

# ADVANCING THE CAREERS OF MID-CAREER JEWISH TALENT IN THE BAY AREA

August 2016

Research conducted by Adam Pollack

This report studies career development among mid-career Jewish professionals serving the San Francisco Bay Area. It also identifies barriers inhibiting their advancement and provides recommendations on how to lower those barriers.

# Executive Summary

With significant resources dedicated to developing early-career and executive leaders, this research focuses on the barriers inhibiting career advancement among mid-career Jewish professionals, specifically in the San Francisco Bay Area. This project was conducted independently, without funding. The researcher used multiple data-gathering techniques: interviewing organizational senior leadership and hiring managers, surveying mid-career Jewish professionals working in the Bay Area, interviews with program directors leading national or local mid-career development programs, and a literature review of talent development and engagement. The following insights were discovered:

**Insight #1: Bay Area mid-career Jewish talent is well-educated.**

83% of surveyed mid-career Jewish professionals in the Bay Area hold advanced degrees within 16 different disciplines. Despite this deep knowledge, this cohort often lacks the “hard skills” necessary for senior and executive leadership roles.

**Insight #2: There is a skills gap between what hiring managers need for senior-level positions and Bay Area mid-career talent’s experience.**

**Insight #3: There is a lack of opportunity for internal advancement.**

The Bay Area’s Jewish institutional landscape includes both local organizations and regional offices. Some larger agencies have traditional job descriptions with distinct roles, where openings become available when someone else leaves. Similarly, regional offices are either fundraising-focused with distinct professional roles or program-focused with restricted funding, limiting career growth and development. In startups, however, talent is hired into roles, and then as the organization develops, new roles are necessary, catalyzing opportunities for promotion and professional growth.

**Insight #4: Organizational leadership and professionals are dissatisfied with existing professional development opportunities and are not encouraged to seek high-level development experiences.**

While leadership and mid-career professionals agree that professional development is important, the current offerings are not valuable enough experiences to warrant “time away from the desk.” In addition, limited resources are dedicated to professional development, limiting access to higher-caliber opportunities.

**Insight #5: Talent development initiatives seek to build organizational and movement capacity, not local community capacity.**

Few fellowships exist to develop local leadership capacity. Most fellowships and talent development programs invest heavily in the talent dedicated to working within their movement (i.e. BBYO and Hillel).

**Insight #6: Training mid-career Jewish professionals in “hard” management skills has been largely overlooked both locally and nationally.**

The following recommendations stem from these insights:

**Recommendation #1: Create a Bay Area mid-career Jewish talent fellowship pilot.**

With hiring managers and mid-career professionals identifying a skills gap, there is opportunity to develop the hard management skills of the latter so that they can move into senior and executive roles over the next 5 years. To accomplish this, a select group would engage in a one-year experience featuring top-notch professors and practitioners—plus a Jewish bridge for relevant context—to gain those skills, work one-on-one with a coach to individualize learning, and apply learning at their current workplace.

**Recommendation #2: Conduct further research.**

Additional research is recommended to better understand if the barriers spotlighted in this report are mirrored in other communities. Furthermore, it is critical to examine whether certain communal factors (e.g. community size, organizational diversity, etc.) influence these trends. Finally, funders, executive and lay leadership would benefit from quantifying ROI from developing internal talent and community capacity, providing them with greater evidence for additional funding of such initiatives.

**Recommendation #3: Expand national conversation about investing in talent to include the middle of the “leadership pipeline.”**

As the conversation about talent development and “pipelines” becomes more common, it must include how to invest in those who are already 10-15 years in the field. Middle managers are often stretched between managing staff and projects, as well as designing strategy. Without an investment in this demographic, we risk losing strong talent and leadership that we’ve already committed significant resources to developing during the first 10 years of their careers.

