



Cross-Portfolio Research Study

Prepared for the
Jim Joseph Foundation

May, 2019

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EXECUTIVE SUMMARY

Introduction

On behalf of the Jim Joseph Foundation, the Center for Creative Leadership is conducting a cross-portfolio research study of leadership development in the American Jewish community to support Jewish learning experiences. The Foundation defines Jewish learning experiences broadly as “experiences that draw upon Jewish wisdom, values, practices, culture, traditions and history to engage people in activities that guide them towards living more connected, meaningful and purpose-filled lives.”¹ The primary research questions guiding this study can be paraphrased as follows:

1. How have Jewish leaders developed through opportunities and learning experiences?
2. What are best practices for leadership development in the Jewish community?
3. How can understanding the learning journeys of Jewish leaders and state of the art practices in leadership development inform strategies to achieve greater impact through investment in leadership development in the Jewish community?

This literature review represents our first step to exploring these complex questions by researching the distinguishing features of Jewish leadership and highlighting the current day challenges faced by Jewish leaders.

How to read this document

This summarized literature review addresses the first stage of our broader cross-portfolio research study on leadership development in the Jewish community. In this stage, we explore how Jewish leadership discourse developed through works published within the last several decades. This allows us to ground our research in knowledge established by earlier experts. Naturally, this results in the literature review including some content that may seem outdated to contemporary readers; however, there is value in reflecting on how the discourse has changed over time and on how our current historical moment influences our reading of earlier sources. As we revise this literature review through the research

process, we intend to include more perspectives by expanding the focus of our review to contemporary media beyond academic and other formally published works. Readers should approach this summary as a brief presentation of what we have seen so far as significant trends in the literature on Jewish leadership, and not necessarily as indicative of what directions our research may take us as we move forward to the next stages.

Our literature review has helped us to ground our research and identify some key themes. In the next stage of our research, we will explore those themes –and discover new ones– through interviews with a diverse range of Jewish leaders. We will also observe several different Jewish leadership development programs and review the latest research and practices in the field of leadership development. Finally, we will explore connections and interrelationships within the Jewish nonprofit sector through network research and analysis. Our literature review was mostly directed toward understanding the past, but the research that follows will seek to understand the present and look toward the possibilities of the future.

Literature Review Summary

Our literature review identified several themes about the nature of Jewish leadership and the leadership needs of the contemporary Jewish community. It is clear even from classical literature that the heritage of Jewish tradition includes a robust vision for a distinctly Jewish style of leadership.

Although it may not always have been the historical reality, the model of Jewish leadership idealized in the literature is collaborative by design and intentional about circumscribing the authority and power of individuals in order to hold space for a plurality of views. This does not mean that all opinions are met with acceptance or that one opinion will never be elevated to the exclusion of others, nevertheless, the process of learning communally through debate is a cherished Jewish tradition. Furthermore, political or worldly authorities are not necessarily the voices of intellectual or spiritual authority in the eyes of various communities, therefore diversity of thought and practice can naturally be expected.

The competencies for effective Jewish leadership are similar to those needed for leadership anywhere; however, the contemporary contexts and circumstances of Jewish communities are unique, and the most critical leadership needs at this moment are those that will enable Jewish leaders to address the challenges of the day and prepare for the future. The literature and contemporary discourse point to five categories of challenges as highly significant.



The first category is **polarity challenges**. Polarity thinking is about navigating a set of two qualities that are both beneficial, yet they exist in tension with one another.² For example, an organization may need to experience stability and change at different times – and in different ways – to be successful. Managing that tension effectively can be challenging, because the most appropriate response to a specific circumstance might be an expression that favors one or another of the pair – maintaining a simple balance between the two might be impossible or undesirable.

It is also important to differentiate between the principles of *balance* or *moderation* and *polarity management*. While balance is about seeking to accommodate conflicting interests through a stable

solution or middle ground, polarity management is about intermittently shifting between alternative modes which are naturally in tension with each other. The principle of moderation can be thought of as a rowboat, where efforts are balanced between both sides to keep moving forward on a stable path. On the other hand, polarity management is more like sailing: in response to the changing winds and waves, a central path may have become impossible to hold. Instead, the sailboat shifts direction completely, but not permanently, between turning left and right. The directions are opposed, but the end result is that the boat continues forward almost as if it had kept to a direct path. The principles of balance and of polarity management are each suited to different contexts.

An example of a polarity discussed in the literature is the cultural shift within the American Jewish community over the last several decades from an orientation that prioritized institutionalization, consolidation, and security to one of diversity, innovation, and exploratory risk-taking. Another example is the tension between striving to offer free programming and relying upon membership or other fees to achieve organizational stability. Each approach can have distinct benefits, but if taken too far, predictable downsides can also manifest: The free program may not be able to scale to meet demand, or fees may become prohibitively expensive for some who would like to participate. While one approach might be to let economic forces drive the agenda to an appropriate price point that satisfies the majority, leaders approaching the issue from the perspective of polarities might instead seek opportunities to provide both paid and free options. They might charge fees for only some programs, use pricing tiers, or associate fees with the value of charitable giving to subsidize others who would otherwise be unable to afford the program. A third example is the tension between quantity and quality. In program design, this tension can manifest as an apparent choice between designing a program with the intention to reach the largest number of participants and focusing efforts on providing a profoundly impactful experience.

