHIP LEARNING JOURNEYS: LESSONS OF EXPERIENCE

The Center for Creative Leadership has been studying the meaningful inflection points in the developmental journeys of leaders since the publication in 1988 of the landmark study, *The Lessons of Experience: How Successful Executives Develop on the Job*. The study found that successful executives had developed their leadership primarily by learning from five categories of experiences, namely, challenging assignments, developmental relationships, adverse situations, training programs, and personal experiences. In the 30 years since the original research was published, additional studies have extended the Lessons of Experience (LoE) research to understand how leadership learning journeys progress among diverse leader demographics and in a wider range of cultural contexts.


This study draws upon the interpretive framework of the LoE research tradition and extends it to consider how leadership is developed among American Jewish leaders. The five categories defined in the LoE literature tend to be tightly interwoven. This study and earlier research help us understand each type of experience on its own and also identify what elements contribute to making it a more effective means of leadership learning, but it is important to remember that these experiences are connected. For example, what makes developmental relationships especially significant to leadership learning is often the fact that they provide support to leaders while they take on challenging assignments or face adverse situations.

The following sections describe how young Jewish leaders develop, first through preprofessional experiences and later through key career passages – the contexts, events, or experiences that are often inflection points in the professional and developmental trajectories of Jewish leaders.

### Preprofessional Journeys

In our interviews with Jewish leaders, the stories we heard about their leadership learning journeys were often interrelated with stories about their Jewish journeys and life journeys more generally. Some interviewees explicitly distinguished these categories by saying, for example, “I think that for me there’s two different pieces. There’s kind of a Jewish journey and a leader journey, and I think they potentially overlap.” This reveals something significant, because Jewish leaders draw upon their Jewish journeys to enliven the work and inspire the values of Jewish organizations through their own expressions of Jewish authenticity. Therefore any effort to support and encourage leadership journeys for Jewish educators will necessarily depend upon similar support for the Jewish journeys of tomorrow’s education leaders.

*“And I think that you can grow in that; I’m willing to take someone who’s early on that journey. I do believe that leaders can learn their content area. But if I was hiring a manager of a Starbucks, [I wouldn’t want] someone who occasionally has a cup of coffee; I want someone who loves coffee. I want a caffeine addict – for whom this is part of their identity. Because it’s really hard to authentically sell something that you don’t live and breathe.”*

A close-up photograph of a desk. In the foreground, a hand is writing in a spiral notebook with a pencil. The notebook has some faint writing and a small illustration. To the left, there is a small white cloth bag containing several colorful beads. In the background, a wooden pencil holder contains several pens and pencils. The overall scene is warm and focused on learning or writing.

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*Any effort to support and encourage leadership journeys for Jewish educators will necessarily depend upon similar support for the Jewish journeys of tomorrow's education leaders.*

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To consider it in the framework of the Lessons of Experience (LoE) literature, Jewish journeys were by far the most common types of personal experiences related in the interviews. Of the five categories of experiences discussed in previous LoE studies, personal experiences were the least frequently mentioned. In the interviews we conducted, however, personal experiences, especially in the form of Jewish journeys, were often highlighted as critical inflection points in the interviewee's life and leadership development journey. In another departure from the pattern of earlier LoE studies, in which leadership learning was mostly discussed within professional contexts, a large proportion of the personal experiences described in our interviews occurred either in the interviewee's youth or preprofessional years.

When we asked Jewish leaders what events and circumstances in their lives contributed most to their leadership journeys, many responded by describing how important it was for them to develop a strong Jewish identity at a young age. Overwhelmingly, what they described were immersive experiences characterized by sustained engagement over a long period of time. In many cases, these same experiences also provided opportunities for early leadership learning through developmental relationships or challenging assignments through roles in which they were given responsibility for leading a group or project.

### **Parents and Family**

Some interviewees described growing up in a family culture that is deeply invested in Judaism, where Jewish holidays and other practices were observed.

*"I'll give parents credit. I didn't go to long-term – I never really went to Israel. I was not really involved in a youth group. I did a summer camp a couple times, but it wasn't very instrumental. I didn't do any of the things that the data says you're supposed to do in order to become Jewishly-involved. I didn't do any of those things, but my parents, that was very important, right, Judaism was important to us as a family. I grew up in a small town where there wasn't a lot of Jews, but they made Judaism important to us. They created Jewish experiences in our home with pride and with joy."*

One interviewee even described her strong sense of Jewish identity as "inherited" from her parents and connected it directly with intentional ritual practices at family gatherings:

*"Like for me, my expression of my life as a Jew is inseparable from my expression as a woman, as a person, as a mother, like all of it. And I'm confident that's because of how I was raised. My family was—anytime we were together as a family, there was a Jewish ritual involved and that was explicit and designed. Like my parents were transparent about how they designed rituals to make it work for our family, because the two of them chose things and then I inherited it."*

For some interviewees, their family lives and congregation were the only Jewish experiences they had while growing up. "I grew up Jewish and connected Jewishly but not sort of in an institutional way. I grew up in a very small town in a very small Jewish community. So, I didn't grow up with any kind of Judaism beyond like the family and the synagogue. I didn't go to youth group. I didn't go to camp. I didn't go to Hillel. I didn't sort of do any of that stuff."

For others, growing up in a family that was actively involved in Jewish traditions and community life naturally led to a range of Jewish learning experiences throughout childhood. About Jewish identity development, one interviewee remarked that “It’s not the teen program that does it, it’s the family system that goes to JCC or that goes to the museum or that goes to the synagogue that does it.” The implication of this for Jewish education leaders today is that youth development programs should not always be designed with youth as their target audience. Instead, “Jewish education now has to be family [focused] because 72 percent of non-orthodox marriages are outside or beyond the faith. So you’re raising families when you’re doing Jewish education. You can’t just teach children if it doesn’t happen at home.” To an increasing degree, educators may discover that providing Jewish education and experiential programs for parents and families will allow them to impact more young people than designing programs that focus exclusively on engaging young Jews.

### **Attending Jewish Day School**

Many of the people we interviewed expressed opinions or concerns about Jewish day schools, but not as many described personal experiences with day school, and many of those were only in passing. Those who did attend day school as a child talked about it as one aspect of having grown up in a family and community that prioritized Jewish traditions and values and that regularly participated in Jewish community activities. Taken together, those childhood experiences generally translated to a strong sense of Jewish identity later in life. In particular, there was a trend to associate day school experience with developing confidence in Jewish content knowledge. “I did go to day school, but I would say it was not one of the positive [experiences]. I mean, it definitely had its anchors and its rooting, and I wouldn’t know as much as I do [but] it was not my favorite thing about childhood.”

Conversely, it was common for interviewees who said they did not attend day school to mention it in connection with feeling a degree of insecurity about their level of Jewish knowledge.

*“I went to a day school for elementary school, but then went to a public high school, and [I have] a pretty active, engaged, Jewish family. And then getting to college and realizing my Jewish education really stopped in fifth grade and was very stunted. And so, feeling like that was something missing for me. So, that was kind of like that initial piece of, “Oh, I better handle this.””*

In some cases, we heard that a leader grew up without having much involvement with Jewish institutions, without engaging in Jewish learning experiences, or without feeling strongly attached to a personal Jewish identity. Instead, they discovered and embraced their Jewish identity later as a reaction to a social environment in which Jews were a minority.

*“I as a kid did not love Jewish things very much. I didn’t love Jewish social things, didn’t have a great experience at my Jewish school. I tried Jewish summer camp, didn’t love it. I had kind of my own group of friends. Most of them weren’t Jewish and I was just never highly connected. And I actually started to become more intrigued about my Judaism when I was in a non-Jewish high school, where I was really the only Jew. And everyone had a culture, so suddenly I had a culture and that was super interesting.”*

Since our interviewees were asked to describe events that were significant to their development as a leader, it is noteworthy that youth experiences like day school were mentioned at all. What day school experiences seemed to contribute most to leadership development is a feeling of confidence about standing up and being looked to as a leader specifically within a Jewish setting. We see the potential to extend this benefit by adopting the practice that is common in Jewish youth groups and camping experiences of continually providing opportunities for young people to take on leadership responsibilities and organize action in groups. Leadership development education might also be systematically incorporated into day school experiences and curricula to transform school culture at every level.

## Jewish Community Participation and Youth Groups

Leadership can be developed by young people through participation in Jewish community settings, such as attending Synagogue on a regular basis, and being entrusted with a regular responsibility at services, such as reading Torah, leading prayers, or working with children. Through experiences such as these, they learned how to play a role in a group setting and became accustomed to being in front of people. In Synagogues and other community settings, young people can be supported in developing leadership skills by being entrusted with responsibilities such as asking them to hold a ritual object, sing in Hebrew, give a speech, or take responsibility for planning an experience or mentoring younger peers. Through experiences such as these, a young person might have been given hundreds of opportunities to exercise leadership by the time they graduate from high school.

*"I would probably have to point to high school youth group in terms of, you know, leadership leadership. Right? I grew up in a synagogue that was participatory, lay led in terms of the davening. So, you know, I was reading Torah and all of that kind of stuff from, you know, eight, nine years old."*

Youth groups were mentioned as opportunities to interact with others in a space defined by shared values, and participation often provided early experiences with taking initiative, teamwork, and group leadership, for example to organize events or programs.

*"It was all about relationships. I don't think I had the vocabulary at the time to talk about what it means to take a relational approach to leading [but I learned that] you lead by example. You don't lead by standing in front, you lead by standing with. [There was a] culture of pioneering. There were never adults, so it was always—as kids, anything that you want, you create. We were responsible for ourselves. Kids were role models for kids and people took their learning and knowledge very seriously, they took their fun very seriously, they took the world very seriously, they took each other—the sense of community, the value of community... but all of those leadership things, no one ever articulated. It was just lived."*

Another interviewee recalled a similar experience:

*"I grew up in a youth movement when basically the objective or the motto was if you wanted something done, get it done. And you just work with your peers and your friends and I think through osmosis or learning of my former leaders or whatever it was, I just learned how to do things, right? So, it was a youth movement which was really peer-led and leaders at a very young age, so I knew how to do it. So by the time when I was [in my first job], mobilizing to do things became second nature to me."*

Groups like this can help young leaders develop a sense of responsibility for bringing about positive change. The organizing and engagement projects they take on are a way to experience individual agency and build confidence.