**Recommendation #4: Prototype Bay Area Jewish Talent Network.**

This network would be designed to make it easier for talent to move among agencies. Potentially modeled after the Talent Alliance, a local network would ensure steady benefits across agencies, and more transparent career paths. In addition, developing a network would make it easier for recruiters to identify potential candidates for job openings, decreasing the resources spent on hiring.

# Advancing the Careers of Mid-Career Jewish Talent in the Bay Area

*RESEARCH CONDUCTED BY ADAM POLLACK*

## Context

Organizational success is a function of many factors and one critical one—that is often overlooked—is the selection, development and retention of talent. While much can be said about selection, this report focuses on talent development and retention.

According to Leading Edge’s 2014 study<sup>1</sup> about talent development, “[m]ost organizations don’t make leadership development a priority: investing in talent is often seen as ‘overhead’—something to be minimized.” The study continues that, “while some Jewish organizations do report offering professional development training programs to their employees, job-integrated learning opportunities, development-focused supervision, and mentorship are rare.” However, the report clearly concludes that Jewish organizations are not “sufficiently developing and advancing the leaders it already has.”

This challenge is not unique to the Jewish community; still, more is being invested on this front within the private sector. In “The ROI of Talent Development<sup>2</sup>,” a 2014 white paper written by the UNC’s Kenan-Flagler Business School, it states that there has been a significant increase in spending on talent training since 2010. It continues by explaining: “Organizations that invest in the training and development of their employees at all levels benefit by having stronger talent pools, increased retention, lower turnover, higher employee satisfaction rates, and ultimately, healthier and stronger organizations.” There are additional “hidden costs,” too, including losing knowledge and an unwanted shift in culture, particularly among smaller organizations. Furthermore, in Matthew Bidwell’s 2012 paper, “Paying More to Get Less: The Effects of External Hiring Versus Internal Mobility<sup>3</sup>,” he found that external hires are 61% more likely to be fired from new jobs than those hired from within. He also found that external

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<sup>1</sup> Ditkoff and Landles-Cobb, Leadership Pipelines Initiative: Cultivating the Next Generation of Leaders for Jewish Nonprofits, 2014.

<sup>2</sup> Perez, Sarah, “The ROI of Talent Development,” UNC Kenan-Flagler Business School, 2014.

<sup>3</sup> Bidwell, Matthew, “Paying More to Get Less: The Effects of External Hiring Versus Internal Mobility,” University of Pennsylvania, 2012.

hires' compensation packages were 18% higher than those promoted internally. These statistics bring a real dollar value and cost to not developing our most promising people.

In the not-for-profit field, our primary metric is not related to profitability. We must develop ways to quantify the ROI of investing in our community's talent. In other words, do developing and retaining talent deepen impact and better our ability to achieve our mission? Research demonstrates that answer to be "yes." This surfaced a deeper issue: with a large generation of leadership readying for retirement, is our community's talent ready to transition into executive and senior leadership positions? In David Edell's 2013 article, "Analysis-Paralysis: Another Call for Action on Professional Leadership<sup>4</sup>," he estimated that American Jewish communal organizations experienced 50 executive turnovers annually, yet there isn't sufficient new leadership to take its place. Therefore, another question must be asked: how might we prepare current mid-career Jewish professionals to take on and succeed in their first senior and executive-level roles?

In late fall 2015, an initial analysis was conducted to identify that there was significant national investment in developing the leadership skills of early-career and executive-level professionals (i.e. BBYO's Professional Development Institute (PDI) and the Schusterman Fellowship, respectively), but few formal programs existed to develop mid-career talent, such as the Wexner Field Fellowship and JTS' Day School Leadership Training Institute. Even fewer initiatives focus on creating local leadership capacity (i.e. UJA's Ruskey Fellows and the UJA Federation of Northern New Jersey's Berry Fellows). This is not a solely a Jewish sector issue, but rather a larger social sector challenge. McKinsey & Co. surveyed 200 nonprofit CEOs and top managers to learn that there is a "chronic underinvestment in leadership development within the US social sector, accompanied by 25 percent growth in the number of nonprofit organizations in the past decade, [which] has opened a gap between demands on leaders and their ability to meet those needs<sup>5</sup>."

