CEO SUCCESSION

Case Studies of Excellence from the Jewish Nonprofit Sector
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Leading Edge was founded in 2014, on the precipice of a long-predicted generational leadership transition. Five years later, that very transition is happening. Major Jewish organizations recently completed CEO searches, while others are about to embark on theirs. This is a pivotal moment in Jewish organizational life because many of the CEOs chosen today will set the direction for their organizations and for the sector as a whole for years to come.

In the fall of 2018, Leading Edge released a CEO Search Committee Guide, which laid out best practices for CEO searches and applied them to the Jewish nonprofit sector. This series of case studies builds on that work by highlighting six fascinating and unique stories of leadership transitions, all of which offer bright spots and lessons to the sector as a whole.

A leadership transition often gives rise to both a sense of loss and an opportunity to clarify a vision or reinvigorate an organization. These case studies pull back the curtain on the multi-dimensional and very human process of leadership transition.

Three of the stories highlight internal candidates who were selected as the new CEO, and three highlight stories of external candidates who were selected. In each example, the board and the search committee approached the process with a deep level of intentionality, thoughtfulness, and purpose.

The case studies were expertly prepared by Eben Harrell, a senior editor at Harvard Business Review (HBR). Mr. Harrell performed extensive interviews with a range of stakeholders, and we are grateful to everyone who candidly shared their stories so that we may all benefit from their successes and lessons learned. Leadership transitions are a time of great opportunity and great risk for organizations, and hiring a new CEO is just the beginning. We hope that these six compelling stories will help us all reflect on how we can best prepare and position our leaders to succeed. Our future truly depends on it.

Happy reading,

Gali Cooks
President and CEO

Sandy Cardin
Board Chair

Fall 2019
CASE STUDY 01

AMERICAN JEWISH WORLD SERVICE
Ruth Messinger took over the reins as CEO of American Jewish World Service (AJWS), a Jewish nonprofit focused on international development, human rights, and global justice, in 1998, shortly after losing a race to become New York City’s mayor to incumbent Rudy Giuliani. By June 2013, she was at the power center of her career, having grown AJWS into an internationally recognized, $40-million-a-year grant-giving organization that employed over 140 people.

Her accomplishments at AJWS were numerous. In the immediate aftermath of the Indian Ocean tsunami of 2004, which would eventually claim over 200,000 lives, Messinger had the foresight to see that the event would push international development into the forefront of Jewish consciousness. In the preceding years, she prepared AJWS to respond to international crises, so AJWS’ swift response brought thousands of new donors into the fold. She stewarded the organization through the 2008 financial crisis, managing to increase the reach and impact of AJWS’ national and international work. A gifted public speaker, she worked tirelessly to grow financial and political support for the organization’s mission.

“She really doesn’t sleep,” says longtime AJWS board member Marty Friedman. “She can work over 100 hours a week and still be the sharpest person in the room.” Even though Messinger wasn’t the founder of AJWS, Friedman recalls, she had become so deeply intertwined with the organization’s identity that staff, board members, and other stakeholders had difficulty imagining AJWS without her at the helm.

By 2013, AJWS had matured from a fast-growing upstart to a more stable, established incumbent. “We were 28 years old,” Friedman says. “Under Messinger we had grown up. We weren’t the new kid on the block anymore.” This period of growth marked an accomplishment for Messinger that eludes most
chief executives. Not only was AJWS financially healthy, but she had also built an exceptional partnership with her strong and experienced number two, Robert Bank, whom she had brought into the organization as executive vice president in 2009 to build out a strategic plan that more deeply focused on the organization’s internal operations and programmatic impact. The board was engaged, participating in the strategic plan and completing internal work to sharpen its governance practices. Messinger herself had recently received several recognitions and awards, including being named one of the 50 most influential Jews in America by the Forward.

So when the board formed a task force in spring 2013 to discuss what Harvard Business Review has called “the last act of the great CEO,” everything was in place for Messinger to transition her power from a position of strength. There was just one problem: Messinger had no intention of ever stepping down.

“I used to tell donors who inquired about my plans that the only way I was going to leave my office was feet first,” Messinger recalls. “It’s a punchline, but I wasn’t joking.”

Experience and tenure are important assets for chief executives, but there’s always the danger that great CEOs will overstay their welcome. Researchers have found that—among CEOs of large public companies—advanced age appears to be negatively related to firm value and operating performance. For that reason, a majority of firms in the S&P 1500 have policies in place that mandate the retirement of their CEOs at age 65, including corporate powerhouses such as General Electric, Altria, ExxonMobil, and Intel. But executives who have remained successful late into life—such as Les Wexner, the 81-year-old CEO of L. Brands, and Warren Buffett, the 88-year-old CEO of Berkshire Hathaway—prove that age isn’t always a barrier to value creation.

In 2013, Messinger was 73 years old, but—still vital—she was closed off to the possibility of leaving her job. What followed was a three-year transition period that holds lessons for organizations facing the prospect of replacing a charismatic, forceful, long-serving chief executive.

In this particular instance, time would prove to be a common theme of how AJWS eventually pulled off a successful transition. Messinger needed time to come to terms with her departure; AJWS’ board needed time to develop the profile of the successor they were looking for; and Robert Bank—the board’s eventual choice—needed time to garner support from both Messinger and the board to transition into the CEO role. Success was by no means guaranteed. Along the way, each stakeholder took deliberate, courageous steps to help move the process along. By October 2015, when the transition was announced in an exclusive article in the Forward, all
of the pieces were in place for Bank to build on Messinger’s legacy with his own unique vision.

**The CEO’s Journey**

How Messinger came to embrace an orderly transition at AJWS depends on whom you ask. Board members recount how her transition was first raised as an issue during their strategic plan in 2011. Spurred by questions from several key donors and partners about when Messinger would step down, board members say they first told Messinger that AJWS needed to begin plans for her succession in the autumn of 2014.

Messinger has a different memory. She recounts a “lightbulb” moment during a phone call with a recruiter inquiring about her interest in another chief executive position. Messinger’s executive vice president, Bank, worked down the hall from her. “I put the phone down and I walked over to his office and I asked him, ‘How often do you get these calls for CEO positions?’” she recalls. Bank told her that he had been fielding such offers but hadn’t told her for fear of upsetting her as she had reacted negatively in the past when strong employees had left AJWS. At that moment, Messinger says, she realized that she risked losing Bank if she didn’t step aside for his ascension to CEO. “He was ready to head something,” Messinger recalls. “I realized this almost too late.”

Messinger had come to rely heavily on Bank since hiring him in 2009 to run internal operations and lead strategy management at the organization—an event she remembers with characteristic self-deprecation and wit. “Around 2008, I reluctantly came to the realization that my brilliant management system wasn’t working. We had grown very quickly, and by 2008, we had three vice presidents who had stopped disclosing the whole truth; instead, they focused only on their department’s successes. I realized I needed someone to oversee operations and challenge the division heads on their Panglossian reports.”

**I put the phone down and I walked over to [Robert’s] office and I asked him, ‘How often do you get these calls for CEO positions?’**

RUTH MESSINGER
At first, the realization that Bank might leave to head up a different organization upset Messinger. But soon she saw a path that could secure her legacy—she would transition power to Bank. “I said to Robert, ‘I think we should talk to the board and say that we’re going to announce on a certain date that you’re going to become the CEO. I will continue to do part-time work for you. And the organization can thrive best with this scenario. The board will love it.’”

Although Messinger had a plan in place, there was still a major obstacle to overcome. Her clear vision for a smooth transition was not one shared by the board—at least not at first.
The Board’s Journey

Succession planning is never a clear-cut task. CEOs have a responsibility to identify and groom potential successors. But hiring a CEO is a board’s responsibility—a board’s primary and most important duty is to appoint and manage its chief executive. This can lead to confusion: A CEO feels responsible for identifying a successor but then doesn’t have the authority to actually assure her or his succession.

By late 2014, AJWS’ board had done deep work on board governance, which had gotten it to a place of deserved confidence in its decision-making. It learned how to be a highly effective board. It hadn’t always been that way. Until the mid-1990s, the board had been composed mostly of friends and family of one of the organization’s founders, Larry Phillips. During Messinger’s tenure, the board was composed of a broader group of engaged supporters, the majority of whom had been recruited by Messinger. Board members rarely asserted their own will or decision-making, which, while not unusual for a high-growth organization, is not best practice. But in the early 2010s, as part of its strategic plan, the board had set new protocols and rules. “There was a feeling that we had matured as a group,” Kathleen Levin, who was board chair at the time, recalls. “We were confident in our role, and we trusted each other.”

In fall of 2014, the board appointed a “top leadership design task force,” comprised of four members, to focus on Messinger’s transition. Because the full board only assembled three times a year, it found assigning small, focused task forces to specific issues to be an effective practice. The leadership design task force also benefited from being a well-balanced group. Marty Friedman, an investment banker, had institutional knowledge, having served as board chair in the earlier years of the organization and on the committee that hired Messinger. Marcella Kanfer Rolnick was an experienced executive with a Stanford MBA who was well-versed in governance protocol as well as how to get the most out of teams. Kathleen Levin, the board chair, was diligent and detail-oriented, and helped keep the team’s proceedings on track. And Barbara Dobkin was an experienced board member who had chaired AJWS’ board during its strategic planning process and board reorganization. She also had a close relationship with Messinger as a former board chair, AJWS donor, and friend.

The task force would come to rely heavily on one another as it pushed the process forward. “Everyone was totally engaged,” Levin says. “I would send out an email to the group and would receive replies within hours. That level of engagement is unusual for a group of volunteers, but it proved essential as the transition unfolded.”

At its formation, the task force was intent on pursuing a “creative” approach to Messinger’s succession. “We did not want to just automatically commence a normative ‘retire the old, in with the
new’ model of succession planning,” Kanfer Rolnick recalls. And when Messinger came to them with her plan to appoint Bank, the group resisted rubber-stamping Bank as the successor. The purpose of the task force was to determine how best to retain Messinger as an asset to the organization and honor her passion and desire to keep contributing while making room for future leadership. The group suggested hiring a consultant to advise them on next steps. “We wanted to be thoughtful and learn from best and creative practices out in the world, not just take the obvious path,” Kanfer Rolnick explains.

The task force’s resistance frustrated Messinger, who wondered if it wasn’t a needless expression of the board’s newfound confidence. “Searches are exciting moments for boards,” Messinger says, suggesting the board’s thinking was, “Why does she get to tell us who to hire? Now we get to play like boards do!”

But the task force members had legitimate reasons for their hesitation. In an era of increased scrutiny from donors and the public on the professionalization of nonprofits, they worried about the optics of a rushed appointment. Without ruling out Bank as a successor, they wanted to take their time to consider alternative approaches to executing the search. Kanfer Rolnick shared with task force members her view that those who rush these processes often must spend more time fixing problems later than they would have spent on careful, upfront planning. “My view is always, ‘you have to move slow to move fast,’” Kanfer Rolnick says.

So, Kanfer Rolnick drafted an RFP for search consultants. After a false start with the first firm it engaged (among other things, one of the principals unexpectedly had to step away for personal reasons, which meant an all-male team would lead the engagement; the task force balked at the loss of expertise left by the principal’s leave and the gender imbalance it created), the task force hired a newly formed consulting firm comprised of past CEOs of major nonprofit organizations. Along with believing the consultants were the best advisers available for the job, the task force felt hiring contemporaries of Messinger with similar profiles and stature would reassure Messinger that age bias was not going to factor into its recommendations. The task force asked for a research round-up of best practices for nonprofit CEO successions.

In early March 2015, in advance of a full board meeting, the consultancy presented its recommendation to Messinger and Bank at a late-night dinner. While the research round-up revealed that insider CEOs tend to outperform external appointments, and externally appointed CEOs have a high failure rate, the consulting firm still suggested launching a national search and that Messinger step away entirely from the organization. Bank, it said,
A 2013 survey of nonprofit CEOs found that one reason chief executives step down is because they recognize how hard it is for younger professionals to reach their full potential while a long-term executive is in place.

“Creating opportunities for a new generation can be a powerful motive to move on,” the researchers write.

Source: [http://www.buildingmovement.org/pdf/Leadership_in_Leaving_FINAL.pdf](http://www.buildingmovement.org/pdf/Leadership_in_Leaving_FINAL.pdf)

The task force was taken aback by the absence of creative solutions offered by the consultants. And Messinger was blindsided. She had assumed the consultants would endorse her plan to promote Bank. She worried that Bank would not stick around long enough for a national search to be completed given offers for other chief executive positions that she suspected were coming his way. And even if he did, she worried that requiring a talented insider such as Bank to enter into a leadership contest would demoralize the staff and lead to defections. “I don’t get it,” Messinger responded. “This is a thriving organization, which thrives both because I’m the CEO and Robert’s a great executive vice president. You all don’t know for sure that he can be a CEO. But you’re supposed to trust my judgment and I know he can do it. He lives and breathes this organization.” Messinger asked the task force if she could plead her case to the board, presenting a counter-argument to the consultants. The task force members refused, insisting that the board, not Messinger, should lead the process.

What happened next was a true crisis: Messinger informed the task force that she would withhold assistance in the transition of an externally appointed CEO. It was to be Robert Bank, or she would not offer her full assistance in securing a smooth transition. Given her deep ties to AJWS’ donors and the importance of those donors to AJWS’ financial sustainability, Messinger could be automatically advanced to the finalist stage, where he would then be put in a two-candidate finalist pool with the best outsider candidate uncovered by the search. This strategy would set Bank up as having earned the CEO role and would enable the board to validate its choice should it select Bank by comparing him to other options.
You have to move slow to move fast.

