

EXECUTIVE DEVELOPMENT & SUCCESSION PLANNING:

A GROWING CHALLENGE FOR THE AMERICAN JEWISH COMMUNITY

PREPARED FOR
**THE ANDREA & CHARLES
BRONFMAN PHILANTHROPIES**

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EXECUTIVE DEVELOPMENT AND SUCCESSION PLANNING

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Dear JFN Member,

WE ARE PLEASED TO SHARE THIS

monograph, Executive Development and Succession Planning: A Growing Challenge for the American Jewish Community, with you. This research, funded by the Andrea and Charles Bronfman Philanthropies, analyzes a vital issue facing our community: in the next ten years, a critical mass of executive leadership of Jewish community agencies will retire. The research began as an effort to design a professional development program to respond to these changes—but in the course of the work, additional challenges were revealed that offer potential guidance for interested funders.

We are grateful to ACBP for developing and disseminating this research. As other foundations conduct research, sharing results across the Jewish world can offer insights to other funders so together we can more effectively confront complex problems that face our community.

We salute ACBP's willingness to share their work product with the field and we look forward to sharing additional research in the years to come.



Mark Charendoff
President

INTRODUCTION

THE NATIONAL JEWISH COMMUNITY

appears to be on the edge of a precipice. Within the next five to ten years, the baby boomers will retire and leave upwards of 75%-90% of Jewish community agencies with the challenge of finding new executive leadership. The field of Jewish communal service is vastly different today from the post-Holocaust creation of the State of Israel when hundreds of young Jews decided to dedicate their professional lives to the Jewish community. When this reality is combined with the rapid technological advances, the professionalization of the field, the increasing demands of community executives and the rapidly changing needs and culture of the Jewish community, the challenges are monumental and uncharted.

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This study was designed to respond to this crisis, namely, finding future professional leadership and preparing them to meet the changing realities of our Jewish communities.

Leadership succession has become a topic of national concern to lay leaders and national organizations alike. The competition for talent has intensified to such an extent that some of our “best and brightest” are forced to re-evaluate their commitments to Jewish communal work based on the high cost of Jewish family life and the problematic working conditions reflected in Jewish communal organizations.

This environmental scan of national and local Jewish communal organizations had three objectives:

- **Develop a national profile of continuing professional education programs;**
- **Develop a national profile of the capacities of national and local organizations for supporting the development of mid-career professionals who have been in practice for approximately 10 years and are in the age cohort of roughly 35-45; and**
- **Develop a set of recommendations related to strategies for identifying the needs/interests of the target population, identifying promising mid-career training programs in other related fields, and promising training/coaching strategies.**

While the original purpose of the study was to develop recommendations for the design of a national program of professional development for mid-level managers in nonprofit Jewish communal organizations, the training of mid-level managers is just one aspect of the work ahead. This study revealed three challenges:

- **Identifying the visionaries within the Jewish community with the capacity to carry out and guide change (and how to best prepare them);**
- **Acknowledging that there is not a sufficient talent pipeline within the Jewish community and the need to bring in and train stars from other fields; and**
- **Addressing the current environment found in Jewish communal agencies specifically looking at work/life balance and lay/staff relations that are contributing to the loss of talented Jewish communal professionals from the organizations most in need of their leadership.**

METHODOLOGY

IN ORDER TO UNDERSTAND what is happening in the national Jewish community, 59 interviews were conducted with representatives from 50 agencies including: a dozen umbrella national agencies, local Federations, Jewish Family & Children's Services, Jewish Community Centers, as well as with other Jewish agencies, including Jewish Homes for the Aged, and Jewish Vocational Services. In addition, a number of experts in the field were interviewed to help round out the findings and enhance recommendations. A list of those interviewed is located on page 35.

The evolution of the interview process was fascinating unto itself. The initial set of interview questions included the following:

- What types of training does your organization provide for staff?
- What types of training work best for your staff (e.g., mentoring, coaching, workshops, webinars, etc.)?
- Do you have training for lay people (anything jointly with staff)?
- Do you have an executive succession plan in place and if so what does it look like? Have you heard of any plans that are particularly good?
- Why do people leave your organization to work some place else?
- If you were the Executive Succession Planning Guru, what type of program would you create?

The interview was structured to last 15–20 minutes in order to minimize the time demands on these busy executives. However, to our surprise, the interviews typically lasted an hour to an hour and a half and quickly turned from professional development to the philosophical issues related to executive succession. The questions on professional development evolved from a focus on all staff to a focus on professional development for “up and coming stars” and the concerns about the perceived dearth of talent on the horizon. Some of the most interesting comments were in response to what executives would want to see in an executive succession program if they had been anointed the “Executive Succession Planning Guru.” The time investment given to the interviews was much greater than what we had anticipated; giving testament to both the urgency of the issues and the participants’ dedication to the Jewish community.