More data and information were needed to test these findings as they pertain to the Bay Area. In response, independent research was conducted on the barriers inhibiting career advancement among mid-career Jewish professionals working at Jewish organizations in the Bay Area in order to:

- 1) test the validity of the assumption that there is an issue with developing the Bay Area's mid-career Jewish professional talent; and,
- 2) if so, to propose solutions to address it.

Again, the essential research question was: **how might we prepare Bay Area mid-career Jewish professionals to take on and succeed in their first senior and executive-level roles?**

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<sup>4</sup> Edell, David, "Analysis-Paralysis: Another Call for Action on Professional Development," eJewishphilanthropy.com, June 2013.

<sup>5</sup> Callanan, Laura, Gardner, Nora, Mendonca, Lenny, and Scott, Doug, "What social-sector leaders need to succeed," McKinsey & Company. November 2014. [http://www.mckinsey.com/insights/social\\_sector\\_leaders\\_need\\_to\\_succeed](http://www.mckinsey.com/insights/social_sector_leaders_need_to_succeed)

## Methodology

Data was gathered through multiple stakeholder groups, including hiring managers and organizational executives, Bay Area mid-career Jewish talent, analogous talent development initiatives across North America and relevant research reports.

Employer interviews were conducted with 12 Bay Area Jewish not-for-profits, representing the diversity of the Bay (i.e. startups, “legacy” organizations, national headquarters, and local branch offices). These interviews focused on identifying the knowledge, skills and abilities sought by hiring managers when filling senior and executive-level roles, and the challenges they face in finding internal and local candidates to fill those jobs.

Bay Area mid-career Jewish talent participated in a survey that was distributed through both national and local networks over a two-month period. A total of **40** individuals participated in the survey, of which **24** qualified to complete it<sup>6</sup>, based on the following selection criteria:

- Work and live in the Bay Area
- Consider him or herself a career Jewish professional
- Have 7+ years in the Jewish communal field
- Currently hold a middle management job

Aside from this sample, additional research was conducted by analyzing online publications on talent development and retention (primarily in the private sector—see Appendix A), websites describing talent initiatives and interviews with program directors from select initiatives.

The report that follows is an analysis of this data and recommended next steps.

## Insights

The following are the key insights gleaned from this research:

1. **Bay Area mid-career Jewish talent is well-educated.** With 67% holding masters degrees and another 16% holding other advanced degrees (i.e. PhD and/or rabbinic ordination), the Bay Area’s mid-career Jewish professionals are a learned group. The sample received 16 different kinds of graduate degrees, ranging from Jewish education and law to rabbinics and theater. There is an abundance of diversity in interest and expertise. While the sample was a self-selected group and may skew this data upward, a scan of Bay Area mid-career Jewish professionals shows that this group is accomplished academically. Therefore, we could extrapolate that the percentage of Bay Area mid-career Jewish professionals with advanced degrees would still be high, even though the actual percentage is unknown.