MARCELLA KANFER ROLNICK
recommendation to conduct a national search with Bank as an automatic finalist. “It was hard to argue with the fact that [Bank] was a great candidate,” Levin recalls. “But it was also hard to argue that there might be better candidates out there, and we don’t lose anything by looking for them.” Kanfer Rolnick also recalls board members feeling that if Bank prevailed in a national search, the rigorous process would set him up for success by demonstrating that he had earned the role in an objective contest.

Still, following the task force’s principle of “move slow to move fast,” Levin decided not to raise a formal vote at the first meeting, delaying a decision until the board retreat three months later. Levin and Kanfer Rolnick both had niggling doubts: The disconnect between the research presented by the consultants regarding the strength of insider candidates and their recommendation to not immediately appoint a talented insider candidate caused some cognitive dissonance. Kanfer Rolnick reminded the board that finding great CEOs in any industry is not easy, and that outsiders tend to be disruptive. AJWS wasn’t in need of disruption—it was already in a strong place. And, of course, the board was also concerned that an external search might indeed push Bank to leave for a top role at another organization. The board decided to delay a decision until the next board meeting.

In the interim, the task force dispatched Levin and Dobkin to help re-enlist Messinger’s support. Levin appealed to Messinger’s professionalism by continuing to engage with her in a formal manner, reminding her that CEO appointments are ultimately the board’s decision, and keeping her up to date as the full board meeting approached. At the same time, Dobkin, the task force member who had a close friendship with Messinger, met with her several times in person to discuss the emotions involved in the process. She counseled Messinger that stepping down as CEO was not a retirement, but a transition. There would still be plenty of opportunities for Messinger to contribute, both at AJWS and elsewhere.

Dobkin’s background was uniquely helpful for these encounters: She is a trained social worker experienced in difficult conversations, and she is a major donor of AJWS and many other nonprofits, a fact that gave her an unspoken gravitas as the board’s emissary. The wisdom of involving major donors on search committees is an open question, but in this case, Dobkin’s participation proved invaluable. “The most important thing I learned as a social worker is you start with where your client is, and that’s what I did with Ruth,” Dobkin recalls. “I did not project or lecture. I asked her questions about how she was feeling, and I listened. The extraordinary thing about Ruth is that she’s so smart, she knows the right path
deep down, it just sometimes takes her a while to come to it.”

Marty Friedman, the longtime board member, agrees, remembering that Messinger had undergone a similar shift from resistance to buy-in over hiring Bank as a number two. “She was always hesitant to bring in a COO because she didn’t feel she needed it, but eventually she came around and it worked beautifully.” Friedman could see the same process unfolding with her acceptance of a board-led transition. Asked whether the task force believed Messinger might actually refuse to assist with the transition, Friedman pauses. “We felt confident it would work out, but there were definitely a few rocky moments along the way.”

The New CEO’s Journey

Robert Bank was born in South Africa but emigrated to the United States as a young man, in part to avoid serving in the South African army in defense of the apartheid government. He trained as a classical pianist at The Juilliard School before earning a law degree and dedicating his professional life to promoting civil rights and international justice. Prior to joining AJWS, he had served in the leadership of GMHC, an organization engaged in combating HIV/AIDS. By 2015, Bank held the deep respect of AJWS’ board, but his tenure had not been without challenges. At one point, one of his reports had made a material error in an internal projection that, once discovered, required the organization to make some difficult adjustments to its ambitious plans. But Bank had impressed the board with how he accepted responsibility and made changes to ensure such errors didn’t reoccur. An ambitious, successful nonprofit executive, by 2015, Bank felt ready to take on a new challenge.

In fact, Bank had been interested in leading a Jewish organization before he joined Messinger at AJWS. He had been deeply impacted by his participation in the Selah Leadership Program in 2005 (a program designed for Jewish social justice leaders working in Jewish and secular organizations) and had been offered a CEO position at a local Jewish not-for-profit in 2008. Through the Selah Program, he met Shifra Bronznick, a well-known consultant in the Jewish community. Bronznick, who was consulting for Messinger at the time, suggested that Messinger meet Bank. Having devoted his career to working on HIV/AIDS issues on the local and global stage, Bank was intrigued by the intersection of AJWS’ Jewish values and global social change. He remembered and admired Messinger’s activism when she served in New York City government and ran for mayor. So he accepted the role of number two at AJWS instead of a top role at another organization. He recalls, at the time, he felt that “the chance to work with Messinger at this point in her career is a once-in-a-lifetime opportunity.”
“When I hired Robert in 2009, I told him he didn’t have to worry about becoming CEO because I was never going to retire,” Messinger recalls. “He became the consummate number two because that’s what was asked of him.”

As a CEO candidate, Bank had a lot working in his favor: He had the respect of the staff and the board; he was a reliable internal operator; and he had co-led the formation and execution of the recently completed strategic plan with Kanfer Rolnick. Bank had also built a team of high-performing division heads—personally hiring all five vice presidents—and had demonstrated financial stewardship by building a reserve fund.

The board had no doubt Bank could be a successful internal manager. The question was whether he could step into the limelight that shines on such a public figure in the international NGO and Jewish community. In Messinger’s absence he would need to continue her fundraising record as well as chart his own strategic vision for AJWS. “He had been a great lieutenant but, in so doing, he had never put any light between himself and Ruth,” Friedman explains. In particular, Messinger was a prolific fundraiser and charismatic speaker; the board felt it had a lot to lose if Bank couldn’t display similar qualities.

When the board reconvened for its Q2 retreat in June 2015, Bank was top of mind. The three-month deliberation period had resulted in Bank’s steady competence coming into focus. Levin set aside an entire day for executive session, and in the morning, she divided the 30-member board into six-to eight-person subgroups, and asked them to discuss framing questions such as “What qualities are we looking for in a CEO?” and “What is our goal for AJWS?”

“I’m circling around the tables, and I’m listening, and I realize that each table is talking about Robert, about what qualities he has, about how we need someone ‘like Robert,’” Levin recalls. “So I stopped the break-out session early. I reassembled the entire board, and I said,

Reflecting on his upbringing in South Africa, Bank shared:

"In a very complex environment, there was a small Jewish minority in a country that was a dictatorship with fake democracy. Understanding what it meant to be a white person that discriminated legally against 45 million people, and who were denied the right to vote, had a huge impact."

The Jewish News of Northern California, 2016
‘We are all talking about the same thing. We are talking about Robert Bank.’”

Levin says that every board member—save two—endorsed Bank at that point, a reversal from three months earlier. A few still favored a national search as part of due diligence, but enough of the board worried that a delay would risk losing both Bank and Messinger that the decision was made to move quickly. The board agreed on a compromise: Bank would be brought in for a formal interview where he would lay out a vision for AJWS’ future, and the board would meet with the organization’s key major donors and external stakeholders to see if anyone objected to Bank’s ascension. The executive team would also be interviewed about Bank. If any red flags appeared, a national search would begin.

In a perfect world, one in which Messinger had started planning her transition well in advance—and she and the board had been more proactive in identifying and grooming a successor—Bank may have been given opportunities to demonstrate and develop his ability to handle public and donor relations, as well as his vision for AJWS’ future. Now he had two interviews—one with the task force and one with the entire board—to convince them both of his readiness.

He aced both interviews. Bank remembers the interview with the full board as “a high point of my career—an opportunity to share my focused vision for AJWS’ future with people I knew well but who did not know me in the role of CEO.” Focusing on a core theme of “strategic stability,” Bank promised to continue the trajectory set by AJWS’ strategic plan of which he had been a primary architect in collaboration with the board and staff. He emphasized the strong relations with his senior management team, and the fact that he and Messinger could partner together through the transition to keep major donors in the fold. But he also spoke of opportunities for innovation for the next CEO, focusing on increasing the organization’s ability to demonstrate impact and field leadership; its ability to grow its funding, reputation, and emotional connection with stakeholders; and the need to elevate work on internal culture with greater inclusion of the global staff and a view to sustaining a high level of performance. The board was impressed with his composure during the entire process and his comportment during the interview. While there were still questions about his ability to handle external relations for AJWS, his performance during the interview was a very strong, positive indicator of his comfort and aplomb in high-stakes encounters.

“He never lost one iota of professionalism, even though the process had to be hard on him. We knew he was receiving other offers, which adds extra uncertainty and stress for a candidate,” Levin said. “Yet he handled the interview incredibly well.”
Following his interview, the board approved his selection as CEO. Despite enthusiasm generated by the decision, the board—as well as Bank and Messinger—sensed that the key to his success would be a thoughtful handoff from her. In the private sector, whether new CEOs are hired from the outside or promoted from within, they face daunting odds: One-third to one-half of new chief executives fail within their first 18 months. An effective transition can help tip the scale in the incoming executive’s favor. The board staked out a three-month period from the moment his selection would be announced to the day he would officially begin. It tasked Bank and Messinger to come up with a transition plan together.

What does a successful transition plan look like? There is an old management joke in which a newly hired CEO passes the departing CEO in the hallway, asks for advice, and is told that as crises arise, she should consult two envelopes left in her desk drawer. Six months later she hits her first crisis. Uncertain how to respond, she opens the first envelope and sees the advice: “Blame your predecessor.” Six months later she has occasion to grab for the second envelope; this time it reads, “Prepare two envelopes.”

Bank and Messinger committed to a more thorough process. The first question they addressed was whether Messinger should continue in a formal capacity at AJWS. In general, most leadership experts agree that it is better for a departing CEO to “hand off and ride off” after a transition. But research by the Bridgespan Group published in the Stanford Social Innovation Review found that long-serving, charismatic founders, as an exception, may add value by remaining involved formally with the organization after they step down—“in order to maintain funder, board, and staff loyalty, while allowing the new leader to benefit from the founder’s capabilities and knowledge.” While Messinger was

There is a deep connection between the lessons of Jewish history and the people we are supporting in the developing world. We draw upon those lessons every day.

ROBERT BANK
not technically a founder, the length of her tenure at AJWS and her considerable accomplishments take on many “founder” qualities.

As part of empowering his ascension into the top job, the board told Bank that it was entirely his decision what role Messinger would play moving forward. Bank had seen other organizations create empty roles for departing executives, granting them titles and salaries simply to avoid having a difficult conversation about their departure. He wanted to make sure that he found ways for Messinger to continue to add value to the organization—both for AJWS’ sake and to assuage any doubt Messinger had that she was being asked to “retire.” Following discussions with Messinger, he decided on the role of “global ambassador,” which would involve three responsibilities: continue to work with faith communities, partner with the staff responsible for AJWS’ signature Global Justice Fellowship program that engages rabbis to advocate for global human rights, and continue to support Bank with a small number of funders. The role would be an “at will” appointment, reporting to Bank.

Ensuring Messinger’s continued involvement in the organization also brought unexpected challenges. Bank needed to strike a balance: He wanted to honor Messinger’s tenure and support her ongoing contributions, but he also needed to ensure she didn’t unintentionally undermine him as he established new relationships with staff and external stakeholders. In short, he needed to be seen in a new light and couldn’t risk being overshadowed.

At times, he was forced to take steps to create distance from Messinger. For example, she wanted an office, but Bank felt he couldn’t justify the expense and was concerned that Messinger’s physical presence would confuse the staff. Messinger wanted to retain her executive assistant, but Bank again felt he couldn’t justify the cost. More than a year after the transition, Messinger asked for permission to join the board of an organization supported by AJWS; Bank felt it would create a conflict of interest and denied the request.

As they worked to untangle some of these issues, Messinger approached Bank and suggested they meet with an external executive coach, Matthew Tye. The offer was a generous one—Messinger knew that Tye had been Bank’s long-serving executive coach, so she was offering to meet Bank on his terms. “I had differences with Ruth over the transition process,” Levin says. “But I’ll say this, when it came to the actual handoff, she handled herself beautifully.”

Tye understood that Bank and Messinger were both undergoing major transitions in their lives. But he felt their sessions together would be most successful if they focused not on the deep emotions elicited by the transition but on everyday matters; many of their sessions revolved around the establishment of—and fealty to—a clear timeline for the transition,
with dates set for various handovers and landmarks.

“If people are going to have resistance to anything, it will emerge on the timeline, and the timeline will provide a safe way to explore some of these issues,” Tye explains. “For instance, Ruth initially resisted putting dates to things—basic things like ‘here’s the day you’ll stop coming to the office every day,’ and ‘here’s the date you’ll vacate your office.’ As we talked, it emerged that setting dates was the moment that the transition started to feel real to her.” The transactional conversations around minutia turned out to be the best way for the pair to address the big emotional and psychic issues related to the transition.

Messinger and Bank met with Tye every two weeks and shared emails between meetings when issues arose. Messinger also arranged meetings with key donors and other stakeholders, during which she introduced Bank as her successor in glowing terms. As the date of Bank’s official appointment approached, Messinger suggested another action that Bank would come to view as essential for his success: On the advice of her husband, she volunteered to leave Manhattan for a six-week vacation the day Bank took over. There would be no non-emergency contact with AJWS during that time. “I was lucky. I had a husband who told me, ‘We are going as far away as possible the day this takes effect,’” Messinger recalls. “It was the best thing I could have done for Robert—and for myself.” For several months after she returned, and took on her new role at AJWS, Messinger maintained a physical separation from AJWS; for a period, all of her meetings took place outside of the AJWS offices.

