

## 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*

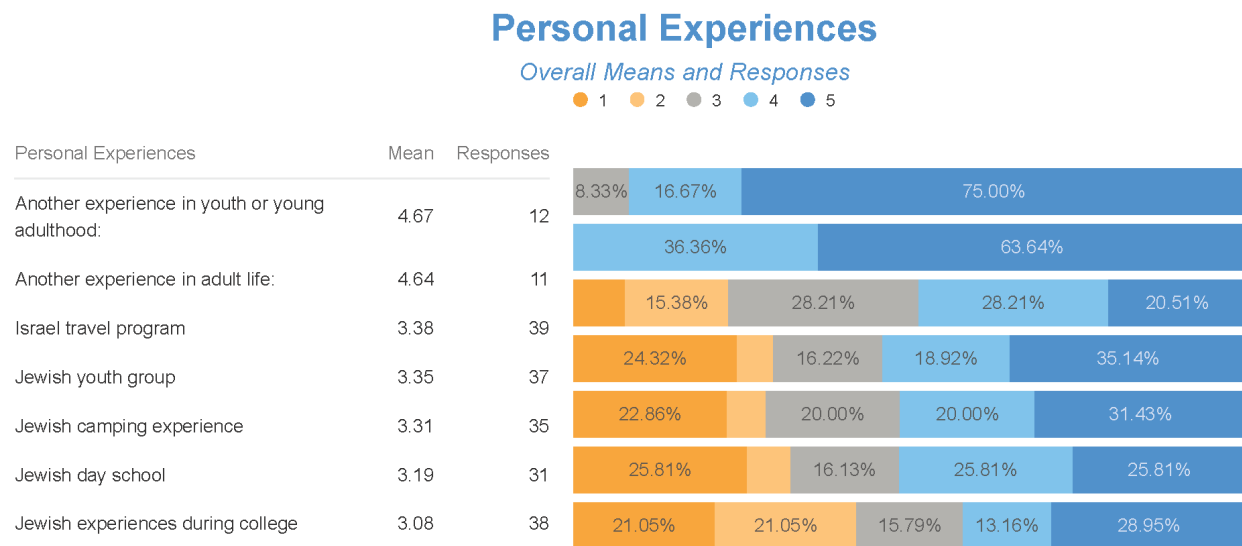
While the aforementioned themes emerged from the group coding work, we also wanted to learn more specifically about interviewees’ perspectives on their experiences as understood through the LoE interpretive framework. This framework looks at the influence of key developmental experiences across several 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.)