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Of the national umbrella organizations sent a request for an interview, 100% participated. Those national organizations participating in the survey included:

Association of Jewish Aging Services
Association of Jewish Communal Service
Association of Jewish Family & Children's Services
B'nai B'rith Youth Organization
Hadassah
Hillel
International Association of Jewish Vocational Services
Jewish Community Centers Association
Jewish Council for Public Affairs
Jewish Education Services of North America
Jewish Funders Network
United Jewish Communities

Many of these national organizations also provided information to contact their local affiliates in major urban areas. While the focus of this study has been primarily on large community agencies, the issues identified throughout this study are compounded in small communities. Many small communities are reliant on one or two donors and board members who have retained control of agencies without bringing forward the next tier of leadership. These communities are particularly vulnerable. It is important that small communities be included in the discussion as their need for talented executives will be as great, if not greater, than those of larger communities.

A critical challenge is that while long-time board members and volunteers understand the ethic of giving, many of the next generation do not. Groups like the Jewish Funders Network are reaching out to this next generation, but there has yet to be an integration of these new efforts with traditional federation community efforts.

In addition to the use of interviews, the literature on nonprofit management was reviewed and graduate programs on Jewish communal services were surveyed. As noted in the *Review of the Literature* (see page 36), the bulk of the literature on nonprofit management focuses on pre-service issues for students entering the field and very little attention to in-service training for those already employed. In a similar way, the vast majority of graduate programs in Jewish Communal Service (see page 60) are devoted to professional education for those entering the field with little or no attention to in-service programming. This review confirms the general perception that nearly all in-service education is in the hands of national and local Jewish communal organizations.

While not a specific question in the interview, it was repeatedly noted that the number of professionals coming from social work and schools of Jewish communal service is insignificant today. While there are still idealistic college graduates entering the field, the vast majority tend to stay for 18 months to two years and then move on to gain more experience elsewhere. The desire of previous generations to devote a lifetime to Jewish communal service is rapidly disappearing.

EXECUTIVE DEVELOPMENT: WHAT CURRENTLY EXISTS?

FOUR OF THE NATIONAL AGENCIES have executive development programs as reflected in the following highlights:

HILLEL

- Executive succession and recruitment is now a key component of the HR director's job.
- A New Directors Institute is aimed at training new Hillel Directors. The Directors are then assigned a coach for 18 months.
- Uniform "Success Factors" for Hillel Directors have been developed. This provides the framework for training and evaluation.

BBYO

- Professional development is a key institutional priority. 16 employees are earning their MBAs with a certificate in Jewish Education curriculum while working with BBYO. The program is fully funded by BBYO.
- The program is privately funded and costs \$30,000 annually per participant.
- Employees who are in the program must commit to two years of Jewish communal service within any Jewish organization.

JCCA

- Operates the longest running executive development-training program (EDTP), and some years the program has been more effective than others for a total of 107 participants in seven different sessions (69% of the participants were promoted within the JCC field).
- Developed an Excellence in Leadership and Management program, the goal of which is to provide consistent management training and to develop a benchmarking process (in the third year of pilot involving over 40 different JCC's).
- Operates a First Time Execs program where the new executive is assigned a mentor and receives intensive support for a period of time.
- Currently has a task force addressing executive succession given the large percentage of retirements projected within the next 10 years.

UJC

- The Mandel Center for Executive Development Program provides extensive consultation for Federations as well as:
 - a two-year program of 20-25 candidates who are being trained to be future federation executives.
 - The FEREP program that provides subsidies to college graduates for advanced degrees in Jewish communal service.

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■ Uses a consultant to develop “S” planning

(Strength, Success and Succession):

- Looking at who are the star players, who is at the top and who in the middle who should be moving up;
- Developing a strategy for executives to help staff strengthen their skills; and
- Developing a review process and beginning succession planning based on success factors.

The questions related to professional development generated a vast array of responses that often referred to the size of staff development budget and administrative capability. Out of the 50 agencies responding to this question, 77% support sending staff to conferences, 20% have funds to support continuing education and 50% have regular in-service training activities. A small number (26%) do little beyond brief orientation sessions. Again, this is not out of a lack of interest but more out of a lack of sufficient financial support.

Many of the executives noted the importance of community sponsored training and those training activities done by their national agencies. The effectiveness of these training activities is inconsistent, however, and is primarily important for networking among colleagues.

EFFECTIVE TRAINING MODELS

PARTICIPANTS IN THE SURVEY were fairly unanimous in their views of important professional development components:

- **DIDACTIC TRAINING:** Everyone learns differently. Some prefer a classroom, some reading and some individual one-on-one coaching. Any successful training program needs to be tailor-made for the individual.
- **EXECUTIVE COACHING:** 100% of the participants noted that executive coaching is the single most effective mode of training. As long as one has the right coach, the training can focus on those areas where individuals need the most support/learning.
- **PEER SUPPORT/LEARNING:** 75% of participants noted the importance of peer or cohort support and training. While everyone attends conferences, few gain new knowledge from the sessions. The greatest gains come from the establishing of trusting relationships, where one can confer, brainstorm and problem solve.
- **SUPERVISION:** For up and coming stars, the importance of strong supervision was noted repeatedly. This was also listed as an area of weakness. It was generally recognized that many staff who leave an organization do so out of frustration born from unclear job expectations and weak supervisors.
- **UNIVERSITY AFFILIATION:** Those who have had programs in conjunction with a university have had both increased success and increased reception. Boards are more receptive because of the esteem in which universities are held and the participants focus more intently because of the demands of an academic setting.