Messinger stepped down in July 2016. At the end of June, AJWS staff arranged a small goodbye party at the AJWS offices. But a month after Messinger returned from her time away, Bank and the board arranged for her to be feted on a larger scale. AJWS hosted a gala that attracted around 550 attendees at Chelsea Piers in New York City. The title of the gala was “Messinger of Hope: A gala honoring Ruth W. Messinger, champion of dignity, justice, and equality.” Rabbi Rick Jacobs, the president of the Union for Reform Judaism, performed a blessing over Bank and Messinger as they held hands. AJWS announced an award in Messinger’s honor and named a Cambodian grantee leader, Sitha Mark, who works on the conditions of women in the garment industry as the first recipient. Leymah Gbowee, the Liberian peace activist and Nobel laureate, gave a speech in honor of Messinger’s leadership, as did the actors Mandy Patinkin and Kathryn Grody. Levin gave the closing remarks.

In the months after Messinger stepped down, Bank made it a priority to meet with each board member on his own, asking them what he could do to improve the efficacy of board meetings. He also scheduled lunch meetings with
Robert without conducting a broader search might have been the ‘obvious choice,’ but it wasn’t obvious to us and only developed organically from much conversation, deliberation, and soul searching,” he says.

It certainly wasn’t always by the book, but AJWS’ board pulled off a successful transition involving a long-serving executive and her faithful deputy. To do it, it needed time and patience—some transitions cannot be rushed. Could it have compressed the timeframe—or saved the main protagonists stress and uncertainty—if it had engaged in earlier and more direct conversations with Messinger about her succession plan, or started viewing Bank as a potential successor earlier? Perhaps. But with such a high-stakes—and high-emotion—transition, all’s well that ends well.

Robert Bank continues to learn on the job, something he’s accepted as part of his acclimatizing to the top role. “One of the best pieces of advice Ruth gave me was that there are certain aspects of this job that you can’t learn until you sit in the seat. And she was right,” he says. “Every day gives me the opportunity to become a better leader and learn something new.”

In 2019, Bank backfilled his replacement, putting in place an executive vice president to oversee the division heads as he once had done under Messinger. The board’s concerns that Bank wouldn’t be able to match Messinger’s fundraising ability have proven unfounded. “He’s been a star for us in that regard,” Friedman says. Bank has continued to build the organization’s strategic focus. In fact, the board and staff have recently completed AJWS’ next five-year strategic plan.

Looking back at the transition, longtime board member Marty Friedman is somewhat bemused by how the process played out. “We thought we might design a different model of leadership, but, in the end, stuck with a more traditional structure. We engaged outside advisors who we thought were excellent and then decided to ignore their advice. In retrospect, choosing

five or six staff a week, until he had personally met with all 140 of AJWS full-time workers. While originally scheduled as a way for staff to feel comfortable with him, these meetings had a bigger impact on him than he had anticipated. “It helped me understand the immense responsibility of managing the organization,” he recalls. He also held a global retreat in which people from 19 countries and all of the states in which AJWS works came to New York and spent a full week together focusing on organizational culture and performance in the workplace.
Request for Proposals - Top Leadership Design: Planning for our Future
American Jewish World Service

Request for Proposals - Top Leadership Design: Planning for our Future

**Background:**

American Jewish World Service (AJWS) is the leading Jewish human rights and development organization working to realize human rights and end poverty in the developing world. We pursue lasting change by providing support to local grassroots and global human rights organizations working in Africa, Asia, Latin America and the Caribbean, and by mobilizing American Jews and others in the U.S. to advocate for policies that will benefit people in the developing world. We focus on three areas of work:

- **Advancing the Health and Human Rights of Women, Girls and LGBT People**
  - We support women, girls and LGBT people so that they can stop violence and discrimination, gain control over their lives and bodies, and live in health, safety and dignity.

- **Promoting Recovery from Conflict and Oppression**
  - We aid communities in their work to recover from conflicts, fight oppression, speak out against injustice, and create vibrant, peaceful societies that respect the rights of all citizens.

- **Defending Access to Food, Land and Livelihoods**
  - We support communities that are protecting the land, water and natural resources that they depend on for survival.

Following the development and ratification of the organization’s first-ever enterprise-wide strategic plan in October 2011, AJWS has been upgrading its top leadership team. The organization is now beginning the process of developing a transition plan for its current President and long-time leader, Ruth Messinger. While Ruth has no immediate plans to retire, AJWS believes thoughtfully assessing its mid-to longer-term leadership needs and options will ensure continuing stability and support its mid- and longer-range aspirations for growth. In addition, developing a plan should help address questions sometimes raised by important external – and internal – stakeholders.

Ruth Messinger has earned tremendous respect and confidence of AJWS stakeholders over her 15-year tenure as the organization’s leader. She has, in many ways, become synonymous with AJWS as, under her stewardship, the organization evolved from a relatively small enterprise ($4.5mm with eight employees) into a robust, internationally acclaimed leader ($50+mm with 120 employees). Ruth has been especially effective in cultivating deep and resilient relationships with external stakeholders: funders, collegial organizations, political leaders and policy makers.

Under Ruth’s leadership, AJWS has attracted and developed a robust Executive Team. As Executive Vice President, Robert Bank has been a very capable partner to Ruth for the past four years. In addition, AJWS now has six strong vice presidents (five of whom joined the organization after the ratification of the strategic plan as part of its implementation) responsible for international programs; national programs; strategic learning, research & evaluation; development; finance & administration; and strategic communications.
AJWS desires to develop a plan to best leverage the strengths of Ruth, Robert and the other members of the Executive Team, and support the organization through Ruth’s inevitable retirement. We believe this project presents an opportunity rich with possibility to go from strength to strength for both AJWS and Ruth, and even further burnish both’s reputations.

Given the highly sensitive nature of this project and the fact that we intend to communicate strategically and intentionally about this effort in the context of the many steps AJWS is taking to nurture organizational sustainability, we expect this RFP and its contents to be kept confidential for now.

Project Specifications:

AJWS wishes to develop a top leadership design for a 5+ year horizon according to a transition strategy and plan. To be clear, we are not looking to implement immediate succession nor do we want no succession activities to happen until the end of five years. Instead, we seek a thoughtful plan that will evolve the organization’s leadership as appropriate over time. Furthermore, no one should infer our current focus on developing a leadership transition suggests we are making specific plans for Ruth’s retirement (in five years or otherwise). We expect the design process will wrestle with all of these issues and the final plan will ideally include mechanisms to adapt to changing circumstances.

We seek a consultant(s) with expertise in executive leadership and succession planning who will work with and report to the Top Leadership Design Task Force of AJWS’s Board of Directors. Members of the Task Force are the current board chair, the immediate past board chair, another former board chair who recently completed his board term, and a member of the board’s executive committee who chaired the strategic planning process. The scope of the engagement is such that the consultant(s) will:

1. Familiarize themselves with the AJWS mission, values, strategy, financials, and brand identity; current organizational structure and background, including bios of Executive Team members; Board of Trustees background; and other relevant information.¹
2. Conduct an internal and external scan tightly focused on the issue of leadership²:
   a. Seek input from current Executive Team (ET) members and understand their potential growth and aspirations. Understand what is working today in the design. Determine competencies needed given the organization’s growth plans.
   b. Learn from other organizations’ successes and failures, in particular those that could be “out of the box” models.
3. Analyze the internal and external scan data and generate multiple design strategy options for top leadership.
4. Work with the AJWS task force leadership and appropriate AJWS stakeholders to recommend a strategy for 5+ years that is accepted by Ruth and the other members of the ET and that:

¹ See Other Information section below for list of types of documents we have assembled to support efficient, effective consultant onboarding to AJWS and this engagement.
² AJWS has done robust strategic plan and implementation over the past few years. The scope of this engagement should not include revisiting the organization’s mission, vision or core strategies.
a. Includes recommended “top leadership” organizational chart and any new/changed role profiles that are documented, unambiguous, and grounded in both others’ learnings as well as the unique attributes of AJWS.
b. Considers other ET members already in place and identifies the qualities of the desired “atom” to fill in the leadership molecule at AJWS.
c. Considers the possible need to have “Time 1” (Ruth in some role, either current or new) and “Time 2” (Ruth’s retirement) designs to reflect any glide pathing the ultimate design (“Time 2”) might require.
d. Includes a sketch (at a minimum) of total compensation for new/changed role(s).
e. Identifies and develops (and/or, in some cases, includes a plan to develop) the necessary preconditions for successful implementation of the strategy, e.g. executive coaching for Ruth, development pathway for any internal team members who might migrate, guiding principles/norms for planned successor’s and Ruth’s ways of working together should the design call for their collaboration, etc.

5. Deliver the Top Leadership Design Task Force with strategy and plan to be ratified by the AJWS Board of Directors at the Board meeting on Monday, March 23, 2015, in New York, NY.

6. Optional: We believe we might find that we are doing breakthrough planning in a time of tremendous leadership turnover in the (Jewish) nonprofit sector. This might create the opportunity to publish a piece in, for instance, Stanford Social Innovation Review and/or eJewishPhilanthropy, or other reputable media outlets, that shares our thoughtful process and reinforces AJWS’s and Ruth’s forward thinking and planning. This could be co-authored by the consultant and members of the task force.

Consultant Qualifications:

The consultant should be an individual or firm that:

1. Has experience in the development of executive leadership succession plans and strategies for nonprofit entities beyond (though not necessarily excluding) executive search. Has experience analyzing and assessing competencies.
2. Has a broad and up-to-date understanding of the current climate on leadership in the nonprofit sector. Draws upon external resources including research, white papers, colleagues, etc.
3. Has a meaningful and up-to-date understanding of human behavior and social/behavioral psychology, in particular vis-à-vis leadership. Draws upon external resources including research, white papers, colleagues, etc.
4. Engages deeply in both the big picture and nuances of AJWS’s needs in a leadership transition process. Thinks whole systems, i.e. attends to all the dynamics this will create rather than just focusing on the most obvious effort of preparing to select a new person to be President.

Read Eric Flamholtz’s article on “leadership molecules” and apply insights to this process:
5. Has a demonstrated track record of working efficiently, discreetly, and in such a way that inspires trust and confidence. Keeps full confidentiality.
6. Will work collaboratively with AJWS’s Board task force and appropriate stakeholders.
7. Comprises team members that can develop an appropriate rapport with Ruth and ET members while retaining objectivity required for a successful process and outcome.

Process:

Individuals or firms wishing to be considered as consultants for this project should submit a proposal by Monday, June 2, 2014, including the following items:

1. A proposed work plan, including timetable and expectations for board, staff, and other stakeholder involvement as deemed desirable/necessary, for completing the assignment.
2. A budget for the project.
3. Assumptions about conditions for this project to be successful.
4. The consultant’s qualifications for the project and, as relevant, specific roles for each member of a firm who would be assigned to the project.
5. A brief description of relevant work performed for other clients.
6. Contact information for 3-5 references who can be contacted about the consultant’s work.
7. Any samples of work that the consultant wishes to share.

All materials may be submitted via email to Joshua Fried at jfried@ajws.org.

Important Dates

1. The deadline for proposals is Monday, June 2, 2014.
2. Prospective consultants will be notified by Wednesday, June 11, if they will be interviewed by the selection team on Thursday, June 19. Final selection of a consultant will be made no later than Monday, June 30.
3. The contract between AJWS and consultant will be signed expeditiously and work will begin immediately.
5. As you consider project pacing in your proposal, bear in mind the following dates currently known to AJWS between now and March 2015:
   a. Office closed for Jewish holiday observance: June 3-5, 2014; September 24-26, 2014; and October 3, 8-10, and 15-17, 2014.
   b. Study tours that key leadership will be out of the country for: June 21-29, 2014; November 1-9, 2014.
   c. Many key stakeholders will be vacationing at some point in July and August.
Other Information

1. Board must have the opportunity to reflect on findings from scan as well as emerging design
directions prior to the March 2015 board meeting where we will request final recommendation
ratification.
2. We anticipate that all in-scope activities will be completed within the period of the contract.
   Follow-on support for the implementation of the strategy and plan may be desired; this will be
   scoped separately as needed.
3. All in-person meetings will be convened in New York, NY. For those not in NY, phone- or video-
   conference interviews can be set up.
4. The consultant’s logistics/administrative contact will be Joshua Fried (jfried@ajws.org). There
   will be one task force member serving at the consultant’s main point of contact on the
   substance of the engagement.
5. The types of documents that AJWS has assembled to support efficient, effective consultant
   onboarding includes:
   a. Strategic Plan and inputs into the plan, e.g. Environmental Scan, Trend Analysis
   b. Organizational Chart
   c. Executive Team Background
   d. Board of Trustees Background
   e. Bylaws
   f. Governance/Board Development documents
   g. Sample Major Donor Proposals and Reports
   h. Financial Statements & Current Budget
   i. Prior Organizational Reports, Results & Budgets
   j. IRS filings

Inquiries related to preparing this RFP should be directed to Joshua Fried via email. Prior to submitting a
written proposal, candidates may request written responses to emailed questions and/or telephone
conversations.
A gala honoring Ruth W. Messinger, champion of dignity, justice and equality
APPENDIX - GALA PROGRAM TO HONOR RUTH MESSINGER

INTRODUCING THE RUTH W. MESSINGER FUND

Since our founding 30 years ago, steady fundraising and fiscal integrity have brought us to our current place of strength. Now that we are entering our fourth decade, we are building a reserve fund to propel AJWS into the future.

The Ruth W. Messinger Fund—a reserve equal to half our annual budget—will provide stability for our work to promote human rights in the developing world and increase our ability to respond nimbly to disasters, address critical challenges and seize extraordinary opportunities.

We are grateful to our early leadership donors, who have helped us reach over $13 million of the $18.3 million goal.

Ruth has transformed millions of lives by leading AJWS through 18 years of remarkable growth. You can transform millions more by securing AJWS’s future sustainability.