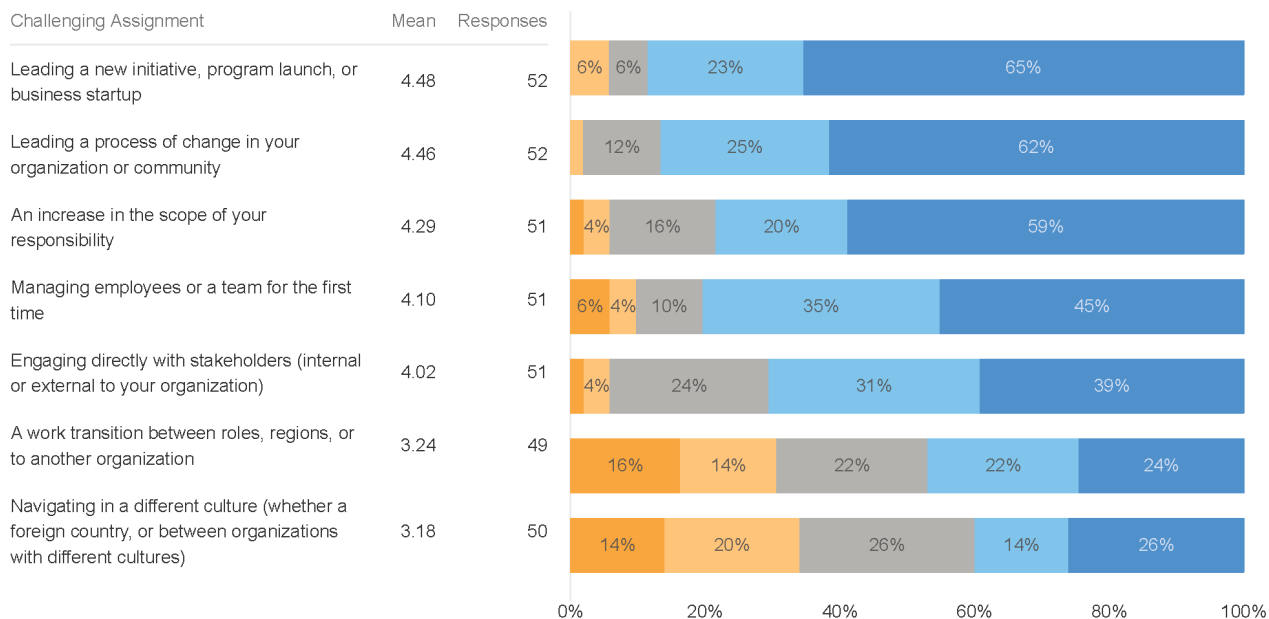


Of those experiences ranked by more than half of the participants, the most influential personal experiences were Jewish youth groups, camping experiences, and day school experiences. For those listing other experiences in adult life (N=11) common experiences referenced family, parenting, and spousal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