THE TALENT PIPELINE

About 25% of the executives were able to identify “up and coming stars” who would be able to take over the reigns of running the organization. The vast majority, however, said that they did not know where the next generation of executives would come from.

“The vast majority of those interviewed said they did not know where the next generation of executives will come from. They don’t see the talent in the community.”

The Executives with senior management teams were the ones who have been thinking about and planning for an executive succession transition. By developing stars and increasing their responsibilities, the executives are able to train a likely successor, without expressly identifying one. This both enhances the professional development of all of those involved as well as takes the burden off of one person.

At one agency, a clear successor was identified and a yearlong period had been invested in his training and development. Before the executive retired, however, the star was snatched up by the local Jewish federation, leaving the agency board frustrated and angry.

In addition, they are now having to do a traditional search when they had planned on hiring someone from inside the agency. This was perceived as a waste of time and resources. On the other hand, the fact that the star did not leave the Jewish community is also important to note.

Respondents frequently recommended that there be a concerted Jewish community effort to bring in talented individuals with diverse training from outside the Jewish community. Only one or two of the agency executives felt that it is imperative to hire from within the Jewish communal world. The others stated that, while that would be ideal, the pipeline simply is not there and the community has no choice but to look outside.

It was unanimous that the Jewish community should try to hold onto the notion that their CEOs should be Jewish, but there is also recognition that it may not be possible, especially for Jewish Homes for the Aged and for JVS and JF&CS—those organizations that serve Jews and non-Jews alike.

WORKPLACE ENVIRONMENT

EMPLOYEE TENURE

Employee turnover at the senior management level was perceived to be minimal. According to the executives interviewed, the average tenure of their senior management is between 20-30 years. This means that not only will the top executives be retiring within the next 10 years but so too will the associate directors and other members of the management team, thereby producing an even larger leadership vacuum.

“Not only will the top executives be retiring within the next 10 years, but so too will the associate directors and other key members of the management team.”

For many, the most important issue was the loss of the “up and coming stars,” who leave to earn higher salaries and/or gain greater responsibility. The lack of a significant talent pipeline was noted time and again.

Many organizations have senior management and entry-level positions. Without a clear path of progression, many recent graduates simply learn what they can in 18-24 months and then move on. Only one executive noted the influx of young graduates focused on a career in Jewish communal service. In point of fact, most executives noted the loss of that career track and that the expectation of remaining in one profession, let alone one agency, is long gone.

It is interesting to note that of those who responded to the demographic survey, only eight had started out wanting to dedicate themselves to the Jewish community. The vast majority began their careers in Jewish communal service, not thinking that they were making a life-long commitment and yet once in, they never left.

While the primary issues with regard to employee satisfaction are salary and responsibility, other important issues were identified:

- **WORK-LIFE BALANCE:** A number of executives noted that the stress of being in the CEO position was not one that many aspired to. Increasingly, they see professionals who do not need the status of the CEO position and would rather not have the headaches.
- **ENVIRONMENT:** It is clear that not everyone is suited to the stressful environment of a JCC or a Federation. The overtime, deadlines and pace of the agencies can be too intense and lead to burnout.

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- **SUPERVISION:** A lack of clear roles and responsibilities, feedback and knowing what is expected was another reason cited for employee departure. There is an increasing awareness of the importance of quality supervision and the training required to ensure that supervisors know how to supervise.
- **LAY-PROFESSIONAL RELATIONSHIPS:** The dynamic of the lay-professional relationship is a critical one. Those who come from outside the field do not always want to have more than one supervisor, and for others the politics of the organization and the lack of perceived respect of professionals by lay leaders make some Jewish organizations less attractive.
- **GENDER INEQUITY:** In 2001 Advancing Women Professionals and the Jewish Community (AWP) was founded to address the ongoing gender inequity prevalent in the highest levels of professional Jewish leadership. As Steven M. Cohen is quoted in “Leveling the Playing Field” (by Shifra Bronznick, Didi Goldenhar and Marty Linsky, 2008), “Women are absent, or nearly absent, from the most influential, prestigious and best-compensated jobs in the system: the executives of large and large-intermediate communities.” Breaking through the glass ceiling has to date been a moral imperative. At this point the community must break through this barrier to ensure that the talent pipeline is exhaustive.

LAY-PROFESSIONAL RELATIONS

Lay-Professional relations represent a complex relationship and one that the executives acknowledge but rarely deal with effectively. For example, 64% of the respondents said that they do little if any training for lay volunteers beyond the basic board orientation. This percentage may be even higher because some respondents noted that an orientation and Jewish education session was sufficient training.