EARLY LEAD DONORS

Dr. Marion Bergman & Stanley Bergman
Charina Endowment Fund
Cynthia & Jay Cohan
Dobkin Family Foundation
Lori Olenick Dube & Monte Dube
James Dubey
Eileen & Richard Epstein
Lois & Dick Gunther
Jacob Friedman
Charitable Fund
Barbara Jaffe & Howard Langer
Carol M. Joseph
The Kendeda Fund
Klarman Family Foundation
Pamela Klem & Thomas Dubin
Catherine & James Koshland
Bruce & Lori Laitman
Rosenblum
Kathleen & Richard Levin
Daniel Messinger & Batya Elbaum
Joanne Moore
Bill Resnick & Michael J. Stubbs
Amy & Eric Sahn
Kay & Stanley Schlozman
Judy & Jack Stern
Bea & Sam Wilderman

*List in formation
APPENDIX - GALA PROGRAM TO HONOR RUTH MESSINGER

MESSINGER OF HOPE

WELCOME
EILEEN EPSTEIN, Gala Chair

BLESSING
RABBI RICK JACOBS, President, Union for Reform Judaism

REMARKS
ROBERT BANK, President and CEO, American Jewish World Service

AWARD PRESENTATION
THE RUTH W. MESSINGER AWARD
For outstanding contributions to social change
Presented to CHANNSITHA MARK,
Coordinator, Workers’ Information Center, Cambodia
Presented by KATHRYN GRODY, Actress and Writer

HONORING
RUTH W. MESSINGER,
Global Ambassador, American Jewish World Service
For 18 years of visionary leadership and extraordinary commitment to social justice
Presented by LEYMAH GBOWEE, Nobel Peace Prize laureate and Director, Women Peace and Security Network Africa

LIVE AUCTION
ABRA ANNES SILLS, Founder, Generosity Auctions

PERFORMANCE
SWEET HONEY IN THE ROCK
Grammy-nominated female African-American a cappella ensemble

CLOSING
KATHLEEN LEVIN, Chair, AJWS Board of Trustees
L’CHAIM – CELEBRATING 18 YEARS OF RUTH MESSINGER

Ruth/AJWS staff party
Tuesday June 28, 2016 | 3:00pm-5:00pm eastern
11th Floor Conference Room | Dial In: 1-877-647-3411 | Passcode: 847450#

2:00 – 2:45 Staff set up

3:00 – 3:10 Staff assemble in room, get food
Music playing

3:10 – 3:20 Robert welcomes and frames
Theme
First toast

3:20 – 3:25 Lilach and Joshua welcome
Food, fun, roast

3:25 – 3:30 Comms gala video

3:30 – 3:40 Finance & Administration

3:40 – 3:50 Development

3:50 – 4:00 Tier 1

4:00 – 4:10 B-roll or food break

4:10 – 4:20 SLRE

4:20 – 4:30 Communications

4:30 – 4:40 Programs

4:40 – 4:50 Ruth speaks

4:50 – 5:00 Staff toast and gifts
Tzedakah box: Allison Lee
Staff notes: Joshua
Trip: Stefanie and Robert

5:00 Formal program ends
CASE STUDY 02

BEND THE ARC
For Stosh Cotler, it was a lightbulb moment. As the long-tenured executive vice president at Bend the Arc, a national progressive Jewish organization, she had been told by the board that it wished to consider her for the role of chief executive officer, a position that had recently opened up after the incumbent CEO announced his departure to another nonprofit. Would Cotler be willing to throw her hat in the ring?

Cotler was a logical pick: A talented insider who had overseen the implementation of a recent merger, she had deep institutional knowledge, a strong relationship with the board, and the respect of the staff. But Cotler wasn’t interested in occupying the corner office, nor did she see herself as CEO material. She had doubts: Do I even want to be a chief executive? I’ve never done a job like this before. I don’t have the experience I need. What if I fail?

According to research conducted by Leading Edge, the American Jewish nonprofit workforce is comprised of approximately 70% women and 30% men. The CEOs, however, are 30% women and 70% men. Gender parity and minority representation in leadership roles remain a challenge throughout society—including in corporate offices and boardrooms, as well as in government. The reasons for the glass ceiling are numerous, and they include deep societal biases that hold women back. But too often, talented female candidates are passed over for the top job because they themselves decide to opt out as a result of a lifetime of societal messages convincing women that they are not leadership material.

Eventually, Cotler would decide not to join the cohort of overlooked talent; she agreed to put herself forward and was selected as Bend the Arc’s new CEO in 2014. By all accounts, her tenure has been a success thus far. Her journey from a hesitant number two to an assured
CEO holds lessons for any organization wishing to ensure it finds the best candidate to fill the corner office.

Risk Aversion

Hundreds of academic studies have shown that women are, in general, more averse to risk than men—which is a main reason why they may be reluctant to put themselves forward for demanding CEO roles. In one study, Sarah Fulton, an associate professor of political science at Texas A&M, asked state-level legislators how high the odds of winning would have to be for them to consider running for Congress. She found that for women, the odds had to be at least 20%. Men, on the other hand, were willing to jump into a race if the chance of winning were larger than zero.

Cotler dreaded the idea of failing as CEO. But her fear wasn’t focused around damage to her reputation. She felt protective of the organization. “I had given years and years of my life to [Bend the Arc] and that put a lot of pressure on me. I actually felt way more concerned about the organization’s well-being and I didn’t want to lead it to failure,” Cotler explains.

What’s more, Cotler was good at her existing job—and she enjoyed it. Preceded by two charismatic male leaders, Cotler assumed that the CEO role at Bend the Arc was fixed rather than malleable. “There were aspects of the job that were not attractive—that just didn’t really interest me,” Cotler explains. “I didn’t realize that while these would always be a part of the job, it didn’t have to be the main part of the job.” Amy Wrzesniewski, a professor at the Yale School of Management, has written about this concept of job crafting, a process of shaping work experiences such that work can become more meaningful and enjoyable.

Over time, Cotler also came to realize that the priorities that the next CEO faced at Bend the Arc aligned well with her existing strengths. Having changed CEOs twice in a span of three years, the board “wanted the continuity of someone who knew the organization backwards and forward,” explains Steve Rohde, who chaired the board at the time of Cotler’s appointment. “We knew she had great respect and love from the staff and that was very important to us.”

Rabbi Felicia Sol, who served on the board at the time of Cotler’s selection, agrees that the leadership needs had changed for the organization. It had been three years since Bend the Arc had formed through the merger of the New York-based Jewish Funds for Justice and the West Coast-based Progressive Jewish Alliance. “Initially, our CEOs were dashing around doing fundraising or focusing on acquisitions and someone internally had to do the work—that ended up being [Cotler]. She had the deep relationship with staff, and the board felt that was important given all the recent upheaval.”
But Cotler still had doubts about her ability to be a CEO. Research suggests that over-ambitious job descriptions depress interest among female candidates. The hero status often bestowed on CEOs can give the impression that the job is immense and requires superhuman talent. That image tends not to deter men, who often feel confident in their ability to fill gaps in their skills and experience. Women, on the other hand, can be discouraged if they don’t have all the qualities or experience seemingly required of a CEO. Cotler admits that she had this reaction when considering the CEO role at Bend the Arc. “Women go through a job description and if we don’t feel like we can do everything that is listed, we don’t apply. I know this is a danger, but I still did the same thing at first; I couldn’t help it.”

Cotler says that a breakthrough came when she spoke with a male CEO who was moving to a larger organization that required experience handling real estate finances, an area of expertise that he didn’t have. Cotler asked him about whether that worried him. He replied, “I’ll learn.”

“I realized I didn’t think this way. But there’s no reason that I shouldn’t have the same optimistic view of my ability to learn and grow,” she says.

**It Takes a Village**

In 2004, Cotler had been in one of the first cohorts of a Jewish leadership training program (which evolved into the Selah Leadership Program, now administered by Bend the Arc). Along with the knowledge imparted through instruction, such leadership training programs promote gender equality long after they are over through the power of their alumni networks—as female graduates rise within professional ranks, they bring other graduates up with them by acting as supporters and advocates. As she considered the CEO position, Cotler called on a variety of people in her professional network for advice; she particularly remembers an important dinner with a colleague at Bend the Arc who had been in her Selah cohort. “I told him I was thinking about putting my name forward for

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The American Jewish nonprofit workforce is comprised of approximately 70% women and 30% men. The CEOs, however, are 30% women and 70% men.
We spoke about how her fixation on her weaknesses was something that women tend to internalize and that it holds women back.

RABBI FELICIA SOL
tenacious in doing training, reading, studying, examining other leaders.” Alan van Capelle, the outgoing CEO, also encouraged Cotler to apply.

**A Nontraditional Candidate**

Cotler was the board’s leading candidate—but when she decided to put herself forward for the role, the board still did its due diligence through an extensive interview process (it put a wider search on hold while assessing Cotler). Cotler recalls that, paradoxically, its probing reassured her. “They didn’t hold back, they didn’t coddle me, they didn’t make it a rubber-stamp interview, which I deeply appreciate,” she recalls. “I came really prepared and I wanted to make sure for my own sense of confidence that I wasn’t being hired because it was the easy thing to do but because the board believed that I was the best choice.”

During and after the interview, the board also offered feedback to Cotler, which again reinforced her confidence. “They gave really effective feedback because it was specific. They didn’t just say ‘your answer was excellent;’ they would say ‘it was when you spontaneously made that comment that helped us understand your perspective—that was really excellent,’” she recalls.

In January 2014, Bend the Arc announced Cotler’s selection as its next CEO—making her one of the first female CEOs of a large national Jewish organization. But Rohde says gender wasn’t a consideration at all during board discussions. “What mattered to us as a board was that we could elevate and promote a superb candidate from within the organization, just straight out,” he says.

Nonetheless, Cotler’s background drew attention from the Jewish press. The Forward published an article titled “Bend the Arc Leader Stosh Cotler has Radical Streak—and Black Belt,” which recounted, among other colorful details, that Cotler was a sex worker in her 20s and had only discovered Judaism when a lesbian couple whom she had performed for at a strip club invited her to their Passover Seder. Cotler had always been open about her unconventional profile—and has defended it as one of her strengths. “It’s part of my life, part of my story, I’m not ashamed about it, and the board knew it’s not something I would ever hide,” she says. “If we want to have people in leadership roles that are different than the ones we have now, it means we need to open ourselves to the possibility that people’s lives have been different as well, and that’s a good thing.”

Rohde says the Bend the Arc board was aware of Cotler’s unconventional background and felt confident in its choice because the board’s own diversity of constituents made it a good proxy for the progressive Jewish community writ large. “The board at the time was composed of people
with a range of experience, age, and geographic diversity—we felt we were highly representative of the progressive Jewish community,” he says. “Our test was, can she be an effective leader? Through that lens, her personality, her unorthodox background, her experiences in life and within the organization all became a plus.”

Over the long term, the board’s belief in Cotler (and her belief in herself) has been validated by her successful tenure at Bend the Arc. Shortly after her appointment, Cotler received a high-profile external accolade as well: She was included in the “Forward 50” list of Jews who have had a profound impact on the American Jewish community over the past year. “Tell someone to picture the CEO of a Jewish not-for-profit organization and they probably won’t envision a woman with a tattoo, a black belt in kung fu, a history of demonstrating against Israeli policies, and experience dancing at a sex club. But Stosh Cotler has all that and more,” the Forward wrote in its nomination. The write-up also included an endorsement from Ruth Messinger, then president of American Jewish World Service (AJWS), who applauded Cotler’s “responsive, out-of-the-box thinking.”

**The Importance of Insiders**

The bias against women during CEO searches is powerful and deep-seated. For example, research shows that when you ask people to draw a leader, they sketch a picture of a man. Dispelling gender bias during an external search—when interactions with candidates are relatively brief—can be extremely difficult. For this reason, many proponents of gender equality believe that the promotion of talented insiders can help ensure women aren’t passed over for more traditionally charismatic male candidates.

For his part, Rohde supports this view. “Our search at Bend the Arc inspired me in other situations to think about the value of a promotion from within the organization,” he says. “The pool of internal senior leaders just below the CEO is filled with competent women. By looking internally, you probably will be identifying female candidates who have hit a glass ceiling, who have not been nurtured, who have not themselves even envisioned being a top dog. It’s a resource that needs to be tapped.”

Five years into her tenure, Cotler is now a confident, successful CEO, but she’s still bucking trends—she recently took a three-month sabbatical during which she deputized two women who, with Cotler, form a three-person executive team that runs the organization. (Sabbaticals, while supported by research as a means of spurring strategic thinking and keeping executives engaged, are still not widely adopted.) Since becoming CEO, Cotler has grown the number of chapters in U.S. cities from three to 16, the staff from 22 to 50, and the budget from $3.5 to $7.5 million, all supported by a
major increase in the number of donors to the organization. Her experience as a reluctant insider turned powerhouse CEO continues to shape her leadership, however. In recent years, she’s invested more in staff training and development, which she sees as closely linked with Bend the Arc’s internal diversity efforts.

“Our goal is to help our staff with capacity-building and skill-building, and we’ve connected our training programs with the goal of building our staff’s confidence,” Cotler says, before pausing. “I know firsthand how important that can be.”

EPILOGUE

Lay leaders have a responsibility to work with the executive staff to identify high-potential employees. This often means reaching deep into an organization to form direct relationships with executives below the C-suite. At Bend the Arc, the board’s stroke of genius was identifying a possible CEO—even before she saw the leadership potential in herself. Then it gave her the time and resources to build her experience and confidence. To ensure that the best candidates are emerging into leadership positions in the Jewish community—regardless of their gender or background—boards should do everything they can to make sure they are not overlooking talented insider candidates.
APPENDIX: STOSH COTLER’S FORWARD 50 PROFILE

Stosh Cotler

Tell someone to picture the CEO of a Jewish not-for-profit organization and they probably won’t envision a woman with a tattoo, a black belt in kung fu, a history of demonstrating against Israeli policies and experience dancing at a sex club. But Stosh Cotler has all that and more.