*"The synagogue I grew up at connected me to Jewish day school that I ended up at K through 12, and the Jewish day school is how I ended up in Jewish summer camp. And my trajectory through all of that time, pretty much K through, let's call it, 11th grade, was marked by a lot of recognition of my potential, celebration of my contributions, the identification of skill sets that I could offer, and often times being sort of tapped to step up and lead in some way. So I grew up knowing and believing that I was a capable, competent, Jewish leader. And, in many ways, I had a very clear path ahead."*

A persistent theme in the stories we hear about participating in youth activities is how active involvement tends to snowball towards more and greater involvement that can continue into adulthood and lead to a career as a Jewish professional.

*“So I grew up going to a day school and my Jewish identity was pretty solid, through my involvement with BBYO, which then led to an involvement with the JCC where I saw what it meant to be a Jewish professional. And that’s when I was asked as a teen to [accept a leadership role that made me choose this career path]. Like, I love the informal Jewish education piece. I love that people who were there wanted to be Jewish and actively sought out Jewish experiences. And the fact that, people I was hanging hang out with, we were all very similar in our background, so I really appreciated that. So that’s sort of like, for me, something that defined my trajectory of what I knew I wanted to do was through that experience with BBYO. I also think it really changed me personally. I became a much more outgoing person, I became much more of a leader, through those experiences that led me to college to get involved with Hillel and all that other stuff.”*

Another way that youth groups can facilitate leadership development is by being a safe space to try new things in a low risk setting. After being involved in these groups for several years, young leaders become more comfortable with the possibility of failure. Developing this mindset is what enables leaders to learn and grow in response to failures they will inevitably experience rather than derailing.

Youth groups are often sponsored as offshoots of adult organizations, and are more common in areas with large Jewish populations, which points to two important considerations. The first is that youth groups depend upon their sponsor organizations for support, whether financially, for infrastructure, or socially as an avenue for membership. Maintaining the sustainability of sponsor organizations should be remembered as a prerequisite to supporting their contributions to youth development. The second consideration is that the leadership pipeline of American Jews draws from a national ecosystem, and further research should be conducted on how to make developmental programs and experiences accessible to Jews who do not live in cities with large Jewish populations.

## Camping


Many of the leaders we interviewed said that camping experiences were an important part of their Jewish journeys.

“I think that the other is critical in your own Jewish experience, right? But you need to have it anchored and rooted before you can engage the other in knowing who you are, and in deepening and enhancing who you are. For me, like formative experiences, I would say summer camp was one.”

In several accounts, what made camping such a moving experience was the feeling of being part of a community and gaining some knowledge of Judaism in an informal setting. “Somehow I ended up at age 13 at Camp Ramah and it changed my life... It’s there that I experienced the beauty and power of Judaism lived at a living community. And I’ll never forget when I was first being exposed to it. And it touched my heart and soul.” Kids aged ten to fourteen are at a critical stage in their moral development in which they will learn values that will likely guide them for the rest of their lives, and learning those values in a community setting is significant. The camp community was special because it allowed young Jews to experience community

and shared tradition in a group where they could also find diversity and pluralism.

*“What still sticks and resonates [about] summer camp [...] for me it’s very much about community and about the fact that wow, I might meet someone [from] somewhere else in the world and they’re also Jewish and like that kind of started at summer camp where it was Jews from all over and people from Israel and [we all] shared song and dance and tradition.”*

***Epecially important, both in youth settings like camp and in later career phases, was having one’s leadership potential acknowledged through the experience of being recruited or recommended for a leadership role.*** 

Camp offers an immersive experience for an extended period of time with the same groups of campers often coming back together year after year. As a result, campers establish close relationships. In fact, several people told us they are still in touch with their friends from camp, either on an individual basis or as a cohort. This testifies to the effectiveness of the camping experience at combining shared experience and personal social connection to generate a lasting sense of social identity. Like other cohorts, groups of friends from camp can play an important role for professionals later in their career, as a community that extends personal or professional networks, shares advice, and provides support for members facing difficulty.

Camping offers leadership learning opportunities by assigning various responsibilities to campers and by opening a path toward a progression of increasingly challenging assignments. Through their shared lodging and regular responsibilities campers learn to be a part of a community, and as counselors, they learn how to develop and foster community. “[At camp] it’s one thing to sing songs, but it’s another thing to engage people in a tradition, and in prayer, and in ritual in a way that serves meaning to them.”

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*Maintaining the  
sustainability of sponsor  
organizations is a  
prerequisite to supporting  
youth development.*

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The camp setting makes it possible to create formalized leadership roles for a large number of participants. Many people told us that their first leadership role was being a group leader, counselor in training, or counselor at camp. Having held multiple leadership roles from a young age—whether in camp, youth group, or other settings—seems to have led to greater comfort accepting leadership roles later in life and throughout their careers. Those early experiences often proved to be pivotal roles that influenced their future directions.

*“I started to become just really interested in what it meant to [be] a role model and having a hand in raising the next generation of humans and Jewish humans, in particular. And I was just super intrigued by that and also seeing camp as this like fascinating immersive environment where you can really shape people and people can have [...] peak experiences.”*

One element that was often remembered as especially important, both in youth settings like camp and in later career phases, was having one’s leadership potential acknowledged through the experience of being recruited or recommended for a leadership role. “When I was like in middle school I was a color war captain in summer camp and that was like a whole thing because a bunch of peers that are looking up to you, and also the administration’s nod to your leadership capacity.” Leadership roles such as these allow young leaders to take risks and experiment as they develop their personal leadership styles. “There was a spirit and freedom at camp that wasn’t offered in more traditional settings. But in my particular case, I was really invited to exercise leadership in ways that were untraditional and bold for its day, I think.”

*“When I was a counselor in a summer camp... I was invited, prematurely, to become the group leader of an entire age group [...] because, the person who was supposed to do the job, at the last minute backed out. And the director called me and said, “Do you want to do this job?” I mean, it was like weeks before starting. And I said, “Yeah, I’ll take it, but I got to admit it kind of scares the hell out of me.” And he said, “Well, never take a job that doesn’t scare you.” So that was like a really powerful moment, I think, of kind of honoring and encouraging and saying like you want to put yourself out of your comfort zone in order to grow professionally.”*

We heard from several people that camp provided not only a first experience, but a well-defined path through several leadership roles with increasingly greater responsibility. As a result, campers in their early teens may have the awareness of already being on a career path in Jewish education in which they anticipate returning every year, eventually taking on the roles of counselors or division heads as they grow older. “And yes, I ended up going back every summer, getting promoted...And so, all of a sudden, you’re in this like crazy management role at age 23 and realizing that camp was this fascinating phenomenal site of kind of leadership potential and growth... [it’s an] incubator of so many kind of risks, opportunities, challenges.” It was telling that one person explicitly referred to it as a career experience:

*“And, at later points in my camp career, supervising people, helping them get—I look back at the way I supervised 16 years ago and I’m like, “I could have used some pointers,” but gaining ways that I could help younger staff and campers kind of do better at what they do, realize their potential and dreams, and help them do their work better. Those were all formative and leadership/Jewish educational experiences for me.”*

Despite the relative safety of the environment, camp leadership roles were often stretch assignments that helped leaders learn how to exercise effective teamwork and management.

*“My last two summers at the camp were—there was kind of a series of incidents where I was either involved in organizing something, usually not easy dealing with the consequences of decisions that our staff members had made. And it was a very high-emotion, adolescent time. I was 14 or 15 years old. And those moments really gave me I think an initial sense of possibility and allegiance and of*

*the consequences better and worse of leadership of other people's exercising of their leadership. And so I think that's often where my origins for these begins in a telling in those moments as a young camper."*

Camp leadership roles and the perception of a clear path to advancement within the camping experience complicate the question of when a career in Jewish education begins. From the perspective of young campers, the career pipeline at camp is clearly visible every day as they observe the staff at camp and learn their stories. One interviewee remembers thinking as a camper, "first you're at camp, then you go on seminar, then you're a Mador, which is a first-year staff member, then you're a Rosh Edah, and then eventually you're executive director at camp," and intending to follow that trajectory. Future research might explore whether a multi-year experience like camp, in which a process of leadership development and advancement is normalized to the point of being presumed, allows campers to develop greater self-confidence and acceptance of their personal leadership potential. It also serves as a reminder that, if the current pipeline is presumed to be lacking in terms of diversity, that we can look to camp experiences as an early opportunity to expand the pipeline intentionally. Structuring leadership development experiences for campers such that a more diverse group of campers have the opportunity to experience the scaffolded and supportive environment of developing their leadership skills within the camp setting may help bolster the pipeline of emerging leaders.


## College

Some of the leaders we interviewed said that their first leadership experiences were in college. The majority of college leadership experiences that we heard about were related to involvement in Hillel. Through these experiences, leaders developed planning and organizational skills and exercised group leadership. Usually, an important aspect of the experience is learning to create a welcoming shared space and working together with Jews from a variety of different backgrounds.

*"I think really it was being involved in a Hillel as an undergraduate. That's where Jewish leadership began for me... Because I was at a small liberal arts college and we didn't have particularly strong organized leadership there, there was a lot of pressure on students to make Jewish life and make it work. Sometimes I was like, oh, I wish I at was [at a bigger school] where I could have like 15 paid staff serve my every Jewish need, [but] I wouldn't be the leader that I am today if, at 18, 19, 20, 21, 22 years old, if I didn't need to be like how do I build a Jewish community with Reform, Conservative, and Orthodox students? How do I create a community from anti-Zionist to Zionist Jews? How do I keep a kosher kitchen when not everybody in Hillel keeps kosher? How do I invite a speaker? I do I write a thank-you note? How do I write a budget request? Like how do I lead a protest against an anti-Semitic speaker on campus? How do I access the Jewish resources in [my city] to make sure that students are taken care of and supported when anti-Semitic things happen on campus? How do we make sure that despite all the challenges of leadership, that things still remain fun and enjoyable so that people still want to be involved?"*

It makes sense that boundary spanning and working across diversity for shared goals would be particularly important in college leadership. While youth groups often bring together Jews of similar backgrounds based on denomination or location, groups in college are more diverse. Creating a sense of community in which members of diverse groups could find a place to belong was a persistent theme in college leadership experiences.

At the same time, leaders talked about the importance of feeling agency regarding a situation and demonstrating initiative to create change. For some, this included learning how to lead social action activities such as protests, and for others it was by engaging with institutions or student groups on campus.