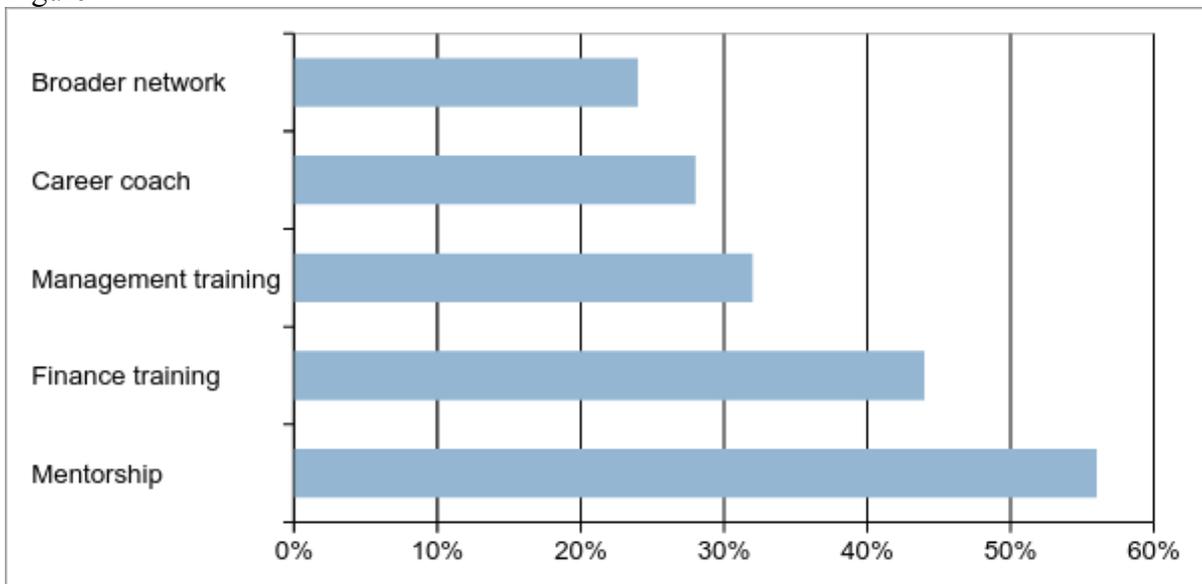
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<sup>6</sup> It is estimated that 75 mid-career Jewish professionals work in the Bay Area. This estimate does not include professionals who currently work in the Jewish community, but do not foresee a lifetime commitment to this work. Three such individuals emailed with input, since they did not qualify to complete the survey, but this data was not incorporated into this study.

2. **There is a skills gap between what hiring managers need for senior-level positions and Bay Area mid-career talent's experience.** Employers regularly found that mid-career Jewish professionals in the Bay Area lacked adequate supervision and management experience when compared to those applying from other sectors. This has led employers to hire from outside the Bay Area, from the private sector, or, on rare occasions, from within and to provide-scaffolding to support that individual's growth once in the new role.

Survey data demonstrated that while Bay Area mid-career Jewish talent has supervision experience (58% supervise at least one individual in either their current or previous jobs), they lack general management training and experience. Among those who do supervise staff, often it is only one or two people, not large teams. This is partially due to the relatively smaller size of most Bay Area Jewish organizations, as compared to larger cities. In addition, Bay Area mid-career Jewish talent expressed that while they oversee projects, they are often not gaining valuable cross-departmental and financial management experience. When asked if they anticipate gaining such experience in their current role, the majority did not foresee this happening. When surveying organizational staff structures of Bay Area Jewish not-for-profits, their relatively small size supports Bay Area mid-career Jewish professionals' assessment that they lack opportunities to gain such experience within their current organizations. However, when asked what they need in order to advance their careers, 62% felt they needed more time in their current job. They also indicated a need for new hard skills, likely gained through training and coaching, to advance their careers (Figure 1).

Figure 1



Survey respondents indicate what they need to be prepared for their first senior-level role. This chart points to consensus between what hiring managers and executives need in senior managers and what Bay Area talent seek to develop.

3. **There is a lack of opportunity for internal advancement.** While there are exceptions to this insight, many organizations either don't have large senior staff teams or seek a senior staff member with the skills explained above. With that said, there may be opportunities for growth within an organization, through shadowing and learning new hard skills from colleagues, which would prepare Bay Area mid-career Jewish professionals to take on senior roles as openings emerge.

Although one may perceive greater advancement opportunities among larger organizations, this was not apparent. For example, larger organizations have distinct job roles, where job openings need to become available for advancement to occur. However, among startups with more dynamic and faster development, new positions are created regularly. Once talent is hired into those environments, there is some opportunity for advancement, but it is neither consistent nor reliable.