Cotler, 46, took over as CEO of the progressive organization Bend the Arc in February. That in itself is a rarity: Few Jewish communal organizations not specifically devoted to women’s issues are headed by women. Cotler, who identifies as queer, is also an unusual choice in that she didn’t get involved with Judaism until her late 20s. She recounted in the Forward how it was only when a lesbian couple invited her to their Passover Seder that she discovered “that being Jewish could be revolutionary.”

Cotler sees her unconventional background as an asset that can help attract Jews “who have little or no or an ambivalent connection to being Jewish.” Other female CEOs in her orbit agree: Ruth Messinger, president of American Jewish World Service, has applauded Cotler’s “responsive, out-of-the-box thinking.”

Bend the Arc, which advocates for liberal causes like workers’ rights and immigration reform, has been Cotler’s professional home since 2005; she served as executive vice president for the past three years. But her experience fighting liberal battles stretches back to her time as an activist in Portland, Oregon, where she designed programs to train women in self-defense and empower local girls. In many ways, Cotler was a natural choice to helm this organization.
Combined Jewish Philanthropies (CJP) is the third-largest Federation in North America. In 2017, it invested over $64 million in the community and managed an endowment of $1.76 billion with a staff of nearly 170 full-time employees and 800 volunteers. Excluding universities and hospitals, CJP is the largest nonprofit in the greater Boston area.

On the morning of January 18, 2018, the board of Combined Jewish Philanthropies assembled for what would be one of the most important meetings of its tenure. In fact, it would be a momentous day for the entire American Jewish community. At the time, Barry Shrage, CJP’s then CEO, was preparing to step down after a 31-year tenure at the organization. It was at this meeting that the trustees were to receive an update on the search for his successor.

Per standard protocol, board members expected the update to come from Neil Wallack, the board chair who also served on CJP’s 11-person search committee. They assumed he would present the names of a handful of finalists selected by the committee for the full board to interview. Instead, something dramatic happened. The other members of the search committee shuffled into the room and lined up behind Wallack.

The board must have felt the same sense of awe and appreciation that local Boston fans experienced watching the 2018 Red Sox take the field. This, too, was a team of all-stars: three CEOs of multibillion-dollar companies, two partners at leading private equity firms, the founder of an asset management firm with billions under management, and two emerging leaders in their 30s.

However, instead of presenting a list of finalists, Wallack told the board that the committee wished to put forward a single name—Rabbi Marc Baker—and suggested the board hire him without interviewing
anyone else. Baker was the head of school at the prestigious Gann Academy in a suburb of Boston. He was clearly qualified and known to many of the board members as a high-profile member of the Boston Jewish community. Still, presenting his name alone was a bold recommendation.
But it was a unanimous one, the result of one of the largest searches in the history of Jewish organizational life. Over the past year, the committee—and the search consultants who supported it—had screened over 500 candidates, surveyed tens of thousands of stakeholders, and met in person with representatives from dozens of groups and communities in CJP’s ecosystem. It had done so with unusual transparency—regularly fielding phone calls and emails from members of the public, and providing updates on the search on a specially launched website and through presentations to the board.

“We knew it was very unusual to bring non-board members into a board discussion like that, but I wanted the board to understand what a breadth of talent had been involved, and the intense process. I sensed that their personal presence would be key,” Wallack says.

Few organizations in Jewish life can match the scale and scope of CJP’s search—or the pedigree of its search committee. But in assembling a team of all-stars—and then executing a search with precision and professionalism—CJP’s board provides a model to which all organizations can aspire.

For four days after the search committee’s presentation, Baker met with the board for a series of interviews. Wallack spoke on the phone with each board member, too. When the board reconvened for a formal decision on whether to accept the committee’s recommendation to hire Baker, the vote was taken by roll call. Slowly, as each of the 40 trustees was called and asked to vote on whether to hire Baker, thoughts flashed through Wallack’s mind. With such a high-stakes decision in front of the board, Wallack couldn’t suppress some last-minute nerves.

Did we assemble the right people to lead the search? Wallack found himself wondering.

The first reply rang out through the room. “Yes.”

The hair on the back of Wallack’s neck stood up. His mind raced faster as the next name was called.

Did we stay true throughout the process to the vision laid out in our recent strategic plan? Wallack questioned.

“Yes.” Another jolt.

Did we manage to avoid groupthink and make clearheaded decisions as a committee?

“Yes,” he heard again.
As the roll-call vote unfolded, Wallack’s mind unclenched. His doubts slipped away.

“Yes.”

He felt a tingling elation course through him.

“Yes.”

“Yes.”

“Yes.”

Picking the Search Co-Chairs

The story of CJP’s CEO search begins shortly after Wallack took over as chair of the board in 2014. He and Shrage were eating breakfast together one morning when the long-serving CEO told Wallack of his desire to step down from a leadership role. Shrage wasn’t thinking of retirement—indeed, today he serves as a professor at Brandeis University—but he no longer wanted to run a large organization. The decision did not come as a surprise to Wallack, as the board had been discussing Shrage’s possible departure for some time. To lay the groundwork for a smooth transition, Shrage was offered a long runway of serving another two to three years.

Wallack and the board favored an external search because there was no obvious successor-in-waiting and because a recent study had revealed significant changes in the community over the past 10 years, including re-urbanization, significant shifts in denominational affiliation, and a growing diversity of backgrounds, including an increase in interfaith families. While academic research suggests that insider CEOs generally outperform external appointments, the exception is during periods of organizational change. The board decided to cast a wide net and launch an international search to find a CEO capable of leading CJP into the next chapter of its success.

To begin the external search, Wallack and the board had to decide whether to appoint an external search committee. CJP had long run a subcommittee called the organizational development committee, which focused on high-level HR issues, including CEO evaluation and succession planning. This subcommittee was composed of the most recent board chair as well as other former chairs and other highly seasoned volunteers at the organization, and had begun raising the issue of Shrage’s potential departure in the years leading up to Wallack’s ascension to board chair. But for the same reason it favored an external search, the board decided that a search committee composed of non-board members would be best placed to handle the transition—and to give the Boston Jewish community confidence that the board was forward thinking and responsive to CJP’s changing composition and needs.

Identifying a search chair is the first, and most important, step in assembling a search committee. Wallack decided
BEST PRACTICES: CHAIR OF THE SEARCH COMMITTEE

The role of the search committee chair is of extreme importance. According to Bridgespan, the chair must be:

- A strong leader;
- A consensus builder;
- An effective communicator; and
- A person who has the time and dedication to see the search through to completion.

...
let alone an active CEO. But Wallack had a few tricks up his sleeve. First, he made a straightforward case to them both about the impact of the role—the board was looking for someone to lead the Jewish community in Boston for the next several decades, so chairing the committee was a highly leveraged way to support Boston’s Jewish community. Then, Wallack used a more mischievous tactic. “I knew they had deep respect for each other and had worked together,” Wallack says. “I think one of my most proud moments was the trick of saying to each of them, ‘The other will do it, but only if you do it.’”

The ploy worked. “I’ve been trying to do less of these things,” Ain recalls. “But this was a 20-year decision for our community. We have to hire the right person. And I love working with Shira, so in the end, it was an easy decision.” Goodman agrees. “Whenever we served on committees together, it had led to lively discussion and debate—so I knew we would work well together,” she says.

Over the course of the six-month search, however, both Ain and Goodman’s commitment would be tested. Throughout the search process, Goodman helped take Staples private, while Ain oversaw the launch of a major new product line at Kronos—but both covered for each other when needed. And, more importantly, they created a deep bench of talented support by hiring a world-class search firm and assembling an all-star search committee.

**The Right People Drive the Right Process**

Ain and Goodman agreed that they—along with Wallack and Cindy Janower, the incoming board chair—would form a “core four” of search committee members. “Aron and I felt strongly that we wanted board representation on the committee—this was a board decision after all,” Goodman explains. Before inviting any additional search committee members, the quartet agreed to hire a search consultant and ask for advice regarding the optimal size of the committee. Ain had recently finished serving on the search committee for the president of Hamilton College and felt it was a well-run search overall. But he also felt that the committee—comprised of 18 people—was too large. Goodman’s experience also led her to believe that smaller was better when it came to assembling a search committee. “A lot of committees turn into the United Nations; I need a representative from here, and a representative from there, and so on,” she says.

This posed a dilemma—CJP serves and represents a diverse constituency with a variety of stakeholders. It also has many large donors. It was likely that there would be many influential individuals clamoring for a seat at the table. “One of the reasons we engaged the search firm is that we felt its recommendation could give us cover if we started to feel pressure to grow the committee,” Ain explains. “We could point to its
recommendation.” After interviewing finalists and checking references, the core four hired Spencer Stuart.

They also introduced another way to keep the search committee small: All members should have experience assessing and hiring talent. An exception was given for any members of the “next generation”—emerging Jewish leaders who would introduce a valuable perspective but do not yet have the requisite managerial experience. This “must have” criterion provided a convenient screen to winnow down the pool of candidates for the search committee.

Still, the question of whether—and how—to tell major donors that they did not have a spot on the search committee was a delicate one. “At the end of the day, we wanted to be sure that we weren’t going to make a decision that would cause our major funding base to rethink their support,” Wallack says, “so we wanted to be conscious of their presence, but not necessarily on the committee.” In 2017, the year of the CEO search, 19 donors had each given over a million dollars to CJP. As the group of four began assembling the search committee, Ain and Goodman either called or met with all 19 donors and discussed the rationale for keeping the committee small.

“We would tell major donors, ‘We can include you on the committee, or we could talk to you along the way, and let Aron and Shira and the committee handle it,’” Wallack recalls. Typically, the donors were more than happy to entrust the process to Ain and Goodman. It also helped that the committee they assembled instilled a great amount of confidence. “I think that helped overcome concerns and made it easier for us,” Ain says.

There will be no spectators on this committee.

ARON AIN

Ain and Goodman promised their recruits that they would operate the committee efficiently, but they were also realistic about the amount of work that would be required. In addition to the core four, the committee was eventually comprised of seven additional voting members:

- Bradley Bloom, founder of Berkshire Partners, a private equity firm
- Diane Exter, founder of Bain Capital Credit
• Joanna Jacobson, founder of one of the world’s most high-profile venture philanthropy organizations

• Neal Karasic, senior vice president at SavingStar, a digital grocery coupon service

• Daniel A. Kraft, president of Kraft Group International, a multibillion-dollar private holding company based in Boston

• Ari Freisinger, an investment analyst at Highfields Capital and a “next generation” leader at CJP

• Lara Freishtat, an HR business partner at the health care technology company athenahealth and a “next generation” leader at CJP

Laying the Ground Rules

Research shows that when it comes to group decision-making, a certain amount of discussion—and even tension—within a group is healthy. All teams are prone to groupthink, but paradoxically, teams of all-stars are particularly susceptible because of the risk of overconfidence in their abilities. From the outset, Goodman and Ain agreed that the committee should have a gender balance and a diverse mix of ages to help encourage heterogeneous thinking. Goodman had watched searches at other federations that used all-male search committees. “What that tells me is that they’re not looking to shake things up. The literature is clear: Diverse groups make better decisions.”

The pair also articulated ground rules to help assist decision-making. For their first meeting together, Ain invited the search committee to his home for dinner, where he spoke about group dynamics. Not only did he want all committee members to form their own opinions, but he also encouraged them to remain flexible and have the courage to change their minds. He said that everyone should have the confidence to offer a dissenting opinion—even if the rest of the group might disagree. In short, playing devil’s advocate should be congratulated by the group. His bottom line: “There will be no spectators on this committee.”

Ain and Goodman reinforced these ground rules as time went on. Ain recalls the first time a committee member acted in a contrary manner. He pulled her aside after the meeting to congratulate her. “I said, ‘Thank you for doing that. Can you keep doing that? I know it takes a lot of courage for you to battle 10 other people, but I’m asking you to do that every time you feel that way. Force us to defend our point of view.’” In fact, multiple committee members told Ain that after the search was complete, they planned to adopt his and Goodman’s “no spectators, all opinions welcomed” rule at all meetings they ran in the future.

Ain and Goodman also modeled this behavior. Ain is a proponent of what he calls the “un-leader.” “They put employees first,” he explained in a recent press interview to promote his
book, “WorkInspired: How to Build an Organization Where Everyone Loves to Work.” “They downplay the status that comes with their titles, preferring to put team members on the same level as they are. They show basic respect. They admit when they don’t know the answer to a question. This is not to suggest that they are ‘people pleasers.’ They know how to step up and exert their will when they need to.”

Goodman agrees: “Both Ain and I know the CEO-type who thinks the sun rises and sets on them. I can definitely say that’s not true for Aron and I’d love to think that’s not true of me. We left our CEO titles at the door and focused on getting the best out of the committee members and each other.”

Looking back on his interactions with the search committee, Marc Baker, the eventual hire, recalls that “things got real very quickly” in their first interview—with the committee probing him with direct questions, encouraging honesty from him, and reciprocating with their own. Baker remembers an informative and productive meeting that reflected well on CJP—a testament to Ain and Goodman’s team leadership.