While many executives have good relationships with their lay leadership, not everyone does and this is an area filled with angst when the organizational mission and Jewish values come into conflict. Some of the most critical issues include:

- **Jewish values are not necessarily present in Jewish agencies; there is too much focus on those with money and a disparate treatment of those involved in the community.**
 - Lay leaders have a sense of entitlement and are often abusive to staff.
 - Sexism is alive and well with men and women being treated differently.
- **Some organizations lack a clear vision.**
 - Staff gets blamed when systems do not work and it is perceived to be easier to replace staff or re-organize than it is to face the issues.
- **Jews and Jewish community have difficulty dealing with perceived failure/mistakes and professionals are often blamed. Lay people often get the credit when things go well.**
 - Lack of respect for professionalism and ideas.

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The lay-professional relationships appear to fall within one of three categories:

■ **PROFESSIONALLY DRIVEN RELATIONSHIP:**

where lay volunteers are groomed to support the decisions of the professionals and have very little real authority;

■ **LAY DRIVEN RELATIONSHIP:**

where the lay leadership is so strong that very little decision-making authority is given to staff and staff may feel powerless given the potential threat of losing one's job; and

■ **INTER-DEPENDENT RELATIONSHIP:**

where there is a balanced and inter-dependent relationship based on mutual respect and shared expectations.

“A history of a lack of boundaries in the lay-professional relationship is a hallmark of the Jewish community, raising many questions for those aspiring to senior management roles.”

While board relations and composition have been evolving in many communities, many others retain an old-fashioned model of board where clarity of roles between staff and board members is blurred. In order to develop an ongoing culture of effective lay-professional, this area of work-life needs considerable attention.

The lay-professional relationship also has a profound impact on the allocation of funding to support professional development of all kinds. The “buy-in” of lay leadership is essential along with the support of the executive director.

One interviewee noted that: “A history of a lack of boundaries is a hallmark of the Jewish community. Candidates are now looking hard at the lay leadership in a way they haven’t before.”

While the majority of respondents welcomed the opportunity to share their views about the need for professional development of middle and senior managers, the real energy and excitement focused on the problems of leadership succession. Given that the majority of respondents at the community level were concerned about the continuity of their organizations, they felt most compelled to make the case for assistance with succession planning. Since no lay leaders were included in this study, it is not clear if the same sense of urgency is shared across the lay-professional relationship.

EXECUTIVE SUCCESSION PLANNING

In addition to the issues of professional development, the nonprofit community in the U.S. is facing a significant challenge related to succession planning. In 2004, an Annie E. Casey Foundation study of some 2,200 organizations found that more than 65% of them are expected to go through a leadership transition by 2009¹. The Jewish community is in varying stages of grappling with this very same issue. For example, Steve Rod and Alan Mann of JCCA surveyed 150 JCC executives and found that one third are between the ages of 55-65 and expect to retire within the next 10 years.

While many agency executives are talking about the issue and expressing concern, few have yet to move forward with a comprehensive plan due to lack of resources, time, and/or a

clear strategy on how to move forward. Out of the 50 agencies that participated in this exploratory study, only five (10%) have a formal executive succession plan in place.

Of these respondents in this exploratory study, 66% are over 55 and 90% are planning on retiring

within the next 10 years (28% within the next five years).

Some indicated that they had planned to retire within the next five years, but that the current economic crisis has pushed that back to within 10 years (“My 401k is now a 101K”).

“CEOs in organizations of any size that do not have a succession plan are not doing their jobs.”

In 2006, Bert Goldberg, executive director of the Association of Jewish Family and Children's Services, made a presentation at its Annual Conference on Executive Succession planning and described the following types of executive succession planning:

- **EMERGENCY/CONTINGENCY SUCCESSION PLANNING:** in the event of an emergency or untimely death of an executive, planning is similar to those used for medical emergencies, vacation coverage or any other unanticipated occurrences.
- **USUAL AND REASONABLE SUCCESSION PLANNING:** in the event that the executive leaves for another position, planning takes place in a shorter time period.
- **ANTICIPATORY SUCCESSION PLANNING:** in the event that the CEO announces his or her retirement, planning can include up to a year of transition and activities.

While the focus of this exploratory study was on Anticipatory Succession Planning, it should be noted that the different types of planning are interconnected and that those persons identified for Emergency Succession are not necessarily those with the skills to lead the organization in the long term.

One Federation executive noted that: "Any CEO of any good size organization that doesn't have a succession plan in place is not doing his/her job". This executive, unfortunately, was in the minority.

EXECUTIVE SUCCESSION PLANNING: THE NATIONAL PERSPECTIVE

Of the 12 national agencies interviewed, none has an executive succession plan currently in place. Approximately 30% are either reviewing or developing executive succession planning for their affiliates. 100% think that the issue is of critical importance for the community.