*Experiences like this can embolden young leaders to continue pursuing Jewish community building and social leadership work in their careers.* 

*“When I was in college is when I started initiating activities that could be described as leadership. You know, I founded an Israel club, and I started a Hebrew group, and those were things that, in my mind, in some ways I was taking a risk by trying to start something. So in my mind, that’s kind of what leadership is. So in college I started doing that. At the time, I didn’t know that I was going to do this kind of work professionally, but I guess it’s where I gravitated.”*

One interviewee talked about being disappointed in the Hillel experience at college, and taking on a leadership role through efforts to improve the situation:

*“When I got to college, I walked into the Hillel and the offering for people like me—strongly identified progressive Jews—was pretty bleak. And...there were two options. [Either] “it’s like that, we’re not going in” or “it’s like that, I could make it better.” So that’s what I did and I helped create an experience that felt like it would be exciting for me and therefore for other people. So that was an interesting moment for me to sort of, I think, with reflection acknowledge “here was something that could be fantastic and what role could I play in making it fantastic” as opposed to being like, “Oh forget it.””*

College holds the distinction of occurring at the boundary between youth and the time when young adults will embark upon their professional lives. College leadership experiences can straddle that boundary in a way that allows young leaders to recognize themselves as adults and their activities as real work, while still experimenting in a relatively low-risk environment where there are often more experienced people who can step in to offer help or guidance if needed.

*“When I was in college, I was active at... the Hillel on campus, actually, so I think my first leadership role was becoming [the] student leader of the... prayer group that meets on campus and, you know, I was, like, nineteen years old and running a service with other nineteen-year-olds, and it was, like, you know, we’re the real deal. It wasn’t a pretend service. It was an actual service with actual ritual skills... By the time I graduated college as a twenty-one-year-old, I had a lot of significant Jewish leadership experience on-campus and that—In many ways because I didn’t want to be a Jewish professional—I was doing that as my volunteer, you know, good citizen work, but it wasn’t really building up my career in my head. But thinking back on it, obviously it played a role in giving me experiences that I was able to translate when I did become a Jewish leader professionally.”*

What seems important in these experiences is the transferability of the skills learned through these experiences into professional life. These leaders learned to recognize their agency, take risks, create inclusive communities, work together in diverse groups, organize events, and mobilize for social action at the same time that they were contemplating their future career options. When experiences like this are supported, they represent early successes that can embolden young leaders to continue pursuing Jewish community building and social leadership work in their careers.

## Israel Experience

In our interviews, we heard about three basic categories of experiences with Israel as important to Jewish journeys or leadership journeys: living or traveling to Israel (often repeatedly) with family while growing up, short trips as a teenager or in college, and gap years or extended time living and often studying in Israel after college. With few exceptions, interviewees who mentioned personal experiences in Israel only mentioned briefly that they considered those experiences formative or critical, but without providing any further explanation. For example, one interviewee said that after growing up in a family with a strong Jewish identity but no institutional ties or habits of ritual practice, “weirdly, we lived in Israel for a year and that was like a really formative experience when we were young, but really not in any of this like communal stuff.”

Other leaders mentioned Israel experiences in passing together with other early experiences: “between 16 and 21, there were tons of those kinds of experiences all within the context of Jewish youth groups and summer camps and teen trips to Israel that gave me the tools I needed to sort of see myself as a Jewish leader and beginning to contemplate devoting my adult professional life to it.” Sometimes, a trip to Israel was linked with the outcomes of additional trips or continued interest in Israel later in life: “I would say that [my camping experience with Ramah] led to me going to Israel my junior year which was probably critical... It led me to want to go back to Israel many times. And I have and do as a result of that. My jobs always sort of had Israel in some sort of tangential way, if not [an] intentional direct way.”

Only one of the leaders we interviewed went into detail about the impact of a trip to Israel as a teenager, however, the description makes it clear that what was most valuable about the experience was the opportunity to make friends while traveling together:

*“My parents wanted me to have like sort of a Jewish friend group or at least Jewish experience, so they signed me up and sent me on a teen trip to Israel. It was six weeks; five weeks in Israel, one week leading up to it. [What made it impactful for me] was not actually being in Israel. It was really the people on the trip. And all of a sudden, I had 80 people, other young Jews who were my same age. We were 15 and 16 years old, who I had these deep, wonderful connection relationships with, and it made a friend group that was even more deep than some of my friends from regular high school. And so that to me was really transformational to have a really strong group of other Jews who also had a similar immersive experience together. So that was just a wonderful experience. And I know I didn’t go to Jewish summer camp, I didn’t go to day school, I just didn’t do these things. And so that was really—it made me realize that having a Jewish community and Jewish friends was something that I wanted to have in my life... I think it was just traveling together, being together all of the time. I mean, you were sharing rooms. It was every waking hour. It’s not like a high-end luxury trip where it’s like, “Okay, you guys have free time for today. Go shopping,” and everyone has their own room. I mean, we were bunked up, we were on the bus, we were going from place to place. It was just all of these incredible memories together. And it was a long enough period of time that you really got to be together.”*

If this experience proves to be common, it raises the possibility of creating meaningful group experiences for young Jews without the added cost of overseas travel, for example, by traveling locally while engaged in a service-learning program.

Leaders who talked about longer stays in Israel often had more to say about the experience. Five people said they had meaningful experiences studying at Pardes after college. They highlighted the pluralism of the institute and attitude of intellectual inquiry that was cultivated among Jews from different denominations as they studied texts and reflected on what it means to live a meaningful Jewish life today.

*“For me, Pardes was influential because—so it is an institute based in North America and in Jerusalem, but the primary activities of Pardes happen in beit midrash style in Jerusalem. [...] It’s a pretty unique place in that it’s one of the only seminaries for people in Israel post-college that studies traditional Jewish text, ancient and contemporary but in a very traditional way but with a very progressive non—it’s not like a Orthodox—although many of the teachers are Orthodox, the agenda there is not that people are coming out necessarily more religious. It’s really a place of like intellectual inquiry and yet it’s deeply-rooted in religiosity, like it’s deeply-rooted in our ancient text. It’s not just a contemporary conversation and that’s just very unique. And the reason why I guess I put that as being formative was [because of] my upbringing, as someone who grew up in the Reform Movement—and not really even in the Movement, really on the peripheral of Jewish life... When I decided to go to Pardes, because I didn’t have a lot of Jewish formal learning and I was getting interested, it was this ah-hah moment of understanding that there was like a middle space to deeply engage in Judaism, to live through a lens of Jewish life and like Jewish values and be rooted in text, and yet be like a contemporary, modern person who didn’t necessarily have to buy into everything in order to engage with it. So it was kind of the first time I understood like I think religious nuance and that there were people who are highly educated in Judaism to some extent, if maybe not even more so, than a lot of people who looked very religious but who the study of Jewish text and engaging in Jewish education had a very different impact on them. And so I think that just opened me up to actually considering like, oh, this is worthwhile, like I could see myself in this community and in this space. And it was the other first example of where I saw pluralism play out [in] a real way.”*

These leaders recounted that studying at Pardes gave them greater confidence in their personal understanding of Jewish texts and traditions, an appreciation for pluralism, and the ability to work in a diverse setting.

*“When I graduated, I went to study at Pardes ... And I already was interested in education but now I was like, “Oh, this is – ” you know. So, I think for me, the experience of having the opportunity to go and be immersed in Jewish learning was significant. At the time, it was sort of for me filling a gap, but as a current leader reflecting back, I think having such a rich background in text [and my experiences later engaging with families] from many different backgrounds and being able to both understand and also be in dialogue and negotiate and navigate the challenges and intricacies of Jewish life and halakha and all those things I think were substantial for me, and I think really set me up for success.”*

## **Designing Jewish Journeys**

Beyond sharing their own journeys, many of the people we interviewed offered advice about how to facilitate Jewish journeys for the next generation. Many of them distinguished between content and commitment as two aspects of Jewish education, with commitment being the more critical element of the two. One reason commitment was prioritized was as a prerequisite to further learning “because for so many people not raised in this, not committed to this, there’s no motivation to learn.” Another reason commitment was prioritized was because Jewish texts and traditions, like leadership skills, can be learned, but commitment is the integral element of Jewish authenticity:

*“We have a dichotomy. We have people who are deeply, deeply Jewish in terms of their Jewish identities and their passion and for the Jewish mission but don’t have the leadership stuff. And then we have leadership people who may not have the passion, the depth, the... thick Jewish identities. And that’s hard to me. People can be anywhere on their Jewish journey and anywhere on a continuum of Jewish identification. But I think we need people who love and want to be deeply engaged with the Jewish [part of their identities if they’re] leading Jewish organizations.”*

A personal account supported the view of content knowledge as secondary to commitment, because some people choose to learn more later, learn independently, or seek out ways to contribute to Jewish education that do not require an in-depth knowledge of Jewish texts.

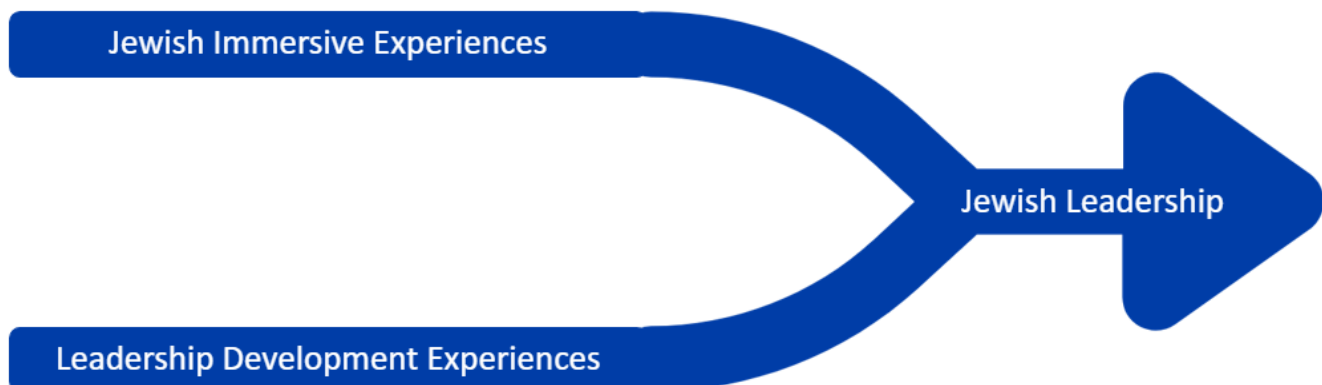
*"[Other people] had master's degrees in Jewish education, rabbis, PhDs in Jewish education, or just serious Jewish day school. And I had none of that... I feel a little sad for myself that I never got to have someone write a course of learning for me that I could then study... And instead I kind of learned it on my own. Now, partly, that might have freed me up to just think differently about it."*