An initiative worth noting here is the Talent Alliance, supported by the Schusterman Foundation, which aims to “create a long-term career path across three partner organizations<sup>7</sup>,” Moishe House, BBYO, and Hillel International. This effort incentivizes Jewish professionals to seek advancement both within their current organization and among other Alliance members. For example, the Alliance offers its talent clear career paths and calculates benefits based on years worked at any Talent Alliance organization. This initiative recognizes that not all organizations will provide talent with advancement opportunities, and that others can and should, and that their continued commitment to serving the Jewish sector is incentivized.

4. **Organizational leadership and professionals are dissatisfied with existing professional development opportunities and are not encouraged to seek high-level development experiences.** Developing internal talent is connected to better job performance and staff retention rates, as explained in the “Context” section of this report. Organizational leadership understands this; nevertheless, they are unable or unwilling to adequately fund such experiences. More importantly, however, the senior staff interviewed reflected that our local community's programs “didn't always meet [their] quality standards and had less impact as a result.” National Jewish learning opportunities, on the other hand, provide a spectrum of experiences. For example, some offer high-quality trainings, while others do not; some are narrow in focus (i.e. early childhood education) and others are generic; and some are long-term whereas others are one-day gatherings. Please note that these types of experiences are not mutually exclusive. For instance, a given training could be a one-day, high-quality experience, while another might last several days with little impact. In addition, few employers mentioned being proactive in encouraging their staff to attend secular professional development opportunities. The reason for this remains unclear.

Monisha Kapila, CEO and founder of ProInspire, an organization dedicated to developing talent across the social sector, wrote that “professional development opportunities and investments in

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<sup>7</sup> <http://talent-alliance.org>

developing people are not created equal<sup>8</sup>.” She continues, citing a ProInspire survey, that: “despite demand for professional development programs, such offerings are scarce and access is limited in the [social] sector. Nine out of ten nonprofit managers indicated interest in leadership or managerial training, and believe that it will make them more effective in their roles, yet only half of them have received such training since assuming a role managing direct reports. What’s more, only 39 percent of respondents said their organizations pay for leadership or managerial training. Compare this to the deeper resources invested in developing people in the private and government sectors, and the need for more robust professional development initiatives aimed at growing nonprofit leaders becomes clear.”

In the Bay Area, interviewed employers echoed ProInspire’s findings in that they dedicate limited resources to professional development, inhibiting accessibility to high-quality growth opportunities and often overlooking secular offerings. While a case can be made to fundraise to support attendance at such experiences, which can cost up to \$10,000 for one week, the return-on-investment cannot be clearly articulated by many Jewish organizations. “Getting away from one’s desk” is always a challenge, especially for mid-career professionals whose responsibilities are often varied and essential. Also, smaller Jewish organizations and startups lack the bandwidth to send staff for training (i.e. staff have multiple responsibilities and they would have to hire a temp or a volunteer to complete work while their professional is away). With that said, if a professional development experience were of high quality, reasonably priced, and closely aligned with work tasks, it might be prioritized.

5. **Talent development initiatives seek to build organizational and movement capacity, not local community capacity.** JCCA, BBYO and Hillel are among the leading movements offering intensive professional development for their talent. Making a significant investment in one’s own talent makes sense, as retaining and developing talent saves money and time. With that said, few opportunities exist for cross-organizational or horizontal learning. These movement-based initiatives logically build movement—not local—capacity. With that said, there are national organizations offering horizontal professional development, as well as local community capacity-building experiences, such as the [Advancing Jewish Professionals](#). I will address these in more detail below under “Insight #6.”
6. **Training mid-career Jewish professionals in “hard” management skills has been largely overlooked both nationally and locally.** With a marked lack of supervisory and management experience among Bay Area mid-career Jewish talent, as noted in the second insight, there is opportunity for development in this area. Mentioned above, several national efforts, such as the Schusterman and Wexner Field Fellowships offer cross-organizational, national/international training, but focus on leadership development and the individual, and not hard management skills and local capacity development. While leadership is an important development area for many, it was not identified as a “blind spot” for Bay Area mid-career professionals. Rather, Bay Area mid-career Jewish talent and hiring managers noted a lack of management skills. Moreover,