The unresolvable tension between the two alternatives in a polarity lends itself to a pattern of swinging back and forth between the two poles. A leader who is attentive to this dynamic can manage polarity tensions effectively by harnessing their energy to drive productive change. Importantly, Jewish leaders will need to understand the potential value of each orientation and have the skill to manage polarities without allowing either orientation to become extreme.



The second category, **community challenges**, relates to developing and maintaining a communal sense of Jewishness that appreciates rather than conflicts with the reality that individual expressions of Jewish identities will continue to diversify and adapt to changing times.

Jonathan Woocher warned in 2005 that “American Jewish life will not flourish if Jews do not continue to regard themselves as part of a religiously and ethnically based polity.”³ When the 2013 Pew report titled “A Portrait of Jewish Americans” was published, it detailed changing trends in thinking about the nature of Jewish identity, in social practices such as intermarriage, and in affiliation with Jewish institutions. For example, the report found that religious affiliation with Judaism among American adults had decreased by 50% since the 1950s, and the number of Jews describing themselves as having no religion had grown from 7% to 32% in the same period.⁴ Jonathan and Meredith Woocher later summarized the shift by remarking that “American Jewry has gone from being an ‘assimilating’ community to a fully assimilated one – but without the disappearance of a distinctive Jewish identity that some predicted.”⁵

At the same time, the literature reflects a growing recognition that the time for speaking of Jewish identity in the singular is over and was perhaps never accurate. Jewish identities today are complex, plural, simultaneous, and can change according to shifts in social context. It is increasingly common for Jews to experience affinity with identities other than their Jewishness, even when they simultaneously regard Jewish identity as important. Among Jews today, there is a growing trend to not only exercise choice in whether and how to be Jewish, but also to choose and prefer affiliation with multiple identities simultaneously. Jewish identities today might include modes of being Jewish that are grounded in religious belief or observance, ethnicity, cultural affinity, or something else. Embracing pluralism will be a necessary step toward fostering cooperation across identity groups and mitigating the rise of tensions or friction among groups with differing expressions of Jewish identity. Navigating these challenges will require visionary leadership that inspires Jews to focus on areas of shared concern, such as the pursuit of one or more meaningful purposes, common values, or care for the wellbeing of the community.



Education challenges are closely related to the diversification of Jewish identities. “Jews, like others, are exhibiting increasingly idiosyncratic configurations of Jewish identity. Religious individualism, privatization, and the phenomenon of ‘personalism’ characterize an increasing number of Jews.”⁶ It has long been established that a one-size-fits-all approach to education will not be successful in impacting Jews with increasingly personal needs, interests, and priorities.⁷ Individuals must make choices about how to allocate their limited time and attention while engaging with multiple aspects of their own personal identity. People have busy schedules, and not every Jew will necessarily prioritize engaging with Jewish aspects of their identity above their possibly multitudinous other interests and worldly concerns. An after-school program offering experiential learning experiences for Jewish youth must compete for that time against alternatives such as soccer practice or any other after-school activity, and facilitating any of those activities for youth may reduce the time available to Jewish parents for participation in Jewish educational activities serving adults or families.

To compete in this busy social context, Woocher and others have argued that Jewish education must appeal to the needs and priorities of individual learners. By integrating Jewish learning with learning and activities that are simultaneously relevant to other aspects of the learner’s identity, Jewish education can be the more appealing choice by providing a greater benefit and return on the learner’s investment of time. Since this will require Jewish education to take on a number of novel approaches and forms, Jewish communities will need to reconsider what the field of Jewish education looks like to include a far greater range of program types and activities.

The Jim Joseph Foundation holds an expansive notion of what constitutes Jewish education or Jewish learning experiences, describing them as “experiences that draw upon Jewish wisdom, values, practices, culture, traditions and history to engage people in activities that guide them towards living more connected, meaningful and purpose-filled lives.”⁸ Creating the opportunities for those experiences is not uniquely the job of a teacher; Jewish education comes about through an interconnected ecosystem of individuals playing a variety of roles, including learners of all sorts, teachers and experience facilitators of all sorts, organizers and professionals who support their work, managers, administrators, executives, board members and volunteer board members, and philanthropists, not to mention countless partners

doing related work. In a sense, people serving in all of those roles have their parts to play in facilitating and participating in Jewish education.



The **professional challenges** confronting Jewish leaders today are similar to non-Jewish leaders working in social sector organizations. These include retaining top talent, building a leadership pipeline of successors, consistently offering attractive employment opportunities, and preparing Jewish professionals with the skills and resources needed to succeed and advance into leadership roles.