In a comment about the value and purpose of a Jewish day school experience, content and commitment were reflected as the need for a holistic approach that succeeds in conveying both content knowledge and values:

*"We probably have done a disservice by creating a Jewish education space that's separate from Jewish living, and being able to integrate the two is sort of good for everybody. You know, I send my kids to a Jewish day school. Do I want them to just learn facts or do I also want them to experience being part of community and be surrounded by a certain set of values. No, that's why we do it, it's for all of it, not just for the educational components of it."*

Many people talked about experiences that were particularly effective because they were regular (like day schools), cyclical (like seasonal camping), recurrent (like programs that bring cohorts together for multiple gatherings), or long in duration (like sustained text study). One leader discussed the importance of building rhythm and repetition into immersive experiences so that learning can be carried over into everyday life:

*"My sense is that it can't be only through immersive experiences, that we invest a tremendous amount of money in immersive experiences in the Jewish community, whether those are camping or Birthright or, you know, even Encounter—Like these experiences that are meant to kind of shake you up a little bit, shake you out of what you're, out of the norm and awaken you to a different way. But it had, we have to match immersive experiences with rhythm, with rhythmic experiences where there's a kind of ongoing engagement afterwards. Because people come home from camp. And if they can't match the feeling that they have on Friday night services at camp with anything at home, then they just feel like camp is really special, not Jewish life informs the way I live every day. If they go to Birthright and they feel connected to their Jewish identity and then they come home and they walk into a synagogue and*



*feel completely alienated, then they think, oh, the Birthright experience was really powerful. But that's not ultimately what we want, right? We don't want to attach people to one particular program or organization. We want to attach them to the ideas and the impulses that are behind them. So I think it's some combination of immersive and rhythmic engagement that helps people understand that you have to translate these ideas. And you have to start again and again and again."*

The idea of a rhythm of experiences invites an interesting perspective on field-wide collaboration: the impact of organizations and programs can be amplified by thoughtfully coordinating between different organizations and institutions to assure that Jewish individuals and families of all demographics can engage in compelling Jewish learning experiences at a regular rhythm that stays in step with the pace of everyday life.

### **Summary: Preprofessional Immersive Experiences**

A leading trend throughout all kinds of personal experiences described above is the benefit derived from an experience that helped a leader to develop a firm grounding in knowledge of Jewish texts and traditions that gave them the confidence to see themselves (and be seen by others) as a Jewish leader or educator.

Since many of the leaders we interviewed are engaged in developing novel ways to provide Jewish learning and community experiences, we found it significant that their own early personal experiences were overwhelmingly the kinds of traditional experiences that are provided by established Jewish institutions, especially youth groups and camping.

Prolonged immersive experiences with a social cohort element with opportunities to practice leadership by taking on challenging assignments in a low-risk environment stand out as particularly effective. The emphasis we observed on prolonged experiences makes us wonder how long an immersive experience needs to be for its developmental benefits to be realized. For example, how much text study does a Jewish education or nonprofit leader need to feel sufficiently confident in their level of Jewish learning? What trip durations, venues, and activities provide the best opportunity for group bonding among different age groups around shared values, experiences, or purposes? What is the ideal balance between imparting a sense of responsibility to young leaders taking on challenging assignments and creating a low-risk environment for experimentation in which failures, instead of leading to derailment, will be remembered as productive learning experiences?

Youth groups and camping stood out from other youth experiences for several reasons. They each offer a long-term immersive social environment in which young leaders create a sense of community, take on responsibilities and challenging assignments, and work together with peers to accomplish their goals. Several of the accounts we heard suggest that these early leadership learning experiences set the stage for continued value-driven leadership later in life.

*"Yeah, I mean, my first leadership role was in youth group. Youth groups and summer camps in the Jewish community are the places where a lot of people have their first leadership experience, and yeah, I learned a lot from those experiences about how to—the sense of responsibility, how to be inclusive and try to make the communities I was leading in spaces that were open and comfortable for everyone. You know, the awareness of—again, on sort of a teenage/juvenile level, but the awareness of the power that comes with and not to abuse the power that comes with certain leadership roles. But it also gave me a taste for, you know, it's the place where I realized I have some talent for this and it fuels me and interests me and that was a big reason I ended up devoting my career to it, because it was meaningful, satisfying, you know, and gave me at that young age a sense of commitment to something and purpose."*

We see in these activities several strategic opportunities to simultaneously increase the number of young Jews who have the opportunity to practice leadership while also enhancing the developmental quality of their early leadership learning experiences. Youth groups can be supported through sponsorship, recognition, and opportunities for groups from different communities to meet and work together. At the same time, they can be strengthened by encouraging information sharing among groups about the practices and frameworks that have proven to be most effective at engaging young people and providing positive leadership learning experiences. We expect that youth groups can benefit from experiences and training designed to help young leaders learn particular leadership skills. The first is boundary spanning practices for working across differences and in pluralistic contexts. The second is how to mobilize effective community responses to crises such as human rights abuses, humanitarian crises, or public tragedies. The primary concern we heard about camping experiences is their accessibility. If it is true, as one interviewee reasoned, that camping has the potential to create an impact comparable to eighty Birthright trips, and yet “90% of Jewish children aren’t going to Jewish overnight camp,” then additional research should be conducted into how Jewish camping experiences can be made more accessible.

The sections above described how young Jewish leaders develop through preprofessional experiences that we can interpret in terms of the five categories defined in the Lessons of Experience (LoE) literature: developmental relationships, challenging assignments, formal training programs, adverse situations, and personal experiences. These experiences were tightly interwoven. We can talk about each type of experience on its own and identify what elements contribute to making it a more effective means of leadership learning, but it is important to remember that these experiences are connected. For example, what makes developmental relationships especially significant is often the fact that they provide support to leaders while they take on challenging assignments or face adverse situations.



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, colorful markings on it. 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.

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*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.*

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## 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.



## APPENDIX 1: The 83 Jewish Leaders Interviewed

Aaron Katler	Elan Babchuck	Marty Linsky
Abigail Michelson Porth	Eliav Bock	Maya Bernstein
Adam Eilath	Elie Kaunfer	Megan Harkavy
Adam Simon	Elka Abramson	Melissa Weintraub
Alex Shabtai	Eric Fingerhut	Mimi Kravitz
Alicia Oberman	Erica Brown	Mordy Walfish
Aliza Kline	Faith Leener	Nina Bruder
Amanda Pogany	Felicia Herman	Paul Bernstein
Amichai Lau Lavie	Gali Cooks	Rachel Isaacs
Ana Robbins	Heather Moran	Rachel Monroe
Angelica Berrie	Hindy Poupko	Rafi Rone
Anna Hartman	Idit Klein	Robert Bank
Anne Lanski	Ilana Aisen	Ruth Messinger
Ari Hart	Ilana Kaufman	Ryan Woloshin
Ari Kelman	Irving Greenberg	Sara Luria
Avi Rubel	Jacob Cytryn	Sarah Eisenman
Benay Lappe	Janet Harris	Sarah Waxman
Chip Edelsberg	Jay Moses	Sharon Brous
Dan Horwitz	Jeff Kasowitz	Sheila Katz
Dan Smokler	Jen Zwilling	Shifra Bronznick
Daniel Septimus	Jenny Camhi	Shuki Taylor
Danielle Natelson	John Ruskay	Stefanie Rhodes
David Bryfman	Judith Belasco	Stosh Cotler
David Cygielman	Kathy Manning	Susan Kardos
David Katznelson	Lisa Goldstein	Tamar Remz
Dean Bell	Liz Fisher	Wendy Rosov
Deborah Newbrun	Marc Baker	Yehuda Kurtzer
Doron Krakow	Mark Young	

## APPENDIX 2: Interview Protocol

These questions are adapted from the original Lessons of Experience protocol (see McCall, Lombardo & Morriison 1988) and will be used to inform the interview guide. Feedback and revisions from the RAC will be utilized for the final draft.

### Section 1: Preparation (send ahead)

When you think about your career thus far as a leader in a Jewish educational organization, certain events or episodes probably stand out in your mind – things that led to a lasting change in your approach as a leader. We will ask you to identify ahead of time three “key events” in your Jewish leadership journey. We will provide a link for you to enter this information. When we meet with you, we’ll ask you about each event:

- What happened?
- What did you learn from it (for better or worse)?
- Interview Preparation Form/Survey
  - Collect the three ‘key events’ (explained above)
  - Self-identify career level (other demographics?)

### Interview

#### Section 1: Clarifying

Any specific questions that come up as a result of their pre-interview form response that aren’t covered by the questions below.

#### Section 2: Key events

Rites of Passage

- What was your first leadership role within the field of Jewish education? Was there anything special about it?
- (Senior/Mid) What was your first “quantum leap/big break” – movement to a job with significantly more responsibility/challenge/pressure than prior jobs? (Describe experience/implications)
- What is the biggest challenge you have faced in your career?
- What was your most frightening first – something you did for the first time that really had you worried?
- Learning from Challenges
  - What was a significant near miss – a time when you tried something and failed?
  - (Senior/Mid) Describe a time when you pushed things to the brink – that is, a time when you

stretched the system by coming perilously close to violating rules, norms, or authority.

- (Emerging) Thinking ahead into the future, can you see an impending challenge or a time that you might need to stretch the system or push it to the brink (come close to violating rules, norms, or authority) to advance work you see as important?
- Were you ever worn out or fed up, but managed to restart? What enabled you to restart?
- Please describe the person who has taught you the most during your journey. What did that person do that made him or her so special?
- What was your most significant interpersonal conflict – a situation in which dealing with another person (or persons) was very difficult for you?

### **Section 3: General Questions**

- What part have events in your personal life played in your growth as a leader?
- What are your strengths as a leader?
- Where would you like to grow?
- (Senior) What advice would you give to a younger leader in Jewish education about managing his or her career?
- What's next? Are you facing a situation now from which you expect to learn something new?
- (Emerging) What is your biggest hope for the field of Jewish education? How would you like to see it transformed?
- What are the areas where you feel more leadership development could have the most impact on improving the quality of Jewish education?