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<sup>8</sup> Kapila, Monisha, “[The Case for Professional Development in the Nonprofit Sector](#),” The Huffington Post, December 4, 2013.

with significant resources supporting early-career and executive-level professionals (e.g. Hillel's Springboard Fellowship and Leading Edge's CEO Onboarding Program, respectively), the UJA-Federation of NY's Ruskay Fellows and Hillel's Accelerate program are among a few initiatives on the local front supporting those in the middle of their careers. Again, these fellows receive leadership training, not explicit management skills (or hard skills), such as financial management, operations, and staff supervision, among others.

Some Bay Area mid-career Jewish professionals feel discouraged about their career prospects, and still seek ways to gain new skills to remain competitive for senior and executive roles. With executive and senior roles often being filled by those with careers in the private sector, there is concern that those dedicating their careers to serving the Jewish community will not advance. They know that they need more hard skills, yet lack a way of gaining them. There is an understanding among some Bay Area mid-career Jewish talent that the Bay Area's Jewish organizations will not offer the variety of experiences necessary for advancement, and that they may need to search for opportunities in other communities or in the private sector to gain those skills. This was summed up when a mid-career professional said, "I would likely need to move away from the Bay Area to move my career forward. There just aren't enough opportunities to supervise teams of people and do both the strategic thinking and programming."

## **Recommendations**

1. **Create a Bay Area Mid-Career Jewish Talent Fellowship Pilot:** The Bay Area Mid-Career Jewish Talent Fellowship pilot program would:
  - Provide mid-career talent with the supervision and management skills necessary to grow in their current roles and eventually to enter into larger leadership positions;
  - Build the Bay Area's capacity by developing and retaining the next generation of senior staff and executives; and
  - Create a mid-career talent network.

By building the leadership and hard skills of mid-career professionals, the Fellowship would solve the "skills gap" expressed as a barrier to hiring Jewish talent into senior roles by both hiring managers and executives. In addition, it would bolster local capacity both by investing in the leadership pipeline and in creating the next generation's talent network.

The pilot would launch through a twelve-month rapid prototyping phase. Since both employers and Bay Area mid-career Jewish talent identified a need for gaining management skills, it would offer skills intensives featuring world-class management professors from local universities and practitioners. In addition, the Fellowship would include coaching a capstone project. Critical to the project's success would be real-time integration of learning into the talent's workplace. Also essential would be commitment from the employer to provide "stretch assignments," those tasks that would challenge the professional to apply learning in their current environment.

A longitudinal evaluation would take place throughout the pilot to test assumptions, to provide formative feedback in order to quickly improve the pilot, and to measure how one is achieving

desired outcomes and employee/employer satisfaction with the initiative, as well as its effects on longer-term talent retention and recruitment. If successful, this pilot could be adapted to other cities.

2. **Conduct further research:** More research is needed on the barriers inhibiting career advancement among this demographic, either in other US cities or on a national scale. This would inform us on similarities and differences in barriers inhibiting career advancement for the target demographic. It would also help us determine if trends exist across community types, such as whether community size, culture and/or geography, as examples, influence the existence of career advancement barriers. Most critical, it would help inform the Jewish community's approach to developing mid-career talent so that it may fill vacant executive and senior positions across the country.

Separately, it is essential to understand the ROI related to building the community's talent capacity. Rather than investing in talent development across the country (or the world), like many other efforts where fellows represent disparate communities, the pilot described above would invest in the talent located in one place. Therefore, its purpose is to build the Bay Area's capacity in leading its Jewish institutions as we move forward. Such knowledge of the local ROI is valuable data.