**Putting the COO on the Committee**

It is generally considered best practice not to include staff members on search committees. It can be difficult for staff to be objective about the requirements for the incoming CEO, and it risks undermining the new hire if staff are part of sensitive candidate evaluations. But that practice isn’t universally adopted. In Germany, for example, all corporate boards contain labor representatives who are often employees. Against the advice of the consultants at Spencer Stuart, Ain, Goodman, Wallack, and Janower decided to invite CJP’s chief operating officer, Judy Shapiro, to join the search committee. They included a caveat: Although Shapiro would participate in interviews and post-interview discussions, she would not have a vote.

The core four felt that Shapiro qualified for the committee for several reasons: First, she had no ambitions for the top role; second, she had strong project-management skills that could help keep the committee on track; and third, she was well-respected by the professional staff of CJP. Just as Ain and Goodman would perform outreach to external stakeholders, Shapiro’s presence allowed for a form of “in-reach,” in which she could liaise with staff as the process unfolded. “Anytime you replace a long-serving CEO, there will be some anxiety among staff,” Wallack says. “People would ask questions, ‘How are they really doing this? It’s really the big donors that are deciding, isn’t it?’ She could come back and give staff confidence that the search was being professionally run.”

Shapiro’s presence also allowed the board to test its thinking against a staff perspective. “We could call upon her
BEST PRACTICES: USING A SEARCH FIRM

Not all search committees need to use a search firm—but they do bring certain advantages, such as a network of potential candidates, an ability to provide third-party objectivity, and an ability to reduce the time commitment needed from search committee members. Search firms can also seek out candidates who might not be actively looking for a new role and so would otherwise not respond to job postings.

In his book “It’s Not the How or the What but the Who,” Claudio Fernández-Aráoz of the search firm Egon Zehnder recommends only using executive search firms that don’t use contingency arrangements or charge percentage fees, which he believes create perverse incentives.

Outreach

Before crafting a job description, search committees or their executive search consultant should involve important stakeholders in a conversation about what sort of candidate the organization needs. This serves a trifold purpose:

- First, it uncovers challenges and opportunities of which the board may previously have been unaware.
- Second, it provides major stakeholders such as staff, clients, partners, and donors the opportunity to feel heard and included, and to voice hopes, dreams, and fears about the future.
- Finally, it helps ensure stakeholder buy-in and support for the new CEO when they are eventually appointed.

One executive search consultant who frequently undertakes searches for Jewish nonprofits compares CEO successions to marriages or funerals—momentous events that either splinter or heal communities. “It’s not exactly like therapy, but it’s close,” the consultant says.

at various points and say, ‘Well, what do you think? How will this feel inside the organization?’” Wallack says. “She has a deep understanding of what goes on within [CJP] and we knew she was a balanced enough person that she wouldn’t push too hard for a particular type of candidate.”
From the outset, Ain, Goodman, Wallack, and Janower made a commitment to ensure that all CJP stakeholders felt heard in the process. “We had just finished a strategic plan that said that our community was evolving, and we needed to move with it, so from that it followed that we needed to reach out to a wide and diverse group,” Wallack explains.

The outreach took two forms: First, Ain and Goodman built a virtual open-door policy. With the help of Spencer Stuart and CJP staff, they launched a website dedicated to search updates for members of the public. They used the website to introduce the members of the search committee, make the job description public, detail opportunities for public engagement, and, eventually, announce Marc Baker’s appointment. Ain and Goodman took turns updating the website with “letters to the community.”

They also provided an email address on the website through which people could reach the search committee. While the incoming email was monitored by Spencer Stuart, Ain himself fielded dozens of messages and calls. Most of them were recommendations for potential candidates. Handling these calls required diplomacy, as callers felt invested in their referrals and convinced they would be the right choice. “Anyone who called me I talked to,” Ain says. “So somebody would call to say, ‘Oh, Yakamflatch Jones, he’s from Arizona, I winter there, he’s the greatest.’”

‘Gobbledygook Smith from Ottawa, you’ll never find anyone better.’ I would thank them and put the name in my notebook. And you know, we reached out to every single one of these recommendations. We got some great names through that process.”

Throughout the summer of 2017, the committee also engaged in extensive outreach to various stakeholders. Spencer Stuart spent the day at CJP offices meeting with staff to understand their views on what would make a great future leader. To tease out insights, the consultants asked three questions:

1. What makes CJP distinctive?

2. If you could put yourself in a rocket ship and go forward six years, what is different about the organization that makes it even stronger than today?

3. Bearing in mind your answers to the first two questions, what qualities should we be looking for in our next president?

The search firm also led conversations with various individuals and groups that represented community leadership. This included conversations with heads of the partner agencies, former board chairs of CJP, heads of Jewish day schools, the Massachusetts Board of Rabbis, CJP board members, and representatives from ethnic groups such as Russian-speaking Jews and Israelis. Ain and Goodman set a goal of
having at least one committee member attend each meeting. To ensure no voices were missed, Spencer Stuart built an online survey that went out to an email list of more than 25,000 CJP supporters and interested individuals to solicit additional feedback.

“One of the most important things that Shira, Aron, and the whole committee did from the beginning was really send the signal that they wanted to hear from all the important groups and stakeholders,” Mary Gorman, a Spencer Stuart consultant, recalls. “We did a very broad outreach.”

Gorman adds that although committee members were present for most of the meetings, there were some that Spencer Stuart recommended they do on their own without committee members. “For example, when we spoke with the heads of agencies [that receive funding from CJP], we felt they could be more forthcoming without any fear, justified or not, about how CJP representatives might hear or interpret their feedback.”

Crafting the Job Description

Ain, Goodman, Wallack, and Janower felt that writing the physical job description—or “position and candidate description” as it would come to be known—was one of their most important tasks. Indeed, when they interviewed search firms, they asked to see previous job descriptions from each firm as part of their screening process. The community outreach was intended to inform the document.

A CEO transition provides an organization with a unique opportunity to take stock and do a strategic review. However, experts disagree about whether it is best practice to delay a formal strategic planning session until a new CEO is in place so as to ensure they are able to contribute meaningfully to the strategy without feeling handcuffed by the board’s decisions. In CJP’s case, the board had decided to undertake a strategic plan in 2016 even though it knew of Shrage’s upcoming departure.

“We kind of debated back and forth about whether we should hire a new president and then do the strategic plan, or vice versa. There’s probably no great answer to that, either can work,” says Goodman, who was chair of the strategic planning committee. “If you’ve done your strategic plan, you know what you’re looking for. So we knew we were looking for change. We knew we were looking for an innovator, someone who could relate to the next generation. That was very helpful.”

Goodman adds the strategic planning committee intentionally made the new strategy both visionary and aspirational, rather than prescriptive. “It was like a framework. It wasn’t at such a detailed level that we just handed it over to the candidates,” Goodman recalls. “I think the candidates really appreciated having
STRUCTURED INTERVIEWS

Structured interviews were pioneered in the Israeli military by Daniel Kahneman, who would go on to win a Nobel Prize in economics. Since that work, the futility of unstructured interviews has been well-documented:

- In the most recent study showing the futility of a “fireside chat” approach to interviews, Google looked at tens of thousands of its unstructured interviews, what the candidate scored on the interviews, and how that person ultimately performed on the job. It found zero correlation.
- What’s more, unstructured interviews lead to unwitting discrimination. During informal interactions, interviewers tend to have more favorable impressions of candidates who they resemble.
- Finally, a structured process that requires the assessors to score each answer helps ensure that search committees listen carefully through the entire interview process, which avoids discriminating against candidates who start interviews awkwardly or slowly because of nerves.

It and knowing that the board was aligned around a clear vision.”

Wallack says that Spencer Stuart helped pull together insights from both the strategic plan and the community outreach into the job description. “We knew the heart and soul of what the job description should include. They were very good at making sure we covered all the details and translated them. They also helped with screens: How many years of experience leading an organization do we need? What kinds of experience are we looking for when it comes to fundraising? And so on.”

Janower, the incoming chair, adds that the presence of a strategic plan reassured candidates that the board was committed to a “post-Barry-Shrage” chapter. “I suspect many of the
candidates, as they considered following a beloved 30-year leader, worried that they’d be expected to be Barry’s clone and continue to lead the community as he had; but our plan demonstrated that we saw a need to embrace new ways of working (despite our considerable success), given the changes in our environment. Several candidates found this energizing,” she says.

As they were finalizing the job description, one innovation in its composition came from Bradley Bloom, a managing director at Berkshire Partners, a private equity firm. Bloom told the group that in the private equity world, which requires a laser focus on value creation over short- and medium-time horizons, chief executives often are held accountable to outcomes set by the investor group. The committee felt it would be useful for the job description to include a section that would list what success would look like for the new president once they had been in the position for a while. Under a section titled “What We Will Accomplish,” the job description listed outcomes such as “CJP will have active and productive partnerships throughout the Jewish community” and “CJP will be a high-functioning organization that attracts, develops, and retains top talent.”

Baker, the committee’s eventual hire, recalls that when he read the job description, he felt a sense of relief. Baker knew that a candidate’s vision for the role does not always align with the board’s vision, “so the document served as a kind of reality check,” he says. “As I read it, I felt like, ‘you know what, they’ve got this pretty right; this is the right vision for the future leadership.’” Baker adds that the job description was an “important data point” during his research into whether the role would be a good fit for him. “Every interaction you have with the board and the search committee is a learning opportunity.”

Screening the Candidates

Because the committee had identified the need for an outsider’s perspective to move CJP into its next phase, the committee decided to cast a wide net when sourcing candidates. The early stage of this work fell to Spencer Stuart. All of the names that Ain and Goodman received via referrals were added to a register that the consultants had already built from their own contacts. It was a diverse list and included a famous Jewish television personality, a former U.S. ambassador, and several executives from the for-profit sector. For many of the names on the list, it wasn’t known if they’d even be interested in the position. “There was a view that we can’t just rely on the people we know,” Diane Carlyle, a senior associate at Spencer Stuart, says. “So we had to do extensive research and be very thorough in our outreach.”

The final list tallied around 500 potential candidates. From that, Spencer Stuart conducted preliminary interviews with 80 candidates, eventually narrowing the
pool to 30 qualified prospects whom it sent to the committee for review. The committee reviewed their resumes and decided to invite six people to Boston for interviews.

On the advice of Spencer Stuart, Ain and Goodman agreed that the interviews should be structured, rather than free-flowing. Ain and Goodman drafted a list of behavioral-event questions designed to probe candidates’ past behavior as a way to ascertain whether they possessed the qualities listed in the job description. They also assigned each question to an appropriate committee member who would ask the question and handle follow-up queries during the interviews. For example, a question about working with younger Jews was given to one of the “next generation” committee members; a question about fundraising was given to one of the major donors on the committee. Each committee member was instructed to fill out a score sheet for each candidate as the interview progressed.

Regarding the mechanics of the interview, Goodman and Ain decided to break from Spencer Stuart’s advice. Instead of having the entire committee present for the entirety of each candidate interview, the pair decided to break the committee into two smaller groups. The six interviews were to take place over two days—three candidates each day. One of the committee’s subgroups would meet with the first candidate at Spencer Stuart’s offices; the other would meet with the second candidate in a board room at a hotel across the street. Halfway through the interview, the groups switched places, walking across the street to finish the interview. Ain felt that keeping the groups smaller would encourage deeper listening and participation. But the process meant that half of the committee wasn’t present for the candidate’s answers to certain questions. These members had to learn of the answers through the recollections of the other group, which is to say by hearsay—an inherently unreliable process and one that is prone to errors.
Still, Ain and Goodman’s insistence on structured interviews (i.e., the same questions asked by the same committee members in the same way to all candidates)—as well as their expert facilitation—paid off. The group felt a clear favorite had emerged: Marc Baker. To drill down further, the committee then sent several case studies and scenarios to Baker, such as asking him for his plan to reform CJP’s community involvement, or how he would react to donors who insist on restricting gifts to certain programs. Baker sent his thoughts via email—offering an opportunity for the committee to gauge his writing skills—before an in-person follow-up conversation with the committee. Unprompted, he also sent the committee a document that included his view on the concept of leadership—a document that Wallack says was particularly well-received.

“He came across as proactive and detail-oriented. The extra screen of the cases and his writing sample proved valuable in confirming to [the committee] that we had the right person for the job,” Wallack says.

Spencer Stuart handled the reference checking. Instead of asking the candidates for a list of references, the consultants used LinkedIn and other tools to build a list of people they wanted to interview, and then they asked the candidate for permission to reach out to them. As the committee narrowed in on Baker, Spencer Stuart encouraged committee members to also conduct reference interviews, particularly if they had personal connections with people who had worked with the finalist in the past. One of the quotes that surfaced during these reference checks would eventually be used by Ain and Goodman in their letter announcing Baker’s appointment: “His heart beats for every Jewish person on the planet.”

**The Inside-Outside Leader**

Studies of for-profit companies have shown that outsiders who join the company three to four years before they become CEO perform as well as insiders with much longer tenures who are promoted to the top job, a crossover category that Harvard Business School’s Joseph Bower calls “the inside-outside leader.” To Bower, inside-outside leaders maintain an outsider’s perspective, which they use to jettison outdated organizational habits, while also remaining sensitive to a company’s culture so their changes aren’t rejected.

As it became clear that he was a leading candidate in the search, Baker felt he was an inside-outside candidate. As a Boston native who had served as head of school at one of the area’s most prestigious faith schools, he knew many members of the search committee and CJP board personally. He also was deeply familiar with CJP—his school was a past grant recipient and Baker had
been the scholar-in-residence as part of CJP’s leadership program since 2012.