Respondents differentiated between training and professional development. Of the 12 agencies in the study, 91% have training programs for professional staff in the field, ranging from participating in training events at annual conferences to more intensive cohort training within agency fields of service (e.g., development directors; planning directors, etc.). Similarly, 91% offer a range of professional development services for field staff.

Nearly all of the respondents thought that the idea of a nationally supported executive succession program is long overdue and needed to address the following issues:

■ **COMMUNITY**

CHANGING COMMUNITY: Any program to be developed needs to be flexible in that the Jewish community that exists today is not necessarily the structure of the Jewish community in the future. For example, the Jewish community is likely to be less building centric in the future and may be offering services through the Internet or in satellite facilities.

■ ORGANIZATION

RAISING EXPECTATIONS: A number of executives expressed concern that there would be an expectation that the CEO would leave once an executive succession plan was put in place. Executives do not want to feel that they are being pressured to retire or leave, especially given the current state of the economy.

INVESTMENT: Concern was expressed that significant time and money might be spent on training a successor who might then get tired of waiting and leave for more immediate opportunities.

WORK/LIFE BALANCE: Many respondents raised concerns about an insufficient pipeline of individuals willing to embrace the demands and stress of being an executive. An equal number stressed that there will always be those who thrive in a demanding environment.

ENVIRONMENT: A few raised the issue of environment and lack of lay leader support. It would be a waste of funds to develop someone only to send him/her back to an environment where the lay leaders and/or the executive director do not support the development of middle and senior manager and/or do not know how to handle the implementation of new ideas.

■ PROFESSIONAL DEVELOPMENT

MENTORING & EXECUTIVE COACHING: Informal mentoring is a common way of helping new executives become accustomed to their new position and yet, mentorship has been found to be inconsistent due to time constraints and different levels of expertise. Formal executive coaching, on the other hand, was seen by respondents to be very worthwhile and an important part of any new programming for professional development. Executive coaches are paid and can be matched to the individual needs of a new executive or “up and coming star.”

LEADERSHIP & MANAGEMENT: There was strong consensus that future professional leaders need to be people with style, presence, courage, intelligence and the ability to inspire others with a well-articulated vision. A clear understanding and demonstrated skills in both leading (envisioning the future) and managing (dealing with complexity) are required. It was also noted that future leaders need a comprehensive understanding and experience in the implementation of Jewish communal services/programs.

JEWISH COMMUNAL SERVICE EXPERIENCE VS. EXPERIENCE FROM OTHER FIELDS: It was acknowledged that with an insufficient pipeline of talent within the world of Jewish communal service to draw upon, many of the next generation of executives will most likely come from other fields of practice.

EXECUTIVE SUCCESSION PLANNING: THE LOCAL PERSPECTIVE

Eight Jewish Federation executives participated in the survey, representing Baltimore, Boston, Chicago, Cleveland, Los Angeles, Miami, Washington DC and West Palm Beach. Of the Federation executives interviewed only one had an executive succession plan in place. All of the executives have been thinking about the need to develop something but the issue has not, in general, made it to the planning stage.

Nine Jewish Family and Children's Services executives were interviewed, including Atlanta, Boston, Chicago, Cleveland, Miami, San Diego, San Francisco, Seattle and St. Louis. Of these agencies, only one has an executive succession plan in place. Very few have identified possible "up and coming stars" and reflected concern about the lack of a talent pipeline.

One particular approach reflected by several respondents was the importance of creating an executive management team under the executive as a way to prepare members to step in during an emergency and to identify those for possible leadership succession. It presents a challenge, however, for the vast majority of organizations that do not have the financial capacity to hire senior level managers.

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Eleven Jewish Community Center executives participated, representing Los Angeles Westside, Baltimore, Chicago, Boston, Cleveland, New York, DC, Seattle, Cleveland, Boca Raton and West Palm Beach. Of these, three have either a formal executive succession plan or a senior management team to take over and a few have been identified as having the capacity to succeed the current executive.

Five Jewish Homes for the Aged executives (out of 12 invited) responded and none has an executive succession plan. All respondents cited the crisis in the field based on the upcoming retirements and the lack of skilled long-term care administrators who are both capable and Jewish.

EXECUTIVE SUCCESSION PLANNING: RESPONDENT RECOMMENDATIONS

In general, there was overwhelming appreciation by all participants for the opportunity to be consulted and involved in the Bronfman-supported study. Respondents appreciated the opportunity to think through the issues and brainstorm ideas. A few of the executives have tried to implement a planning process and have been stymied by their board members who prefer to think that nothing will ever change. It should be noted that there are a few executives who believe they will, in fact, live forever, but even they recognize that not everyone will.

Two distinct recommendations emerged from the interviews:

■ ASSISTANCE WITH AGENCY-BASED EXECUTIVE

SUCCESSION PLANNING: Many agency executives expressed their desire to have a coach/consultant come into their agency to help develop an agency specific executive succession plan, one that involves both the board and executive management. Each agency has its own idiosyncrasies so that a “one-size fits all program” was perceived to be ineffective.