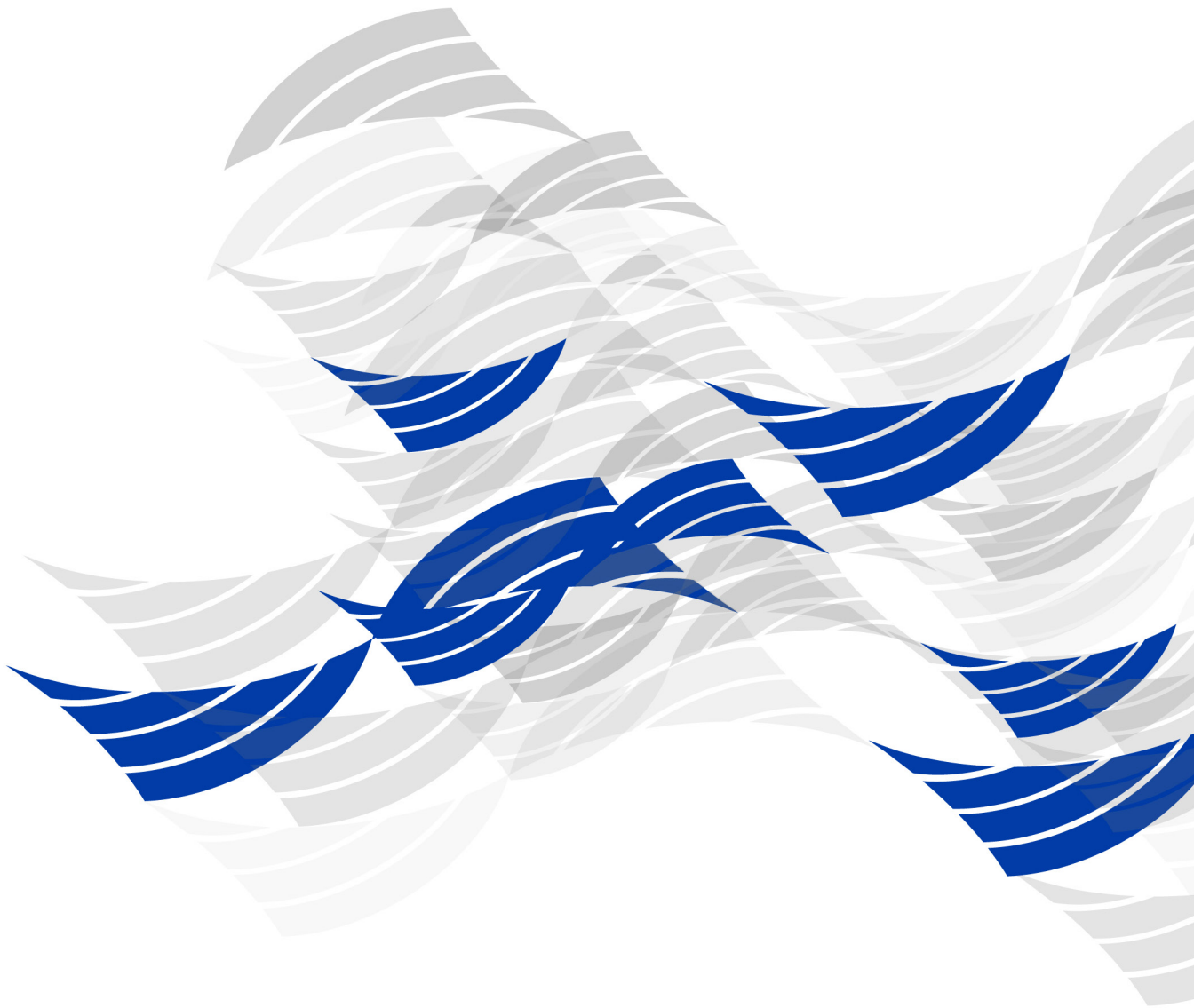
### **Section 4: Leading in Jewish education**

- What do you consider some of the most significant trends, events, and developments shaping the future of this community?
- What do you see as the most pressing challenges for Jewish education organizations? (ask about challenges if they don't bring this up in the context of the first response)
- What type of leadership skills are needed to navigate this challenge (these challenges)?
- What shared values, commitments, or collective practices are needed in order to advance the field of Jewish education?

## **APPENDIX 3: Qualitative Coding Manual**

Examples:

- What people or projects have you seen that you felt were really promising (whether or not they succeeded)?
- Have you participated in a formal leadership program related to your role in the field? What components were most meaningful?
- Who else should we interview?



### **STORIES: FORMATIVE/DEVELOPMENTAL**

Use this for stories of life before entering the work force that relate meaningful experiences, with a focus on capturing three narrative elements: (1) what happened, situation, context, (2) the critical determining factor, why it was significant, and (3) a lesson learned, insights or other significant outcome.

The interviewee had some experience which may have been similar in situation to many other people's experiences, (eg. camping, day school, Israel travel) but for some critical reason, the experience was especially meaningful or formative for THIS person, and produced some outcome, for example, a lesson learned, a realization, or a sense of purpose.

### **STORIES: PROFESSIONAL/WORK**

Use this for stories after entering the work force that relate meaningful experiences, with a focus on capturing three narrative elements: (1) what happened, situation, context, (2) the critical determining factor, why it was significant, and (3) a lesson learned, insights or other significant outcome.

These include professional experiences and challenges, promotions, discussion of career trajectory, job changes, work place challenges including trauma, burnout (and recovery), failures.

This category has to do with work more than the people one works with. For that, tag RELATIONSHIPS.

#### RELATIONSHIPS

This category is about relationships and especially learning from others. Spouses, kids, mentors (but not professional coaches), work relationships (including hiring/firing, working with a board), personal relationships, positive and negative role models, supportive people, etc.

#### LEADERSHIP DEVELOPMENT

Mark participation in formal LD programs, experiences, or professional development training, 360s or other assessments, professional coaching, etc. Also mark personal leadership challenges (eg. "I'm not a risk-taker by nature") and opinions about leadership development. For leadership skills needed to face challenges mark ADVICE.

#### JEWISH SECTOR

This code is for perspectives on the Jewish nonprofit/educational sector(s), especially discussions about pertinent realities of the sector, challenges (if not one of the FIVE CHALLENGES below), interesting developments, issues, and hopes for the future. Examples of sector-level issues are:

- Polarization (ie. divisiveness; not the same as POLARITIES)
- Funding /financial struggles/resources (for coordinating/allocating funding use NETWORKS)
- Thoughts on what funders should do to support the sector.
- "The business side of things" AKA the organized Jewish community.

## ADVICE

If a comment strikes you as valuable advice, a clever technique or approach to a common challenge, etc., please apply this code.

- Eg. Journaling as a learning technique, how to develop mentoring relationships, etc.
- Include skills leaders will need to meet challenges in the sector or retrospective lessons-learned because they can be read as indirect advice to future leaders -- and also tag LEADERSHIP DEVELOPMENT

## GENDER & EDI

- Equity, diversity, inclusion (within a context or environment, such as a workplace, synagogue, etc. For general diversity of the Jewish community, tag COMMUNITY unless there's indicated potential for exclusion).
- Issues where gender plays a significant role, whether equal pay & promotion, family leave, harassment, etc.

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## FIVE CHALLENGES

- You don't need to mark FIVE CHALLENGES when you mark any items below. We have the option to automatically "up-code" to include this tag later if needed.

### 1. Polarity

Tension between opposing forces, approaches, needs.

- Eg. Dynamics of legacy Institutions vs. Startups/innovation
- Eg. Pay-to-play programs vs. Serving as many people as possible with free programs.
- Eg. Focus on higher number of attendees vs. depth/quality of interaction with fewer people.

### 2. Community/Identity

This code is for perspectives on the overall Jewish Community.

- Jewish identity, sense of being Jewish and/or sense of being part of the Jewish community.
- Talking about demographics and/or diversity within the Jewish community (among the people).
- Inter-generational differences and/or bridges

### 3. Education

- What is needed to deliver Jewish learning experiences? Anything about the needs of the learner, understanding and meeting them where they are to ensure a great experience. Accommodating learners/participants through diverse programming and range of offerings.
- Approaches to pedagogy. Need, method, or practice to incorporate Jewish learning/values/content into anything (LD, events, programs, etc)

- Amorphous definition of “Jewish education” and/or educator

#### 4. Pipeline

- About the application of (or need for) processes, practices, and strategies that aim to prepare people for jobs and/or leadership within the sector through recruitment, retention, succession planning, and supporting development.
- Moving through the pipeline: How someone got into working in the Jewish sector, got their job or promotion. Pathways to and among Jewish jobs.
- Reasons people may leave the sector, not advance, etc.

#### 5. Network

Use this code for networks, networking, connecting. Opportunities for connection.

- collaboration, coordination, communities, communities of practice, cohorts (formal or informal)
- Feeling of group belonging (in discreet groups; not in Jewish community generally; for that, tag COMMUNITY).
- Need or potential benefit of connecting through networks. Eg. bridge-building, linking silos (if relevant, also tag JEWISH SECTOR), including diverse perspectives (if relevant, also tag GENDER & EDI), coordinating funding or other resources, etc.
- inter-organizational or community relationships (not relationships with particular individuals = RELATIONSHIPS)

## APPENDIX 4: Machine Coding Labels and Search Terms

We applied a machine coding technique to recognize the presence of words or phrases in the interviews that relate to a number of topics. The list below gives the code in bold followed by its associated search terms or phrases.

An asterisk is a wildcard character that can match any letter(s). The vertical bar separating search terms instructs our program to record a match if any of the terms is found in a text.

mentor\* | adviser | advisor

### **Coach:**

coach | coaches | coaching

### **Parents:**

mother | mom | father | dad | parent | parents | maternit\* | paternit\*

### **Families:**

mother | mom | father | dad | parent | parents | brother | brothers | sister | sisters | son | sons | daughter | daughters | husband | wife | spouse | our kid\* | my kid\* | their kid\* | his kid\* | her kid\* | childr\* | grandfather | grandmother\* | aunt\* | uncle\* | nephew\* | niece\* | family | families | baby | babies | infant | infants | toddler\* | maternit\* | paternit\*

### **Money:**

money | salary | pay\* | fee | free | dues | cost\* | expens\* | wage\* | fund\* | donor\* | philanthro\* | grant | grants | grantee\* | afford\* | budget\*

### **Cohort:** cohort\*

### **Collaboration:**

collab\* | partn\* | coordi\* | allocat\*

### **Work Relationships:**

boss | supervisor | employee\* | staff | assistant\* | director\* | intern\* | board member\* | to hire | hired | to fire | fired | firing | hiring | ceo

### **Clergy:**

rabbi | rabba | clergy\* | seminary\* | ordinati\* | rabbin\* | imam | priest | pastor

### **Fatigue:**

out | frustra\* | exhaust\* | tired | tiring | depress\*

### **Denom. & Pluralism:**

conservative | orthodox\* | reform | progressive\* | reconstruction\* | HUC | JTS | Hebrew College | Yeshiva | chabbad | pluralis\*

### **Federation:**

federation\* | JFNA | UJA

### **Camping:**

ramah | camp\*

### **NextGen & Youth:**

teen\* | youth\* | next gen\* | ECE | early child\* | young\* | childr\* | millenia\* | gen x | gen y | gen z | continuity | high scho\* | BBYO | kid | kids

### **Gender & Sexuality:**

woman | women | female | glass ceil\* | gender | men | man | male | girl\* | boy\* | proper pronou\* | correct pronou\* | trans pers\* | trans peop\* | transgen\* | trans woma\* | trans man | gender\* | lgb\* | queer | lesbian | gay | bisexual | sex | sexua\*

### **Race:**

of color | black | white | joc | race | racial | racis\* | sephard\* | mizrah\* | ashken\* | europea\*

### **School:**

\*schoo\* | universi\* | college | elementary | yeshiva | midras\* | seminar\* | rabbini\*

### **Israel:**

israe\* | jerusa\* | tel aviv\* | temple | western wall\* | aliyah



## APPENDIX 6: Interview Follow-Up Survey

### Jim Joseph Foundation & Center for Creative Leadership Cross-Portfolio Research Study of Leadership Development in Jewish Education

Thank you for participating in the interview with Center for Creative Leadership a few months ago!