## Challenging Assignments

Overall means and responses

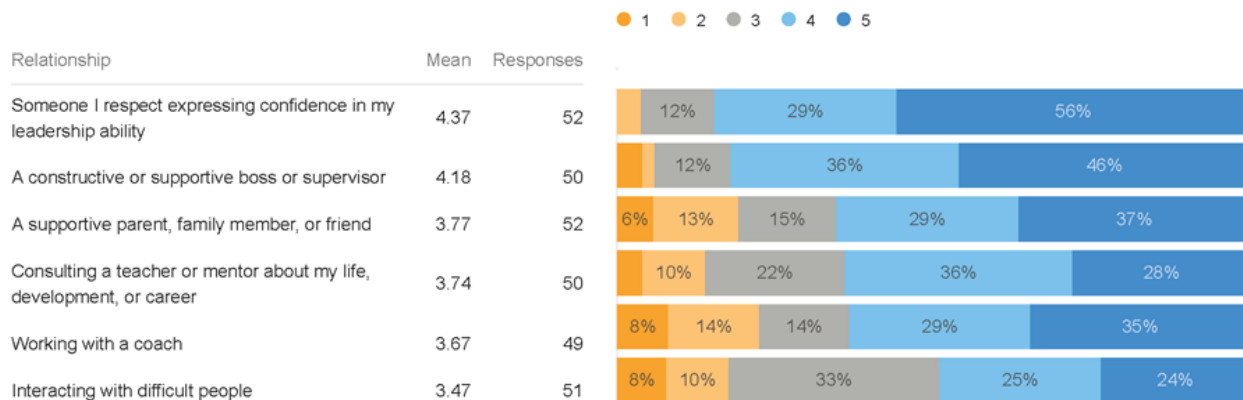
● 1 ● 2 ● 3 ● 4 ● 5



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

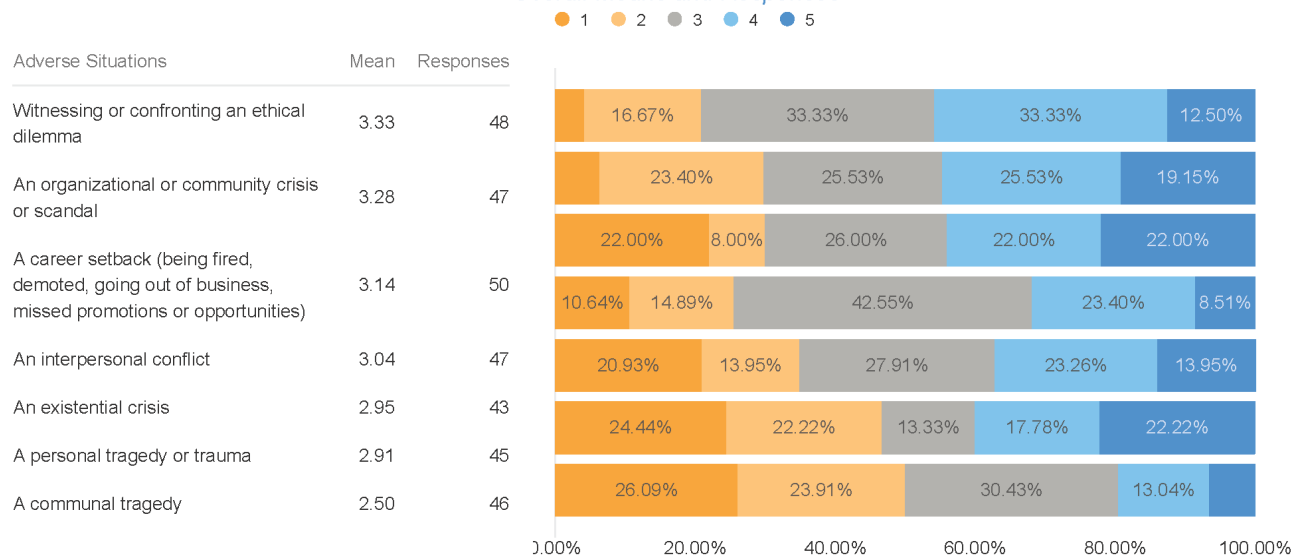
Overall means and responses



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

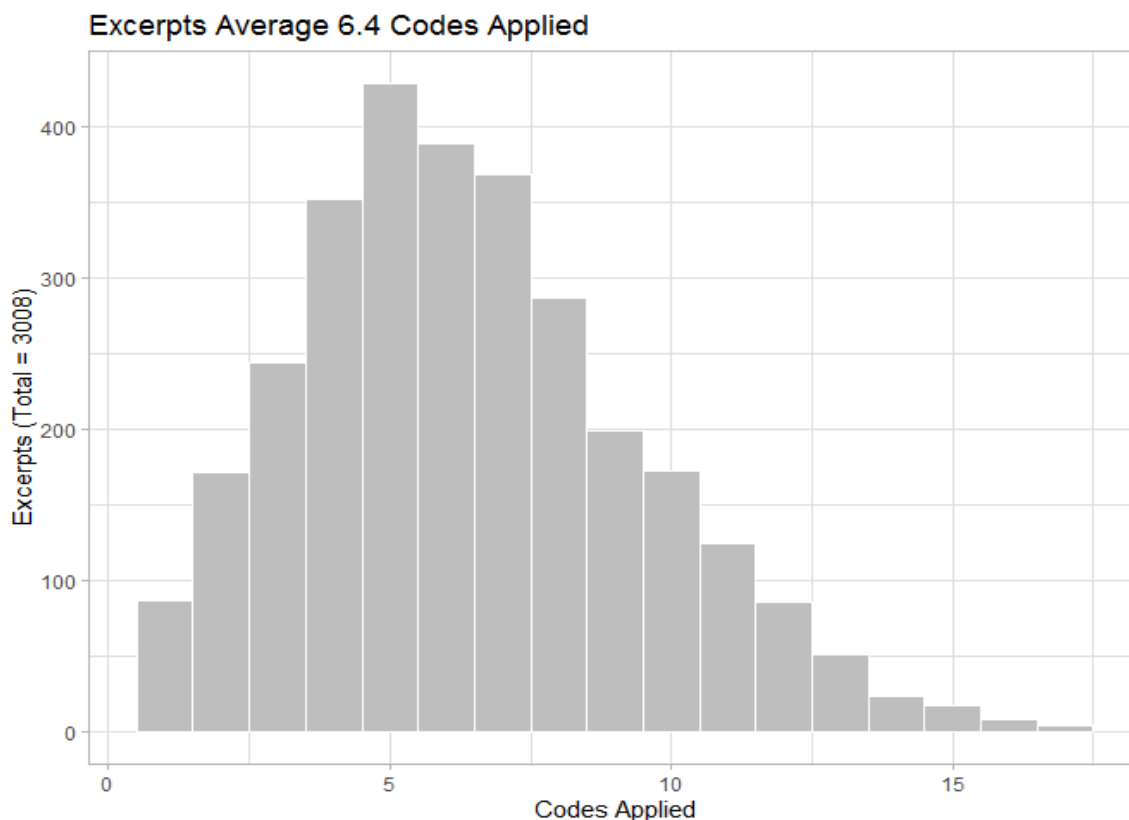
The Lessons of Experience style interview was originally proposed for this study because of its ability to capture the developmental journey of leaders and situate it in the context of their personal, organizational, and societal contexts. CCL researchers pioneered the method in the 1980s and critical 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.