During his interview with the search committee, Baker shared his thoughts for CJP’s future. “I asked them, ‘How honest do you want me to be this early in the process?’” Baker recalls. Encouraged to speak freely, he remembers an exciting, productive conversation in which he felt the committee members and he were collaborating and problem-solving together. “What impressed me about the committee wasn’t their resumes,” Baker says. “But their talent and intelligence. We spoke exactly as I want to be able to speak to a board—with honesty.”

Baker clearly stood out as a favorite—but this posed a dilemma to the CJP board. “When we decided to pursue Marc, it was a big decision,” Goodman says. “We had other viable candidates, so putting all of your chips on one spot can be risky.” To help mitigate the risk, Ain and other board members reached out to Baker to assess the seriousness of his interest in the position. “Before we went all in with Marc, we needed to confirm that he was all in with us,” Ain recalls. “Conversations with Marc and the search committee took place to confirm his direction. I may have had most of these conversations with him, but I was not the only one.” Ain adds that the entire board worked in unison to ensure its interest was reciprocated.

When Baker assured Ain and others of the seriousness of his candidacy, the board then faced another challenge: Baker’s close ties with CJP posed complications. As the Jewish community develops its leadership pipeline, organizations will increasingly look to recruit leaders from close partners—as CJP did with Gann Academy. When Baker was offered the job, Wallack approached the board at Gann Academy. The two organizations decided to announce the appointment simultaneously. CJP provided marketing and PR support for Gann, and the two organizations coordinated messaging. Wallack believes that the two organizations handled what could have been a contentious situation with professionalism and generosity, choosing to see Baker’s appointment to such a high-profile role as a win-win for both organizations.

After the Handshake

While the CEO search process officially ends when the deal is inked, the board’s responsibilities for ensuring a successful transition do not. The chief responsibility of any board is management of the senior executive—and ensuring that they successfully transition into their new role is a major undertaking. Nonetheless, CEO onboarding remains a weakness even in the for-profit sector, and the problem is particularly acute in the nonprofit sector. A Bridgespan survey of nonprofit CEOs found that nearly half (46%) got little or no onboarding help from their boards. As one executive told Bridgespan, “The board essentially said,
‘We’re glad you’re here. Here are the keys. We’re tired.’"

CJP was determined to break this mold. After completing negotiations with Baker, Wallack and Janower drafted a transition plan that began immediately and lasted through the six months’ notice that Baker gave Gann Academy and into the first year of his tenure at CJP. “We didn’t wait for his first day to get started,” Wallack explains. “We got to work helping educate Baker about CJP and establishing 30-, 60-, 90-, and 365-day plans.”

Wallack and Janower formed two groups to assist Baker. The first, which they called the transition working group, consisted only of Baker, Wallack, Janower, Shapiro, and David Strong, CJP’s chief financial officer. The group also pulled in outgoing CEO Barry Shrage and others as needed. Through weekly conference calls with Baker, the transition working group addressed tactical questions related to the transition. These included crafting a learning agenda for Baker, prioritizing meetings, and formulating a communications strategy, among other priorities.

Within the learning agenda, the working group oversaw three deep dives: a staff-led conversation about issues such as the organizational map (structure, finances, programming, strategic plan, etc.); the community map (agency partners, national and international institutions, media landscape, etc.); and the stakeholder map (beneficiaries, donors, volunteers, etc.). Each session was scheduled for several hours and included extensive pre-reads for Baker to absorb and interpret.

Simultaneously, Wallack and Janower also created what they called Baker’s transition cabinet, a group of a dozen or so strategic advisers such as former board chairs, search committee members, and other longtime stakeholders. The group’s raison d’etre was to assist Baker with his cultural inculcation. It met with Baker in person several times and discussed topics such as the community landscape and historical context, advice on relationship-building inside and outside of the organization, and personal goal setting for Baker. Cabinet members were available individually for ad hoc advice as well. The interactions were designed so that Baker could continue to benefit from the relationships throughout his tenure. And Shrage, the outgoing executive, also let Baker know that he was welcome—but not obligated—to use him as a sounding board and resource throughout the transition period.

This transition work was in addition to Baker’s “day job” of transitioning out of his leadership position at Gann Academy. Wallack says that he and Janower were in close contact with the board at the school to ensure that no lines were crossed. Transitions can be periods of increased productivity for
incoming executives as they harness their excitement around their new appointment, and Baker’s commitment to hitting the ground running at CJP was palpable to Wallack. “He worked harder,” Wallack explains, when asked how Baker balanced his outgoing and incoming leadership responsibilities.

The CJP board felt that its obligation to ensure a successful CEO transition should be focused not only on the incoming CEO, but also on helping the outgoing CEO as well. Yale School of Management’s Jeffrey Sonnenfeld, who wrote eloquently about CEO departures in his book, “The Hero’s Farewell,” describes the end of an illustrious CEO’s tenure as “a plunge into the abyss of insignificance, a kind of mortality.” Wallack, Janower, and CJP’s board were committed to helping Shrage navigate this tricky transition in his career.

Around the time that the board launched its search for Shrage’s successor, a working group was also formed, dedicated to supporting Shrage in his own transition. The group consisted of several former chairs of the board and a couple of other key volunteers who had overseen Shrage at various points in his tenure, including Wallack. As is typical for productive, long-serving CEOs, Shrage wasn’t seeking retirement upon stepping down, but rather a new chapter in his professional life. Over the course of more than a year, the group helped him formulate what that might mean.

The support started with general conversations about Shrage’s goals and then narrowed as it became clear that Shrage was interested in academia. Members of the group eventually worked directly with Shrage as he negotiated an agreement with Brandeis University to become a member of its faculty.

For Wallack, all of the hard work of the various committees and the board came together in early 2018. Baker’s appointment was met immediately with excitement and enthusiasm throughout the community and beyond, and the transitional period began as hoped and planned. Only a few months after the board announced Baker’s selection, Brandeis issued a press release announcing Shrage’s appointment as a professor of practice at the university’s Hornstein Jewish Professional Leadership Program. “We wanted to be thoughtful about all aspects of the search,” explains Wallack. “A CEO transition is a two-sided coin—a beginning and an ending. We felt a responsibility to make sure both went smoothly.”
EPILOGUE

Few organizations in Jewish life can match the intensity and scale of CJP’s search. But looking back on their tenure as search co-chairs, Goodman and Ain believe that the root cause of the organization’s success was not its intricate and extensive process—rather, it was the external manifestation of CJP’s decision to recruit the best people to undertake the search. As Goodman says, “The right people drive the right process.” By finding two high-profile, engaged search chairs—and empowering them to assemble a committee of all-stars—CJP provides a model for other organizations undergoing their own CEO transition.
Position and Candidate Specification

Combined Jewish Philanthropies of Greater Boston

President and Chief Executive Officer

PREPARED BY:
Jennifer Bol
Mary Gorman
Diane Carlyle

October 2017
Assignment: 64014-001

Confidential: This document has been prepared for the exclusive use of the client named. Because it contains confidential information, its use should be controlled and limited to the executives concerned. This information is given in good faith and is believed to be correct but may require verification.
Combined Jewish Philanthropies (CJP) is at the heart of Greater Boston’s Jewish community, but its reach is felt around the world. Our mission is to inspire and mobilize the diverse Boston Jewish community to engage in building communities of learning and action that strengthen Jewish life and the world around us.

Founded in 1895 as the Federation of Jewish Charities of Boston, the organization has grown tremendously in terms of members, scope of impact, and dollars raised. Today CJP is the third largest Federation in North America out of 160 such organizations. For fiscal year 2017, CJP will invest over $64 million in the community. CJP is recognized as one of the most efficiently operated, fastest growing, and most successful Jewish Federations in the country and was recently ranked as the largest nonprofit in Massachusetts by the Boston Business Journal.

In addition to raising funds for its programmatic agenda and to support community organizations, CJP manages philanthropic capital totaling $1.76 billion, comprised of its own permanent endowment, the assets of 85 Jewish organizations that invest their own endowments with CJP as Partners and Co-Investors, and a Donor Advised Fund program that distributed $110.6 million in grants locally, nationally, and globally last year. The organization has developed a strong planned giving program to help grow CJP’s endowment and secure the community’s future.

In addition to CJP’s staff of nearly 170, one of the organization’s greatest assets is its network of approximately 800 volunteers who devote their time, expertise, and connections to help the organization in its governance, operations, fundraising, strategic planning, public affairs, and more.

COMMUNITY CONTEXT

CJP has become a highly complex and multi-faceted organization, with dozens of strategic programs impacting people in Greater Boston, nationally, and internationally. The next leader of CJP will join the organization at an auspicious time. The CJP community invested in developing a strategic framework in recent months, and the new President and CEO will inherit the in-depth thinking and analysis from this process.

The 2015 Greater Boston Jewish Community Study revealed significant changes in the community over the past 10 years – re-urbanization (where there are relatively few synagogues and traditional Jewish institutions), significant shifts in denominational affiliation, and a diversity in backgrounds (many more Israelis and Russians) – which has impacted the ways of engaging community and in the sources from which people derive meaning. Most significantly, young adults are coming of age in a unique context that shapes their values: almost half are children of interfaith parents, many are skeptical about particularism, and suspicious of conformity and institutionalism. While successful synagogues and other organizations continue to create vibrant communities for many in our community, there is also a growing interest – particularly among Israelis, Russians, LGBTQ, and young adults – in new spiritual and cultural outlets.

Moreover, Israel – once a source of unifying pride for American Jews – has become a polarizing topic for many in the community. The challenge is to foster broad engagement of diverse viewpoints and inspire those, who do not see Israel as relevant to their lives, to understand its profound significance to the Jewish people. In light of
this and other political issues that have the power to divide, CJP’s role in bringing the community together in pursuit of collective goals has never been more important.

Philanthropy is also changing. Donors are increasingly results-focused and data-driven. Seeking to feel the impact of their gifts, they prefer directed giving over donating unrestricted funds to large umbrella organizations. Millennial donors approach philanthropy with a particularly global, social, and inclusive outlook.

Trends like these have shaped CJP’s vision and strategy over the years. These latest insights from the 2015 study underscore the organization’s focus in five areas:

- **Caring:** Ensure that every vulnerable person in our community has access to the services needed to move from crisis to stability
- **Justice:** Work to build a more just and peaceful world
- **Jewish Life and Learning:** Enable our diverse community to experience the richness of Jewish life
- **Israel:** Inform, engage, and empower our community to effectively engage with and support Israel’s future
- **Community:** Invest in the leadership and resource capacity of the community

**FINANCIAL AND OPERATIONAL HIGHLIGHTS**

- **Staff:** ~170
- **Total annual budget:** $64.4 million
- **Endowment:** $1.76 billion, inclusive of Endowment, Donor Advised Funds and other assets as well as philanthropic capital managed for other organizations

For more information about CJP, please visit: [https://www.cjp.org/](https://www.cjp.org/)
The President and Chief Executive Officer (CEO) of CJP represents the Jewish community in the Greater Boston area. With a focus on supporting and serving the Jewish community in a courageous and inclusive manner, the CEO is responsible for providing strategic leadership and bringing the community to the next level of engagement and impact. She/He will be able to attract the best volunteers and professionals – including those of the next generation – to the organization and will drive operational excellence. She/He will act as CJP’s chief spokesperson and as an ambassador and advocate for the region’s Jewish community, clearly articulating its needs and values, and inspiring and engaging all members of this vibrant and diverse community. The CEO will also serve as a leading convener for the Greater Boston Jewish community as well as CJP’s chief fundraiser. Skilled at creating and nurturing relationships, he/she will be genuinely energized by being with other people. It is essential that the CEO demonstrates a keen love of Jewish life and learning.

**KEY RESPONSIBILITIES**

- **Shape CJP’s going-forward strategy to drive engagement and impact:**
  - Informed by the strategic framework and by on-going discussions, communicate a coherent and compelling vision that inspires already active members of the community, attracts the next generation, and creates multiple opportunities for the unengaged to become involved with CJP.
  - Develop a clear and actionable set of priorities for CJP that will address the critical issues for the Jewish community in the Greater Boston area, nationally, in Israel, and other parts of the world.

- **Convene the Jewish Community:**
  - Be an active voice for the Jewish community on the critical and complex issues it faces and harness the resources and support required to effectively drive inclusion and action.
  - Create and maintain a big tent for the Greater Boston Jewish community that includes diverse stakeholders and connects individuals collectively across the community.

- **Build CJP’s Resources:**
  - Provide leadership for all of CJP’s fundraising efforts. Increase discretionary funding by actively engaging existing and new donors in CJP’s key priorities and needs.

- **Develop innovative new approaches to fundraising:**
  - Diversify the donor base, increase campaign participation, and develop the next generation of donors.

- **Build a world-class organization:**
  - Recruit, develop, and retain top talent, build high-functioning teams and robust systems and practices.
  - Nourish an organizational culture that will continue to support growth, innovation, and change.
DESIRED OUTCOMES – WHAT WE WILL ACCOMPLISH

- CJP will drive increased engagement in service and participation across the Jewish community. In particular, CJP will develop and implement successful new models that engage emerging groups – the next generation, Russians, Israelis, LGBTQ, and others – in ways that are meaningful to them.

- The priorities of the community will be well understood and communicated; CJP's impact model will be well-aligned and measurable against those priorities and will have the ability to flex and adapt as the needs of the community change and evolve. CJP will actively measure impact and share results.

- CJP will be an inspiring and trusted convener within the community, with the ability to drive a strong sense of inclusiveness and comity, even in the face of divisive or controversial issues which, without CJP's leadership, could divide the community.

- CJP will have active and productive partnerships throughout the non-Jewish community.

- CJP's fundraising model will be reimagined and reinvented in ways that are responsive to the changes in donor attitudes and CJP community priorities and allow CJP to grow resources for the community.