A separate research topic worth pursuing is the ROI of investing in internal talent to take on more senior positions. While it is common knowledge that it is beneficial to promote from within (i.e. less time onboarding, builds morale, saves money, etc.)<sup>9</sup>, it is still not regularly practiced in the not-for-profit sector. Research on the "why" of this phenomenon would be beneficial. In addition, researching the effects of more seamless movement of talent between organizations (as described in "Recommendation #4") is also worth supporting.

3. **Expand National Conversation about Investing in the Middle of the "Leadership Pipeline:"** With significant resources going to develop early career professionals (i.e. Hillel's Springboard Fellowship) and executives (i.e. the CEO Onboarding Program), there is still a lack of adequate support for mid-career professionals, in particular in the area of management training. For the proverbial leadership pipeline to be complete, in essence, we need to have a middle that then leads to those senior and executive roles. Our community invests too much money in these other areas not to invest in those already committed to careers serving the Jewish people. While some opportunities exist to serve this demographic, it does not focus on hard management skills development. I encourage broadening the conversations to include how to support the growth of mid-career, as well as succession planning. Leading Edge and JPRO, among others, are interested in exploring various models to achieve this goal.

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<sup>9</sup> The researcher recognizes that there are benefits to bringing new talent into the sector, as well, such as new ideas, energy and diversity of experience.

4. **Prototype Bay Area Jewish Talent Network:** Modeled after the Schusterman Foundation-funded Talent Alliance, this network of organizations would make it easier for the Bay Area's Jewish professionals, regardless of career stage, to move between Jewish organizations when they are ready for new experiences. The Network would both bring transparency to career paths among Bay Area Network-member agencies and allow talent to maintain benefits levels when moving to a new organization. This could incentivize Jewish professionals not only to remain in the Bay Area, but also to serve the Jewish community. Moreover, a Talent Network may lower costs related to recruitment efforts.

## **Conclusion**

This report serves as a starting point for removing the barriers inhibiting career advancement among the Bay Area's mid-career Jewish professionals. While the report makes specific recommendations, ~~those~~ they cannot be realized without communal buy-in. Our acceptance of a significant leadership transition over the next decade will move these efforts forward. Without addressing the issues now, we risk facing a talent gap. It is our responsibility to those we serve to invest significantly in the talent we have, lowering turnover costs and making our organizations more efficient and impactful. I invite you to contact me to discuss how you can become involved in our next steps and to add to the conversation spurred by this research.

## **Recognition**

The following advisory team guided this research and report. I thank them for steering the research and data analysis.

**Morlie Levin** is a tested executive with incisive analytical capabilities and the ability to develop the strategy and cultural underpinnings needed to achieve mission-driven goals. Previously, she served as the CEO at NEXT: A Division of Birthright Israel Foundation, as well as was the National Executive Director at Hadassah and a consultant at RAND Corporation.

**Toby Rubin**, an organizational leadership consultant, was Founder and led Upstart Bay Area as CEO for 10 years. She has been involved in numerous lay and professional roles in the Jewish community. Toby is a strategic thinker who helps organizations design innovative ways to serve constituents and sustain their efforts.

**Anonymous**, a talent development and organizational culture expert

**Anonymous**, an evaluation and organizational learning expert

**Elisheva Gould**, a NY-area Jewish educator and entrepreneur, who was enlisted to proofread and edit this report. Her freelance editing, creative curriculum design, and other writing work, as well as her multilingual tutoring services are listed here: <http://elishevagould.wixsite.com/tri-tutoring-editing>

## Appendix A: Additional Reading

Cornelius, Marla et al. “Ready to Lead? Next Generation Leaders Speak Out,” CompassPoint Nonprofit Services, The Annie E. Casey Foundation, The Meyer Foundation, and idealist.org, 2008. [https://www.compasspoint.org/sites/default/files/documents/521\\_readytolead2008.pdf](https://www.compasspoint.org/sites/default/files/documents/521_readytolead2008.pdf)

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