■ ASSISTANCE WITH COMMUNITY-WIDE PROFESSIONAL

DEVELOPMENT FOR FUTURE EXECUTIVES: All but two agency executives felt that a Jewish community training program to identify and cultivate leadership would be very valuable. The two CEOs who questioned its possible effectiveness did so on the basis of their view that any training would need to be so specific to the individual that an across-the-board training would be of limited value (e.g., the management and leadership needs of professionals in family service agencies differ significantly from those of a federation).

EXECUTIVE SUCCESSION PLANNING: CONSULTANT RECOMMENDATIONS

There is clear interest and enthusiasm for the development of a program to address executive development and succession. It is recommended that a National Task Force be created to expand on the issues identified in this exploratory study and develop a set of goals and strategies to address these issues. A prospective task force agenda might include some or all of the following:

- **REFRAMING JEWISH COMMUNAL SERVICE:** Since our Jewish community is changing, how have technology and the changing needs of Jewish communities affected the expectations of future professionals? Exploring how these changes are affecting service delivery could be the first step in developing a vibrant and dynamic program for executive development and succession.
- **NATIONAL FRAMEWORK FOR IDENTIFYING TALENT:** Being able to identify stars in the Jewish community who are visionary leaders (and not just capable managers) will require special scanning initiatives. Creating learning experiences and pathways for upward mobility will be needed to increase the likelihood of talented professionals staying within the Jewish community.

- **OUTSIDE/INSIDE:** Bringing folks from outside Jewish communal service seems inevitable due to the insufficient pipeline of talent within the Jewish community to address its leadership needs. Lawyers, MBAs, and others will need to be recruited and trained on the dynamics of working in the Jewish community.
- **LAY-PROFESSIONAL RELATIONS:** A national program has the potential of developing a framework for clarifying and improving the roles for board and executive staff members. This fragile relationship is at the heart of organizational success and staff morale.
- **ENVIRONMENT:** Identifying the reasons that talented individuals are not interested in top positions is also important, especially in relationship to work/life balance. Defining the parameters of successful work/life balance could provide a framework for making Jewish communal service more attractive to future professionals interested in leadership positions.

CONCLUSION

The layers of complexity in executive development and succession planning are numerous. This is not simply a new training program that might be implemented. This is an area where “cutting-edge” minds are needed to develop a dynamic and responsive program that is flexible enough to meet a vast array of needs. Individual organizations have a responsibility for their own entities, but the emerging executive leadership crisis may require system-wide approaches. Otherwise, we will be in a continuous cycle of organizations stealing the best and the brightest from each other, without a wide enough bench to fill all the positions.

The issue of executive leadership and success clearly has an impact on the capacity of our Jewish communal systems to survive and thrive in the decades to come. We see the problem on the horizon, but have yet to find the best way to address it and we know that we must not ignore it.

NEXT STEPS

In addition to constructing and managing a National Task Force that might operate over an 18-month period, the following initiatives are worth considering in providing the Task Force members with additional research to inform their recommendations:

I. RESEARCH-INFORMED PLANNING THAT INCLUDES:

- Web-base survey of middle and senior management staff currently working in Jewish communal organizations (through Web-based technology), will help to identify workplace issues and learning needs;
- Web-based survey of lay leadership in key agencies across the country to identify lay perspectives, challenges and concerns regarding executive succession;
- A literature survey of promising practices related to executive coaching, succession planning, and peer learning. A survey of current training practices would include the identification of promising mid-career training programs in other related fields (e.g. Girl Scouts, United Way, Catholic Charities, etc.); and
- A sampling of case vignettes of the experiences of executive coaches currently operating in the Jewish community could also inform planning by the National Task Force.

II. ADDRESSING THE ORGANIZATION OF JEWISH COMMUNAL ORGANIZATIONS:

Guiding and managing organizational change has surfaced as one of the most critical skill sets needed by professionals seeking to lead nonprofit organizations. Given some of the dysfunctionality of Jewish communal organizations, the lack of clarity about the roles and responsibilities of lay volunteers and staff, and the expectations of staff regarding work/life balance, a Task Force discussion and the design of an ideal workplace might be explored. For an executive succession/professional development program to succeed in the workplace environment it needs to challenge the status quo in order to implement new strategies.

III. DEVELOPING THE LOGISTICS OF A NATIONAL FELLOWS PROGRAM:

If executive coaching proves to be the central feature of a proposed Fellows program, then several issues need to be explored:

- How to identify, recruit, orient and support Fellows;
- How to identify, recruit, orient, and support executive coaches; and
- How to maximize rapidly developing technology to enhance a program for professionals.

IV. DESIGNING AN IMPLEMENTATION PLAN:

Based on the recommendations of the National Task Force, develop an implementation plan for Phase III related to launching a national program.