We would like to ask you a few follow up questions in this short survey about five different types of experiences and their influence on your development as a leader. All of your responses will be kept confidential and will not be reported in a way that can be connected to you or your organization. We will use this research for our cross-portfolio study of leadership development in Jewish education, funded by the Jim Joseph Foundation, that will be released in 2020.

*All of the questions are optional, but your responses are important to our research.  
The survey will take 3-10 minutes to complete.*

[Start of Survey]

#### Formal Leadership Development and Training Programs:

If you have participated in a formal leadership development program or other academic, professional, or technical training program, please indicate how influential it has been for your development as a leader.

*Enter the names of up to five programs you have participated in.*

*eg. The Wexner Field Fellowship*

*eg. CCL's Leadership at the Peak*

*Select 1 for "not influential" and 5 for "very influential."*

*Leave items blank if you have not had the experience.*

	Influence on my development as a leader					How did it affect your development as a leader?
	1	2	3	4	5	(optional)
Program or fellowship name: <input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Program or fellowship name: <input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Program or fellowship name: <input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Program or fellowship name: <input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Advanced learning (immersive study, graduate study, certificate training, etc.) <input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
A professional or technical skill development program <input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

In your experience, what contributes most to a leadership development program being beneficial?

**Challenging Assignments:**

For the following types of challenging assignments or experiences, please indicate how influential each has been for your development as a leader.

Select 1 for "not influential" and 5 for "very influential."

Leave items blank if you have not had the experience.

	Influence on my development as a leader					How did it affect your development as a leader?
	1	2	3	4	5	(optional)
An increase in the scope of your responsibility	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Managing employees or a team for the first time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Leading a process of change in your organization or community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Leading a new initiative, program launch, or business startup	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
A work transition between roles, regions, or to another organization	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Engaging directly with stakeholders (internal or external to your organization)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Navigating in a different culture (whether a foreign country, or between organizations with different cultures)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Another experience: <input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Another experience: <input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

**Developmental Relationships:**

For the following types of developmental relationships, please indicate how influential the relationship has been for your development as a leader.

Select 1 for "not influential" and 5 for "very influential."

Leave items blank if you have not had the experience.

	Influence on my development as a leader					How did it affect your development as a leader?
	1	2	3	4	5	(optional)
Someone I respect expressing confidence in my leadership ability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
A supportive parent, family member, or friend	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
A constructive or supportive boss or supervisor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Consulting a teacher or mentor about my life, development, or career	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Working with a coach	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Interacting with difficult people	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Another relationship: <input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

**Adverse Situations:**

For the following types of adverse situations, please indicate how influential each has been for your development as a leader.

Select 1 for "not influential" and 5 for "very influential."

Leave items blank if you have not had the experience.

	Influence on my development as a leader					How did it affect your development as a leader?
	1	2	3	4	5	(optional)
A career setback (being fired, demoted, going out of business, missed promotions or opportunities)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
An organizational or community crisis or scandal	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
A communal tragedy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
A personal tragedy or trauma	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Witnessing or confronting an ethical dilemma	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
An interpersonal conflict	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
An existential crisis	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Another situation: <input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Another situation: <input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

**Personal Experiences:**

If you have had any of the following personal experiences, please indicate how influential it has been for your development as a leader.

Select 1 for "not influential" and 5 for "very influential."

Leave items blank if you have not had the experience.

	Influence on my development as a leader					How did it affect your development as a leader?
	1	2	3	4	5	(optional)
Jewish day school	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Jewish camping experience	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Jewish youth group	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Jewish experiences during college	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Israel travel program	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Another experience in youth or young adulthood: <input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Another experience in adult life: <input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Another experience: <input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

**Final thoughts:** What types of experiences should be prioritized to develop future Jewish leaders (and why)? *(Optional)*

Use this space to add anything you would like to say, including additional comments about (1) participation in leadership development programs, (2) challenging assignments, (3) developmental relationships, (4) adverse situations, and (5) personal experiences. *(Optional)*

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[End of Survey]

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We thank you for your time spent taking this survey.  
Your response has been recorded.

## APPENDIX 7: Notes on Challenging Terminology

Soon after beginning our research, we found that our fundamental terminology was causing confusion: What exactly is the field of Jewish education, and who is a Jewish educator? It was especially striking to hear people who provide thought leadership or serve in senior positions of organizations that support Jewish communities or that facilitate Jewish learning experiences objecting that they had never worked in the field of Jewish education, and were therefore not suitable to be interviewed. Some of the leaders we invited to be interviewed declined outright on those grounds, while others agreed to participate after their objections to the terminology had been explained and noted.

In some cases, objections to the term centered on the speaker being uncertain about where to draw the boundaries of Jewish education as a field: “on some level, I’m a Jewish educator, but I’m not like working in the Jewish education field exactly.” In other cases, there was hesitation to see oneself in the role of an educator, narrowly defined:

*“I’m still struggling a little bit with where leadership and Jewish education come together and feeling like they’re—there’s leadership in general, which spans different fields. And then there’s—when I think of Jewish education, I’m typically thinking about educators and wondering contextually if you’re thinking about Jewish educators as leaders, or are we talking about two different things here?”*

[Interviewer]: Where would you put yourself in that?

Probably a leader of a Jewish organization that’s involved in Jewish learning.”

Hesitation to be labeled as a Jewish educator was often also characterized by humility regarding one’s level of Jewish learning or practice, or by conceptualizing the role of a Jewish educator as being exclusive of other roles or identities. One interviewee, surprised by the characterization, replied, “I feel like I, by definition, am not a Jewish educator. You know, I have a degree in [a secular field]!” Another offered a more structured rationalization for exemption:

*“I don’t have any firsthand knowledge or experience of Jewish education as it’s traditionally understood. There seems to be a field of Jewish education which is about day schools, summer camps, yeshivas, etc., so there’s a field. I’m not part of that field. That would be one response. The second is, I’m almost always the most secular person in the room, so I don’t think of what I do [...] as Jewish. It certainly isn’t Jewish if you would define that by referencing or acknowledging Jewish text, or Jewish law, or Jewish tradition of culture in any particular way. So those are the two ways in which it doesn’t seem to me what I have done is about Jewish education. One, it’s not education in a traditional sense, and two, it’s not Jewish in the traditional sense.”*

Conversely, interviewees who accepted being characterized as Jewish educators tended to connect it with personal experiences involving increased Jewish learning or practice. When about to take a position in a Jewish organization, an interviewee initially disputed the label to her supervisor, saying, “‘I haven’t done anything formal in Jewish education; I’m not a Jewish educator, but I would love to come back and work [in a Jewish setting].’ So I immediately got re-immersed in the whole Jewish side of the culture.” Some linked the role with prerequisite knowledge: “[Intensive study in Israel] was very, very foundational, really, for me. And, also, just the fact that I now know Hebrew. It’s just that I can’t imagine how you can call yourself a Jewish educator and not know Hebrew. It’s so foundational. I learned so much. I learned how to study text. I learned about politics and philosophy, and history.” One interviewee prescribed taking on the role as though it is, in itself, a spiritual practice or path leading to holistic self-realization, proposing that “a reason to be a Jewish educator is [that] you integrate all the parts of yourself. You become a better person and you will find Judaism

in all new ways for yourself, in ways that are appropriate for you and who you are more deeply.”

This issue should be understood as much more than a semantic dispute. Leaders grow through the consolidation of their personal, social, and professional identities. We learned from these interviews that going through the experience of pursuing Jewish learning in a structured learning environment helped Jewish leaders think of themselves as Jewish educators. That shift in identity self-perception is part of what opens the door for leaders to feel responsibility for and commitment to an educational endeavor. It is a shift in self-perception that can be transformative for how leaders choose to direct their efforts. Without this opportunity to engage in structured learning, someone may develop into an effective and inspiring Jewish leader, yet may not accept that they are a Jewish education leader. It will be more difficult to coordinate the efforts of Jewish leaders if they do not believe they are contributing to a shared field, whether that field is called Jewish education or something else. This suggests that providing Jewish leaders with a diverse range of accessible options for structured Jewish learning may be critical to the goal of developing leaders for the field of Jewish education.

We also heard many people deliberately challenging the notion that Jewish education or the role of a Jewish educator can be rigidly defined. For example, one person emphasized the essentially educational role of a fundraising professional, because their work is centered on informing people about community values and needs and how organizations are responding to meet them. Others were adamant that leaders of Jewish organizations should understand themselves as educators because they play a vital role in what is ultimately an educational enterprise. “I consider the head of a Federation a Jewish educator.” In a sense, this doesn’t apply only to people in leadership roles. “They’re all Jewish educators. Even if they’re the financial people or they’re running the kitchen or whatever, they’re all Jewish educators.” We also heard people talk about a shift in how the field of Jewish education is being understood, for example, observing that “the blurriness between education and engagement in the last five to ten years is becoming more and more dominant. If you were doing this study 10 years ago, [many of these people] would not even have been classified as Jewish educators. But now, for whatever reason, they are in this Jewish education space.” Some wanted people to allow more flexibility in the categories. “You’re not just someone that actually belongs back in the Jewish professional world, but you’re actually an educator. You’re a Jewish educator and you don’t really know it. I mean, you’ve done Jewish education, but you never called it that.” The Jim Joseph Foundation considers Jewish education to be a flexible category that can be carried out in a variety of ways and settings.