Recent research on the expectations of Millennials entering the workforce has found that they are often driven by a sense of mission or purpose, and want to feel that their work makes a positive contribution to society.⁹ However, they are also seeking working environments in which they will find workplace flexibility and opportunities for collaboration, meaningful coaching in the form of support and feedback without micromanagement, and competitive structures of compensation.¹⁰ A similar pattern of career priorities has been observed among emerging Jewish leaders. They can be “quite driven and willing to take on challenging roles, but not in organizations with rigid cultures that lack collaboration, innovation, and autonomy.”¹¹ A supportive workplace culture would improve the value proposition for potential talent in the Jewish social sector. Overwhelmingly, “the next generation of leaders are not choosing to work in the sector altogether. They pointed to issues such as steep hierarchies and bureaucratic cultures, little autonomy for junior and mid-level staff to take risks and feel ownership over their work...”¹² Research conducted by Leading Edge identifies five factors as especially significant in retaining talent: “trusted leaders, common purpose, respected employees, talent development, salary and benefits.”¹³

Meeting these challenges will require building meaningful professional development and leadership development opportunities into every facet of Jewish organizational work. Providing on-the-job talent development has been highlighted repeatedly in research for its potential to uplift the sector. One critical skillset to be developed by nonprofit leaders at any level is general familiarity and facility in navigating the nonprofit sector, and particularly how to achieve excellence in nonprofit governance as well as organizational operations and management.

Field-wide collaboration has also been suggested as a means to provide shared resources for mentorship and coaching to uplift leaders. Several specific proposals have focused on the need for network-level interventions, which would require broad cooperation among organizations to be successful. An example would be supporting “a training program for mentors” or “a ‘Chief Talent Officer’ who could provide shared services to multiple organizations and help the community think strategically about identifying and cultivating top talent across the field.”¹⁴ These proposals suggest that the sector should develop leadership strategically as “a system-wide capability, not an individual personality trait.”¹⁵ Fostering organizational cultures dedicated to talent development can drive a range of positive outcomes, and a coordinated focus on talent development could also produce ripple effects that profoundly benefit the sector in the short and long terms.



All of the above are also critical **network challenges** because meeting all of these challenges is beyond what can be expected of any single organization. The importance of leadership across boundaries is not limited to denominational boundaries and organizational functions. Maximizing the success of a widening range of organizations will require “a commitment to interdependence that goes well beyond platitudinous expressions of one-for-all-and-all-for-one.”¹⁶ It will be imperative to develop new network-oriented systems and practices that facilitate field-wide collaboration.

The boundary spanning work needed to address network-level issues will depend upon bringing together the full range of diverse stakeholders. Therefore, building positive relationships among leaders in different roles and across a variety of organizations is a necessary prerequisite to building a more supportive shared Jewish organizational ecosystem. Boundary spanning, role clarification, and professional training can reduce the friction that often occurs between professionals and lay leaders. This is especially critical because conflicts among leaders can not only derail individuals, but also stunt the growth of organizations, divide communities, and give the impression of a toxic environment that makes working in the sector unappealing to young Jewish professionals.

A focus on boundary spanning is in alignment with the Jewish model of collaborative leadership, and it is supported by the latest thinking on distributed network leadership and collective impact. A successful Jewish boundary spanning leader will be able to reach out “to the left, to the ‘new age’ Jews, to the marginal and oppressed Jews... toward the Federations and... toward the established activists and the mainstream rabbinate.”¹⁷ A community-centered approach to boundary spanning is not unusual. “In today’s most effectively run enterprises, teamwork is nurtured, information transfer is enhanced, and networking is expanded because of a systematic commitment to shared leadership.”¹⁸

Successful boundary spanning interventions to foster mutually beneficial interdependence will depend upon leaders who are able to see the bigger picture and take on the role of “ecosystem engineers.”¹⁹ They will need to be “collaborative boundary spanners, who will emphasize broad concerns and community building rather than institutional preservation.”²⁰ Their role will be to develop “systems of shared power [that] incubate creativity across a variety of institutional silos and create invested stakeholders and constituents.”²¹ An important ecosystem or network-level boundary for Jewish leaders to span is the divide (or popular impression of a divide) between legacy institutions and innovative start-ups. Legacy institutions can benefit start-ups through their well-established networks of support and long term thinking and experience, while startups can benefit legacy institutions through their energy and agility in testing new approaches and their ability to reach Jews who do not affiliate with larger institutions.

Field-wide network analysis studies that map relationships among leaders, organizations, goals, and resources will be an instrumental first step to provide Jewish ecosystem engineers the information they can use to identify high potential impact initiatives and synergistic collaborations that stand to benefit the field as a whole.

Conclusion

This executive summary outlined five key leadership challenges within the American Jewish community. We explored a rich history of writing on Jewish leadership and paired that with current thinking in leadership development to create these five themes. Our subsequent research, consisting of interviews with over 75 Jewish leaders, will explore how these challenges manifest and what learning experiences best equip leaders to navigate these challenges.

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ENDNOTES

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