EXECUTIVE SUCCESSION PARTICIPANTS

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**EDUCATION
AND TRAINING IN
NONPROFIT
MANAGEMENT:**
A BRIEF
LITERATURE
REVIEW

Formal and informal in-service training in nonprofit management is an important stream of literature in mapping the knowledge base of nonprofit management. A second category in the literature relates to undergraduate and graduate education programs designed to prepare graduates for careers in nonprofit management. This category includes primarily social work and public administration programs. All these categories can be clustered into the following three streams that are described separately in this literature review:

- **FORMAL AND INFORMAL IN-SERVICE TRAINING IN NONPROFIT MANAGEMENT:** This category includes training and education efforts designed to develop employees of human service organizations while on-the-job.
- **GRADUATE MANAGEMENT (SOCIAL WORK) PROGRAMS:** This category focuses on the education of students enrolled in graduate social work programs, often referred to as macro practice specializations in planning and administration.
- **OTHER MANAGEMENT (PUBLIC ADMINISTRATION & BUSINESS) PROGRAMS:** This category focuses primarily on graduate and undergraduate education programs featuring nonprofit management found in schools/departments of public administration and occasionally in schools of business.

FORMAL AND INFORMAL IN-SERVICE STAFF DEVELOPMENT AND TRAINING

This literature features the growing need for human service organizations to address the importance of providing staff development opportunities and training^{2,3,4}, how to implement such programs^{5,6,7}, and how to effectively infuse training programs into these systems^{8,9}. The literature also focuses on the formal evaluation of these programs in relationship to training programs that did not have a substantial impact on staff practice¹⁰, those that demonstrated positive outcomes^{11,12}, and those that experienced challenges associated with training program implementation^{13,14}.

A major theme in this category is training for the development of managers and administrators, especially newly hired managers who may be ill-prepared for the realities of daily program administration¹⁵. Specific attention is paid to the knowledge and skills that a manager needs to be a successful administrator and leader^{16,17}. The evaluations of management training programs^{18,19} also include a focus on training experiences that promote the transfer of learning^{20,21,22}. Curriculum frameworks include guidelines for management training programs^{23,24,25}, models for developing and training female managers²⁶, and supports for those who administer alternative agencies²⁷. Unmet training needs are often attributed to the lack of training resources^{28,29}.

MANAGEMENT PROGRAMS (SOCIAL WORK)

The literature in this category features formal education of students enrolled in graduate schools of social work. While enrollment issues are addressed in terms of resource decline³⁰ along with the issues of faculty performance³¹ and specific job roles (e.g., case management and income maintenance work)^{32,33}, the vast majority of this literature focuses on planning and administration specializations in graduate schools of social work, including the debate over which type of degree best prepares students for positions in human service administration (social work, business administration, public administration and/or public health)³⁴. There is some acknowledgement that the MSW planning and administration degree is appropriate for entry-level management positions^{35,36} but that the MBA and MPH degrees are better in preparing students for higher level management positions. Considerable attention is also given to the need for interdisciplinary collaboration^{37,38,39,40}.

The literature also reflects the long-standing debate between the separation of clinical and administration curricula in social work education. The learning climate for administration students in social work is also explored, suggesting that a decline in student macro practice enrollment is associated with less than optimal educational climate and curricula for these students^{41,42}. In contrast,

others note the vitality of the macro practice curriculum⁴³ and provide recommendations for how macro practice faculty can engage and recruit students to this specialization⁴⁴. Alternative views are offered and some note that since clinicians and administrators share a similar knowledge and value base, developing a shared skill base through the infusion of both micro and macro content into social work curriculum could strengthen the profession as a whole^{45,46,47,48}.

There is a growing interest in re-examining the curricula in planning and administration specializations in order to improve the status of the management programs^{49,50,51,52,53}. Reflections on environmental changes over the last 30 years lead some to conclude that the macro practice curriculum needs updating. For example, the literature in the early 1980s mirror the changes in the political and social environment and acknowledge that these changes have resulted in alterations in the way that human service agencies are administered, resulting in recommendations for redesigning macro practice curriculum to address these new realities^{54,55,56}.

To address the educational preparation that planning and administration students receive in graduate schools of social work some authors emphasize the employment experiences

of graduates and the utility of what they learned in their graduate programs^{57,58,59}. Others address program design issues⁶⁰, ideas for new content areas^{61,62}, frameworks for curriculum development^{63,64,65,66}, evaluation of textbooks⁶⁷ and teaching methods⁶⁸.

Attention is also given to the different specializations within the macro practice curriculum and their interrelationships^{69,70}. For example, one approach is to combine community practice, policy practice and management practice into a single specialization to prepare students for careers in both management and community practice^{71,72}. Others offer curriculum recommendations for educating students in particular macro practice areas such as social policy⁷³, corporate and industrial settings⁷⁴, mental health⁷⁵, and community practice^{76,77}. Still others advocate for special topics like time management⁷⁸, financial management⁷⁹, managing organizational relationships⁸⁰, and research⁸¹. Finally, attention is also given to planning and administration fieldwork experiences^{82,83} and activities suitable for developing administration and management skills^{84,85,86}, including alternative field instruction models for planning and administration students⁸⁷ such as a skills development laboratory⁸⁸.