*“Successful educators and successful leaders have much in common: they ask good questions, they are good managers, they have vision and they are constantly learning themselves. It is not surprising that a founding principle of the Jim Joseph Foundation is that Jewish education should be loosely defined as that which imbues leadership skills in youth.”*

Nevertheless, many of the leaders we interviewed were still grappling with the issue of whether or not Jewish education is a specific, separate species of activity, or whether it includes demonstrating, expressing, and conveying Jewish values through the medium of one’s everyday life and work. “I think we have erred way too often on the extreme of putting Jewish education in a box: ‘I will now have my Jewish learning moments,’ as opposed to it being just part and parcel of what we do.” In the interviews, even when there was confusion around the terms and assumption that Jewish education is a more limited category, people observed benefits of adopting a more expansive view:

*"I like the idea of thinking about education more broadly, and education as like learning in lots of different ways, and learning through different kinds of experiences, whether it be entirely intellectually or some of these other ways that I've been talking about. In what ways can we broaden the scope of what learning looks like? And, like I said before, how might we focus on what the—like really get right the end goals of our Jewish learning work: why are we investing in this?"*

Clarity and agreement on key terminology is a prerequisite to leadership in the sense of generating shared direction, alignment, and commitment among a group. Given that supporting Jewish education is central to the Jim Joseph Foundation's grantmaking strategy, generating agreement about the nature of the field of Jewish education and who should be called Jewish educators will be a prerequisite to enabling professionals working in Jewish education to recognize that they have an educational role and that their work is integral to supporting an educational ecosystem.

It is also worth noting that not all Jewish education leaders identify as Jewish. For example, if a program director, camp counselor, social worker, nursing home manager, or even a math teacher in a Jewish day school does not have any Jewish heritage or personal connection to Judaism, it may seem awkward to label them a Jewish educator even when their work is unambiguously centered in the field of Jewish education. Language is a critical enabler (or interruptor) of inclusion. To the extent that the language limits who identifies as being involved in the practice of Jewish education, it limits the ability of leaders to feel included and identified as a leader in the Jewish education space. Once a sense of shared direction is established in the Jewish professional community's collective understanding, it will be possible to more strategically align the efforts of individuals and organizations advancing diverse efforts throughout the field.

## ACKNOWLEDGEMENTS & EDITORIAL NOTES

### THANK YOU!

All of us at the Jim Joseph Foundation and at the Center for Creative Leadership (CCL) wish to express our profound gratitude to the people who contributed in various ways to this research, especially the 83 leaders (named in Appendix 1) who generously shared their stories and insights through interviews and surveys as well as several others whose interviews could not be arranged in time for this report. We owe a special thanks to Mordy Walfish (Leading Edge) and Rella Kaplowitz (Charles and Lynn Schusterman Family Foundation), who reviewed our research drafts and provided insightful feedback. We are deeply grateful for the hospitality of those who invited a CCL researcher to gain invaluable firsthand experience through site visits and program observation. We also wish to express our appreciation to the many people who made time for conversations to explore topics and who offered a variety of perspectives to better inform the research.

We are grateful to all of you. This project would not have been possible without your generosity and support.

### EDITORIAL NOTES

Note that some quotations and other information have been drawn from sources other than the interviews, in which case, the source will be identified in the text or in a citation.

We have practiced silent editing, for example removing “like” or “sort of” when they appear to be artifacts of spoken language that a speaker would probably not use to express the same meaning in a written form. However, we don’t remove every occurrence; sometimes these words seemed to contribute to the expressiveness of a statement.

We have allowed a few instances of silent revision where a speaker immediately self-corrected to revise their own phrasing, the wording a speaker chose to abandon might be edited out of quotes to make reading easier and to reflect what the speaker decided to communicate.

We’ve used brackets or ellipses to provide context, facilitate the flow of language, or replace details that might identify a speaker with a generalization that conveys the same meaning, without altering their intended message. Silent ellipses are used where a quote has been condensed without significantly changing its meaning, or where the only change is to de-identify the speaker by removing specific details. Repeated instances of bracketed or standard ellipses may be omitted.

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## ENDNOTES

- <sup>1</sup> <https://jimjosephfoundation.org/learning-resources/cross-portfolio-research-study-literature-review-on-jewish-leadership/>
- <sup>2</sup> Jim Joseph Foundation, "About Us," *Jim Joseph Foundation* (blog), accessed December 28, 2018, <https://jimjosephfoundation.org/about-us/>.
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- <sup>6</sup> This pattern may be partly explained by the fact that although we used our interview protocol as a guide, it quickly became clear that allowing some flexibility in how we phrased our questions produced more productive responses. For example, asking "what was your first leadership role within the field of Jewish education" often led to tangential discussions about the terminology. Simplifying the question to ask more vaguely about a "first leadership role" may have prompted some interviewees to talk about youth leadership experiences.
- <sup>7</sup> Please note that the focus of our study is Jewish leadership development, not an evaluation of the outcomes of day school education. We did not specifically ask interviewees to talk about experiences or views relating to Jewish day schools, so the views here are anecdotal.
- <sup>8</sup> Michael DePass, Valerie Ehrlich, and Micela Leis, "Accelerating School Success: Transforming K-12 Schools by Investing in Leadership Development" (Center for Creative Leadership, 2019), <https://www.ccl.org/wp-content/uploads/2019/03/accelerating-school-success-by-investing-in-leadership-development.pdf>; Micela Leis and Susan Reinecke, *Social Emotional Leadership: A Guide for Youth Development* (Greensboro, NC: Center for Creative Leadership, 2020).
- <sup>9</sup> The beneficial mindset that enables leaders to learn from failures is discussed further in the section on early career development.
- <sup>10</sup> Nelson refers to this critical developmental period as the 10/13 window. Dr Alan E. Nelson, *KidLead: Growing Great Leaders* (United States: BookSurge Publishing, 2009), 40–49.
- <sup>11</sup> The value and functions of cohorts varies by context and career phase.
- <sup>12</sup> The experience of "being tapped" for a leadership role is discussed further in the section on career onramps.
- <sup>13</sup> With the emergence of specialty camps that emphasize development of particular skills, camps have even been called "the new internship." Hannah Dreyfus, "Camp, The New Internship | Jewish Week," *The New York Jewish Week*, May 27, 2015, <https://jewishweek.timesofisrael.com/camp-the-new-internship/>; Cf. Informing Change, "The Hard Work Behind the Magic of Camp: Results and Learnings from the FJC Specialty Camps Incubator II" (The Jim Joseph Foundation and AVI CHAI Foundation, July 2017), <https://www.jewishcamp.org/wp-content/uploads/2017/01/Final-FJC-Incubator-II-Evaluation-Report-7.28.17.pdf>.
- <sup>14</sup> Eileen Snow Price and Allison Boaz, "It's Time for a New Approach to Jewish Summer Camp," *EJewish Philanthropy* (blog), April 22, 2018, <https://ejewishphilanthropy.com/its-time-for-a-new-approach-to-jewish-summer-camp/>.
- <sup>15</sup> Several interviewees expressed concern about the high cost of participating in Jewish life, including camping experiences.
- <sup>16</sup> Dotlich et al. identified a similar set of "passages." David L. Dotlich, James L. Noel, and Norman Walker, *Leadership Passages: The Personal and Professional Transitions That Make or Break a Leader*, 1 edition (San Francisco: Jossey-Bass, 2004).

<sup>17</sup> Jeffrey Yip and Meena S. Wilson, “Learning from Experience,” in *The Center for Creative Leadership Handbook of Leadership Development, Third Edition*, ed. Ellen Van Velsor, Cynthia D. McCauley, and Marian N. Ruderman, 3 edition (San Francisco: Jossey-Bass, 2010), 73; Joseph Campbell, *The Hero with a Thousand Faces.*, The Bollingen Series ; 17 (New York: Pantheon Books, 1949).

<sup>18</sup> Our qualitative analysis did not provide this information, but other studies have explored derailment and may provide insight. It is also possible that we will uncover relevant information as our research continues. Further research into this topic would be valuable.

<sup>19</sup> “Are Jewish Organizations Great Places to Work? Results from the Second Annual Employee Engagement Survey” (Leading Edge, Fall 2017); Cf. “Are Jewish Organizations Great Places to Work? Results from the Fourth Annual Employee Engagement Survey” (Leading Edge, Fall 2019); For general research on derailment, see Michael M. Lombardo and Cynthia D. McCauley, “The Dynamics of Management Derailment” (Center for Creative Leadership, 1988); Michael M. Lombardo and Robert W. Eichinger, *Preventing Derailment: What to Do before It’s Too Late* (Greensboro, N.C: Center for Creative Leadership, 1989); Jean Brittain Leslie and Ellen Van Velsor, *A Look at Derailment Today: North America and Europe* (Greensboro, N.C: Center for Creative Leadership, 1996); Tim Casserley and David Megginson, *Learning from Burnout: Developing Sustainable Leaders and Avoiding Career Derailment*, 1 edition (Routledge, 2008); A. Furnham, *The Elephant in the Boardroom: The Causes of Leadership Derailment*, 2010 edition (Basingstoke: Palgrave Macmillan, 2010).

<sup>20</sup> We found the theme of serendipity in these interviews to be intriguing; the perception of serendipity regarding programs and other offerings designed to reach certain audiences and its potential effects deserve further attention.

<sup>21</sup> “Are Jewish Organizations Great Places to Work? Results from the Second Annual Employee Engagement Survey.”

<sup>22</sup> Gallup Inc., “What Your Performance Management System Needs Most,” Gallup.com, April 4, 2013, <https://news.gallup.com/businessjournal/161546/performance-management-system-needs.aspx>; Gallup Inc., “The No. 1 Employee Benefit That No One’s Talking About,” Gallup.com, December 21, 2017, <https://www.gallup.com/workplace/232955/no-employee-benefit-no-one-talking.aspx>.

<sup>23</sup> Roland Smith and Michael Campbell, *Talent Conversation: What They Are, Why They’re Crucial, and How to Do Them Right*, 1 edition (Center for Creative Leadership, 2011); E. Wayne Hart, *Feedback in Performance Reviews*, 1 edition (Greensboro, N.C.: Pfeiffer, 2013); Jean Brittain Leslie, *Feedback to Managers: A Guide to Reviewing and Selecting Multirater Instruments for Leadership Development 4th Edition*, 4 edition (Center for Creative Leadership, 2013); Johan Naude and Florence Plessier, *Becoming a Leader-Coach: A Step-By-Step Guide to Developing Your People* (Greensboro, North Carolina: Center for Creative Leadership, 2014).

<sup>24</sup> Aaron Dorfman and Justus Baird, “Evaluating the Secondary Impacts of Leadership Development,” 2016, <https://auburnseminary.org/report/secondaryimpact/>; recent research also demonstrates a secondary impact of leadership development on engagement networks. See Laine Bourassa, “The Ripple Effect: Youth Leaders and the Influence on Environmental Engagement in the Community” (Master of Arts, Psychology, Wilfrid Laurier University, 2017), <https://scholars.wlu.ca/cgi/viewcontent.cgi?article=3040&context=etd>.

<sup>25</sup> George Hallenbeck, *Learning Agility: Unlock the Lessons of Experience* (Center for Creative Leadership, 2016).

<sup>26</sup> “Re:Work - Postmortem Culture: How You Can Learn from Failure,” accessed November 14, 2019, <https://rework.withgoogle.com/blog/postmortem-culture-how-you-can-learn-from-failure/>.

<sup>27</sup> Cf. Cynthia D. McCauley et al., *Experience-Driven Leader Development: Models, Tools, Best Practices, and Advice for On-the-Job Development*, 3 edition (San Francisco, CA: Jossey-Bass, 2013).

<sup>28</sup> For example, see Jonathan Vehar, *Manage Your Boss* (Center for Creative Leadership, 2016).

<sup>29</sup> Jeffrey Yip, *Return on Experience: Learning Leadership at Work* (Center for Creative Leadership, 2009); See also Michael M. Lombardo and Robert W. Eichinger, *Eighty-Eight Assignments for Development in Place* (Greensboro, N.C: Center for Creative Leadership, 1989); Henry Browning and Ellen Van Velsor, *Three Keys to Development: Defining and Meeting Your Leadership Challenges*, 1 edition (Center for Creative Leadership, 2000); Cynthia D. McCauley, *Developmental Assignments: Creating Learning Experiences Without Changing Jobs*, 1 edition (Greensboro, N.C: Center for Creative Leadership, 2006); Center for Creative Leadership, Bill Sternbergh, and Sloan R. Weitzel, *Setting Your Development Goals: Start with Your Values*, 1 edition (Greensboro, N.C.: Pfeiffer, 2007); Kelly Hannum and Emily Hoole, *Tracking Your Development*, 1 edition (Center for Creative Leadership, 2009).

<sup>30</sup> Center for Creative Leadership, Karen Kirkland, and Sam Manoogian, *Ongoing Feedback: How to Get It, How to Use It*, 1 edition (Greensboro, N.C: Pfeiffer, 2007).

<sup>31</sup> Cf. Marian N. Ruderman et al., *Managing Your Whole Life* (Center for Creative Leadership, 2013); Vidula Bal, Michael Campbell, and Sharon McDowell-Larsen, *Managing Leadership Stress*, 1 edition (Center for Creative Leadership, 2008).

<sup>32</sup> Clarity about roles and separation of powers is vital in organizational and congregational settings across secular and religious contexts. Lack of role clarity contributes to burnout for leaders, and if conflicts in leadership are not resolved, they can harm employee morale or cause community schisms.

<sup>33</sup> Portia Mount and Susan Tardanico, *Beating the Impostor Syndrome* (Center for Creative Leadership, 2014).

<sup>34</sup> For example it can be observed in program evaluations that report alumni receiving promotions after the program. "Schusterman Fellowship Evaluations," October 10, 2018, <https://www.schusterman.org/jewish-community-and-israel/signature-initiatives/schusterman-fellowship/schusterman-fellowship-evaluations>; Receiving promotions is so common that it is listed as a program outcome for participants. "Schusterman Fellowship Report September 2019.Pdf," accessed October 21, 2019, <https://www.schusterman.org/sites/default/files/Schusterman%20Fellowship%20Report%20September%202019.pdf>.

<sup>35</sup> Sébastien Galliot, "Ritual Efficacy in the Making," *Journal of Material Culture* 20 (May 19, 2015): 672, <https://doi.org/10.1177/1359183515578248>; Bruce Kapferer, "Virtuality," in *Theorizing Rituals: Issues, Topics, Approaches, Concepts*, ed. Jens Kreinath, Jan Snoek, and Michael Stausberg, vol. 1, 2 vols., Numen Book Series 114 (Leiden: Brill, 2006), 671–84; Bruce Kapferer, "Virtuality," *Studies in the History of Religions* 114 (2006): 671–86.

<sup>36</sup> Increased confidence has also been evaluated as a program outcome. "Cohort1SeniorFellowsEvaluation.Pdf," accessed October 21, 2019, <https://schusterman-family-foundation-res.cloudinary.com/image/upload/v1551471748/Cohort1SeniorFellowsEvaluation.pdf>.

<sup>37</sup> See Center for Creative Leadership, Corey Criswell, and Talula Cartwright, *Creating a Vision*, 1 edition (Pfeiffer, 2010); Center for Creative Leadership, Talula Cartwright, and David Baldwin, *Communicating Your Vision*, 1 edition (Greensboro, N.C: Pfeiffer, 2007).

<sup>38</sup> Cf. Center for Creative Leadership, Curt Grayson, and David Baldwin, *Leadership Networking: Connect, Collaborate, Create*, 1 edition (Pfeiffer, 2011).

<sup>39</sup> Dotlich, Noel, and Walker, *Leadership Passages*, 76.

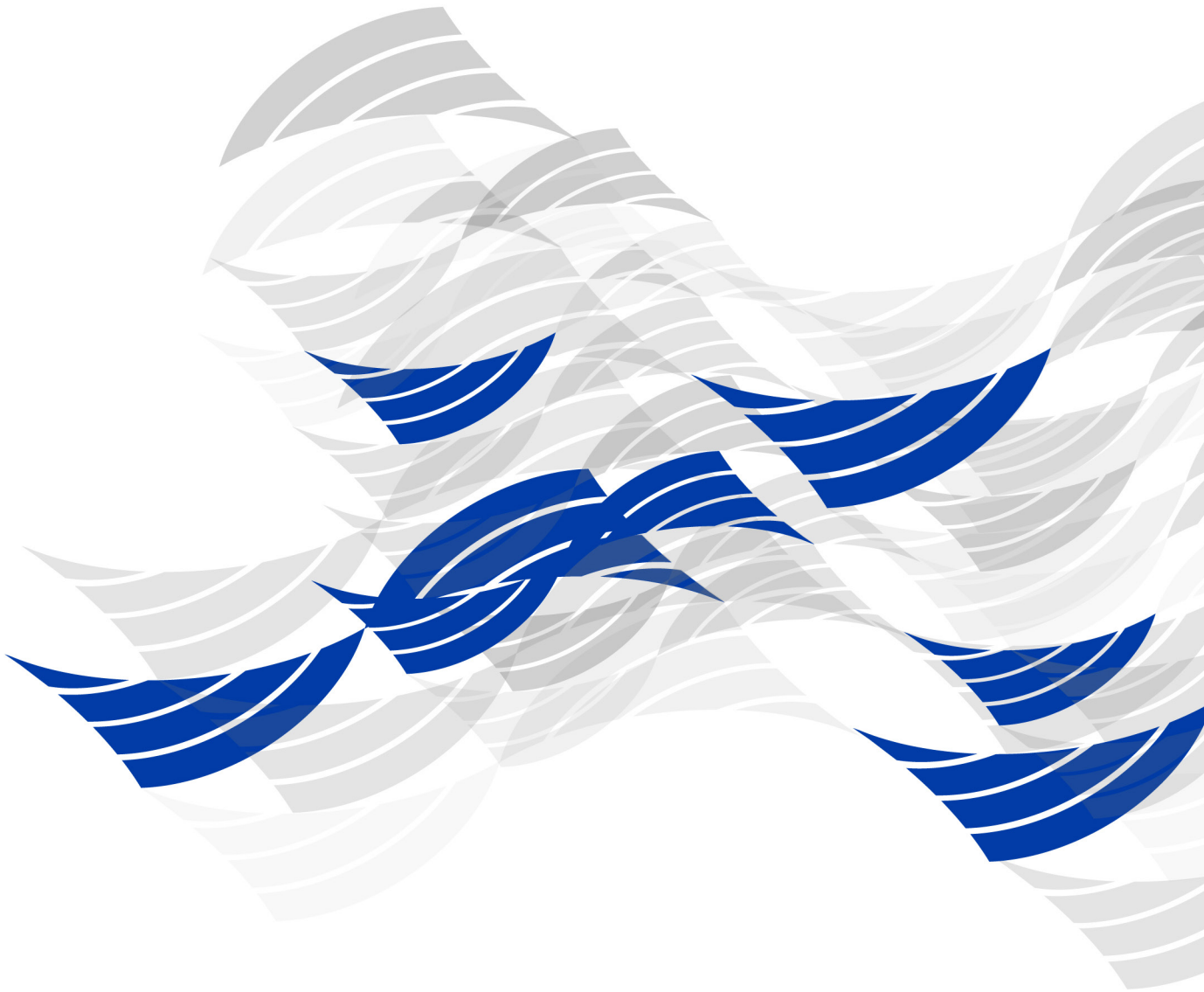
<sup>40</sup> Dotlich, Noel, and Walker, 79.

<sup>41</sup> See also Clemson Turregano, *Delegating Effectively: A Leader's Guide to Getting Things Done*, 1 edition (Place of publication not identified: Pfeiffer, 2013).

<sup>42</sup> Cf. Vijayan P. Munusamy, Marian N. Ruderman, and Regina H. Eckert, "Leadership Development and Social Identity," in *The Center for Creative Leadership Handbook of Leadership Development, Third Edition*, ed. Ellen Van Velsor, Cynthia D. McCauley, and Marian N. Ruderman, 3 edition (San Francisco: Jossey-Bass, 2010); Robert G. Lord and Rosalie J. Hall, "Identity, Deep Structure and the Development of Leadership Skill," *The Leadership Quarterly* 16, no. 4 (August 2005): 591–615, <https://doi.org/10.1016/j.leaqua.2005.06.003>.

<sup>43</sup> Accessibility of programs emerged as a strong theme that merits further attention.

<sup>44</sup> "Leadership Development: A Strategy Emerges, Investments Are Made," *Leading Edge* (blog), October 25, 2017, <https://leadingedge.org/leadership-development-strategy-emerges-investments-made/>.





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