UNDERGRADUATE AND GRADUATE NONPROFIT MANAGEMENT

(PUBLIC ADMINISTRATION AND BUSINESS ADMINISTRATION)

The third category of nonprofit management education relates primarily to public administration that includes both undergraduate and graduate programs. The topics in the literature range from the service learning involved in community building⁸⁹ to the many roles that managers play in nonprofit organizations⁹⁰. The development of nonprofit management education programs is discussed from: a historical perspective⁹¹, a diversity of programs perspective⁹², an alumni perspective⁹³, the perspective of practicing nonprofit executives⁹⁴, and the perspectives of multiple stakeholders⁹⁵.

PRELIMINARY CONCLUSIONS

It is clear from this literature review that the training of current nonprofit managers and the preparation of future nonprofit managers for work in human service organizations reflect the different influences of the professions of social work and public administration. While professional education programs have received far more attention than in-service training, it is also clear that the curriculum content in both areas overlaps considerably. The classic areas of human resource management, financial management, and information management permeate both college and in-service programs. It is also clear that the scope of the public administration programs is broader than that of social work programs. Public administration programs prepare graduates for managing cultural arts, educational, environmental, international non-governmental, quasi-governmental, as well as human service organizations. In contrast, the social work programs focus primarily on human service organizations and related advocacy and fundraising organizations. While the nonprofit management knowledge and skills may be different, the nature of the organizational mission, technologies, values, and funding environments are often different.

EXECUTIVE DEVELOPMENT AND SUCCESSION PLANNING

- This literature on nonprofit management education and training poses several dilemmas for the broad field of Jewish communal service: Given the centrality of Jewish communal values in the education of nonprofit managers, how and where are these effectively explored in a learning environment?
- Given the centrality of the lay-professional partnership in Jewish communal service, how and where are the knowledge and skill components of this aspect of practice taught?
- Given the unique fundraising environment supporting Jewish communal organizations, how and where are these knowledge and skill components taught?
- Given the national and international dimensions of Jewish communal organizations, how and where are these knowledge and skill components taught?
- Given the importance of volunteer involvement and management in Jewish communal organizations, how and where are these knowledge and skill components taught?

In essence, does the education of nonprofit managers in Jewish communal service related to the answers to these questions need to be layered on top of core nonprofit management curricula, or does it need to be developed separately? And finally, how much of this content needs to be tailored to the needs of mid-career managers in order to retain their talents in the managing of Jewish communal organizations?

It is interesting to note that very little of the following literature in the *Journal of Jewish Communal Service* addresses the last question related to mid-career professionals, but represents a beginning literature for the design of future lay-professional Web-based surveys:

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UNIVERSITY-BASED JEWISH COMMUNAL SERVICE EDUCATION PROGRAMS

SCHOOL	DEGREES OFFERED
Yeshiva University Wurzweiler School of Social Work	Certificate in Jewish Communal Service (in conjunction with MSW or post-graduate)
University of Michigan	Certificate in Judaic Studies
NYU Wagner School of Public Service and Department of Hebrew and Judaic Studies	Dual Degree program: Master of Public Administration (MPA) from the Wagner Graduate School and Master of Arts (MA) in Hebrew and Judaic Studies
Spertus Institute of Jewish Studies	Master of Arts in Jewish Professional Studies
Hebrew Union School of Jewish Communal Service	Master of Arts in JCS plus dual degree programs with USC including MSW, MPA, MBA, Communications Management/ Also academic certificate in JCS, completed in 2 summers—usually done concurrently with a degree program
Brandeis University	Dual MBA/MA in Jewish Professional Leadership and dual MPP/MA in Jewish Professional Leadership
Baltimore Hebrew University	Master of Arts in JCS/ Certificate in JCS
Gratz College	Master of Arts in JCS with emphasis on nonprofit management/ Certificate in JCS and nonprofit management/ Dual degree: MA in JCS and MSW from U of Pennsylvania
American Jewish University	Master in JCS
Jewish Theological Seminary (Dual degrees with Columbia University)	Dual degrees: Master in Jewish Studies and Public Administration (at Columbia)/ Master in Jewish Studies and MSW (at Columbia)

A JEWISH FUNDERS NETWORK MONOGRAPH 2009

AVERAGE # RECENT STUDENTS

12 during school year;
6 during summer

First applicant enrollment session will be January 2009

16

18

10-13 Masters

15 for MBA/MA

10 MA/6 certificate
6 certificate

7 MA/6 certificate

3

AVERAGE # RECENT ACCEPTED APPLICANTS

All accepted

8

18

12-13 Masters

10 MBA/MA-10 MPP/MA

6 MA (1 deferred,
3 declined in 2008)

7 MA (1 is completing dual
degree (MSW) with U Penn/
6 certificate

3

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