- CJP will be a high-functioning organization that attracts, develops, and retains top talent with a strong organizational culture characterized by purpose, caring, and innovation, deeply rooted in Jewish values.
Grounded in Jewish values, the President and CEO of CJP will be an inspirational leader and skilled institution-builder with an abiding love for the Jewish people and a deep commitment to nurturing and strengthening the Jewish community. The CEO will be present and highly visible in the Jewish community, investing the time to listen and understand the evolving needs of all of its constituencies. With a keen ear, political savvy, and excellent judgment, she/he will excel at building, maintaining, and leveraging relationships with a myriad set of stakeholders, both Jewish and non-Jewish, in the Greater Boston area, along with key national and international partners. The CEO will establish herself/himself as a trusted partner to the Board, a dedicated leader and mentor to the staff, and an influencer and convener in the community.

**CRITICAL LEADERSHIP CAPABILITIES**

**Strategic Focus**

CJP is one of the most innovative and successful Jewish Federations in North America. During a time in which there is tremendous change both in the Jewish community and in philanthropy, it is essential that the next President and CEO:

- Understand the many ways in which both the Jewish community and philanthropy are evolving, including the implications for current and future programmatic initiatives and funding.
- Articulate a vision and direction for CJP that engages and energizes the entire Jewish community.
- Meet people where they are in their Jewish journey, and provide multiple ways to engage with CJP. Of particular importance, prioritize a deep commitment to engaging and developing the next generation of individuals and leaders within the Jewish community.

**Leading Change**

At a time of change both within CJP and externally, the next CEO must continue to build a culture that is innovative, dynamic, and nimble. The next President and CEO will:

- Create and nurture an environment that encourages bold thinking and risk-taking. Convene thought-leaders and engage a broad range of constituents in imagining the highly effective federation of the future.
- Develop and empower change-leaders across the organization. Identify and involve key influencers, volunteers, and community partners in the design and implementation of change initiatives.
- Build innovative new models for engagement and convening that inspire individuals to participate in CJP’s initiatives and support the Jewish community.

**Organization Building**

A large complex organization with outsized impact and evolving demands, CJP must develop a strong organizational framework to accomplish its ambitious goals. To do this, the next President and CEO will:
APPENDIX - JOB DESCRIPTION

COMBINED JEWISH PHILANTHROPIES OF GREATER BOSTON

- Attract, develop, and motivate a talented staff within the organization and inculcate the environment with a strong sense of teamwork.
- Drive organizational performance across multiple dimensions – processes, practices, and systems – for measurable positive impact both internally (e.g. professional and career development, diversity and inclusion) and externally (e.g. impact, fundraising, thought leadership, and influence).
- Create an organizational structure that is both robust and flexible, permitting the organization to be highly effective, responsive, and fluid.

Collaborating and Influencing

The CEO will be a strong relationship builder who is comfortable in most settings and who has deep experience serving as the external face of an organization. In addition to excelling as a convener, she/he will play a leadership role in supporting and nurturing the broader Jewish community in the Greater Boston area. The next President and CEO will:

- Develop strong, authentic relationships with people. She/He will listen well, connect with people, and care deeply about individuals, families, and the Jewish community as a whole.
- Demonstrate keen and sophisticated influencing and negotiation skills, adapting to the individual, organization, and/or situation.
- Build partnerships with individuals, as well as local and national agencies and organizations, based on a shared commitment to the Jewish community and Jewish values, embracing differences in opinion to advance a common shared set of goals.

OTHER PERSONAL CHARACTERISTICS

- Deeply committed to the Jewish people
- Authenticity and the highest level of integrity
- Intellectual heft and curiosity
- Commitment to diversity and inclusion
- Courage coupled with judgment and stamina
- Demonstrable connection with the next generation
- Energy

IDEAL EXPERIENCE

10+ years of senior leadership experience in a complex, multi-stakeholder organization

Management experience at the organizational level is preferred; management at the department level is required.

Experience serving as the public face of an organization

Outstanding verbal, written, and social media communication skills as well as empathetic listening skills.
APPENDIX - JOB DESCRIPTION

PROVEN TRACK RECORD OF FUNDRAISING
Individuals with no experience in the nonprofit sector must demonstrate comparable experience in their sector, including success at cultivating relationships and asking for, obtaining, and structuring financial and in-kind support, either as a CEO, a volunteer fundraiser, or as an executive leader.

EXPERIENCE WORKING WITH A BOARD
Experience serving as principal advisor, partner, and liaison to a Board.

SUBSTANTIVE KNOWLEDGE OF JEWISH THOUGHT, HISTORY, AND CULTURE
A deep love of the Jewish people and a demonstrated ability to incorporate Jewish learning into communications and leadership style.

PASSION FOR AND KNOWLEDGE OF ISRAEL
A great supporter of Israel.

BACHELOR’S DEGREE
An advanced degree is preferred.

APPLICATIONS OR NOMINATIONS
To apply or nominate an individual for this position, please send an email with resume and cover letter, if applicable, to CJPPresident@SpencerStuart.com.

COMBINED JEWISH PHILANTHROPIES OF GREATER BOSTON
APPENDIX - INTERVIEW FRAMEWORK

CJP PROPOSED INTERVIEW FRAMEWORK

ROUND 1:
- Committee splits into two groups led by Aron and Shira
- Each group will meet with candidates for a 75-minute interview with a 30-minute break to debrief and move
- One group will be at Spencer Stuart and one group will be at CJP (they are next door to each other); candidates stay in one location to avoid running into one another
- Each group will cover different topic areas to ensure that candidates don’t have to cover the same ground twice. Suggested splits:
  - Group 1 – Strategy development and execution, organization development and capacity building, community engagement
  - Group 2 – Change management, developing institutional partnerships, fundraising, Jewish knowledge
- What this looks like – each day for 2 days, depending on the number of candidates invited:

<table>
<thead>
<tr>
<th>Time</th>
<th>Group 1</th>
<th>Group 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30-9:00</td>
<td>Pre-brief</td>
<td>Pre-brief</td>
</tr>
<tr>
<td>9:00-10:15</td>
<td>Candidate A</td>
<td>Candidate B</td>
</tr>
<tr>
<td>10:15-10:45</td>
<td>Debrief and Move</td>
<td>Debrief and Move</td>
</tr>
<tr>
<td>10:45-12:00</td>
<td>Candidate B</td>
<td>Candidate A</td>
</tr>
<tr>
<td>12:00-12:45</td>
<td>Debrief and Lunch</td>
<td>Debrief and Lunch</td>
</tr>
<tr>
<td>12:45-2:00</td>
<td>Candidate C</td>
<td>Candidate D</td>
</tr>
<tr>
<td>2:00-2:30</td>
<td>Debrief and Move</td>
<td>Debrief and Move</td>
</tr>
<tr>
<td>2:30-3:45</td>
<td>Candidate D</td>
<td>Candidate C</td>
</tr>
<tr>
<td>3:45-4:15</td>
<td>Debrief and Reconvene</td>
<td>Debrief and Reconvene</td>
</tr>
<tr>
<td>4:15-5:15</td>
<td>Full Group Debrief</td>
<td>Full Group Debrief</td>
</tr>
</tbody>
</table>

ROUND 2:
- Committee as a whole meets with finalists
- Possible to add small group breakfasts, lunches, or dinners on “the shoulders” of the interviews if desirable
- Prior to the interviews, the Committee will develop two “thought questions” which will be shared with candidates in advance, possibly with a small amount of supporting material
  - Candidates will be instructed to come to the meeting prepared to lead a discussion around both thought questions
- Second round interviews are typically two hours divided as follows:
  - 1 hour for discussion of two thought questions, approximately 30 minutes each
  - 30 minutes for candidate-specific follow-up questions (developed by 2-person teams from the committee assigned to each candidate)
  - 30 minutes for questions from the candidate
- Sample day:

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:30-9:00</td>
<td>Breakfast Candidate A</td>
</tr>
<tr>
<td>9:30-11:30</td>
<td>Interview Candidate A</td>
</tr>
<tr>
<td>12:00-1:30</td>
<td>Lunch Candidate A</td>
</tr>
<tr>
<td>2:00-4:00</td>
<td>Interview Candidate B</td>
</tr>
<tr>
<td>4:00-5:00</td>
<td>Committee Debrief</td>
</tr>
<tr>
<td>6:30-8:00</td>
<td>Dinner with Candidate B</td>
</tr>
</tbody>
</table>

- Round 2 schedule will be determined once we know how many finalists there are and the types of issues the Committee wants to explore with each of them
# APPENDIX - EVALUATION GRIDS

**PRESIDENT & CEO CONFIDENTIAL CANDIDATE EVALUATION GRID**

<table>
<thead>
<tr>
<th><strong>TEAM ARON</strong></th>
<th><strong>Candidate Name:</strong> _______________________________</th>
<th><strong>Strengths</strong></th>
<th><strong>Weaknesses</strong></th>
<th><strong>Rate 1 to 5</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CHANGE MANAGEMENT</strong></td>
<td>*</td>
<td>*</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td><strong>DEVELOPING INSTITUTIONAL PARTNERSHIPS</strong></td>
<td>*</td>
<td>*</td>
<td>*</td>
<td></td>
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<tr>
<td><strong>FUNDRAISING</strong></td>
<td>*</td>
<td>*</td>
<td>*</td>
<td></td>
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<tr>
<td><strong>JEWISH KNOWLEDGE</strong></td>
<td>*</td>
<td>*</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td><strong>OTHER</strong></td>
<td>*</td>
<td>*</td>
<td>*</td>
<td></td>
</tr>
</tbody>
</table>

Please provide qualitative feedback in areas marked by bullet-points, for review when the search committee convenes for its debrief.

RATE EACH ASSESSMENT ON A SCALE OF 1 TO 5: 5 EXTRAORDINARY, 4 ABOVE AVERAGE, 3 AVERAGE, 2 BELOW AVERAGE AND 1 NOT ACCEPTABLE.

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**PRESIDENT & CEO CONFIDENTIAL CANDIDATE EVALUATION GRID**

<table>
<thead>
<tr>
<th><strong>TEAM SHIRA</strong></th>
<th><strong>Candidate Name:</strong> _______________________________</th>
<th><strong>Strengths</strong></th>
<th><strong>Weaknesses</strong></th>
<th><strong>Rate 1 to 5</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STRATEGY DEVELOPMENT AND EXECUTION</strong></td>
<td>*</td>
<td>*</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td><strong>ORGANIZATION DEVELOPMENT AND CAPACITY BUILDING</strong></td>
<td>*</td>
<td>*</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td><strong>COMMUNITY ENGAGEMENT</strong></td>
<td>*</td>
<td>*</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td><strong>OTHER</strong></td>
<td>*</td>
<td>*</td>
<td>*</td>
<td></td>
</tr>
</tbody>
</table>

Please provide qualitative feedback in areas marked by bullet-points, for review when the search committee convenes for its debrief.

RATE EACH ASSESSMENT ON A SCALE OF 1 TO 5: 5 EXTRAORDINARY, 4 ABOVE AVERAGE, 3 AVERAGE, 2 BELOW AVERAGE AND 1 NOT ACCEPTABLE.
The U.S. labor market is the tightest it’s been in more than half a century. The unemployment rate is at its lowest in nearly 50 years. A record number of job seekers are unemployed fewer than five weeks. The number of job openings has surpassed the number of job seekers. So in today’s climate, finding and recruiting talented individuals can be especially daunting.

Factor in geography and recruiting challenges become even more magnified. Not surprisingly, talent has always been clustered in major cities such as New York, Chicago, San Francisco, Los Angeles, Seattle, and Boston. But today, that dominance is even more extreme, as the past few decades have seen a mass relocation of highly skilled, highly educated, and highly paid Americans to a relatively small number of metropolitan regions. When it comes to talent, America’s economic geography is increasingly a winner-take-all proposition.

It is in this context that, in 2016, a Jewish Community Center (JCC) in the Midwest embarked on a search for a new CEO. Although not located in a major metropolitan city, this JCC still served a relatively strong economy. But the location’s tight labor market—as well as its small Jewish community (roughly 18,000 Jews, compared to 290,000 in Chicago, for example)—presented significant challenges in finding a CEO. Adding to the challenge was the fact that this JCC had a very specific need: a turnaround CEO capable of reversing budgetary decline and other shortfalls.

In the end, the JCC board learned that the key to luring the right talent to its city was not to paper over the apparent cracks or try to put a positive spin on the opportunity. Rather, it was to approach candidates with honesty: to be upfront about the opportunities and challenges of living and working in the Midwest, and of managing a beloved but stagnating organization that was in need of new energy and direction. This
honesty of board members was rewarded with an executive whose profile at first blush might seem unlikely for a JCC deep in the middle of the country: an Orthodox Jew from the Northeast. This is their story.

**When It’s Time for the CEO to Go**

In 2015, the board of the JCC recognized it was time to deal with its challenges. Its CEO had been the head of the organization for over 30 years. But after a period of strong growth throughout the bulk of his tenure, the organization’s performance had steadily declined. The organization had run budget deficits for over 10 years. Its main funder, the local Jewish Federation, was becoming impatient with the organization’s mismanagement. Philanthropic fundraising was “almost nonexistent,” one board member recalls, and many of the JCC staff were disgruntled and demoralized.

Allowing a CEO to stay on despite poor performance is a common problem both in the nonprofit and for-profit sectors. Even at corporations, where shareholder oversight should theoretically put continuous scrutiny on CEOs, it is common for leaders to continue in the corner office even after their ability to add value drops off. A study by Booz & Company, for example, found that companies in the lowest decile of stock price performance underperform industry peers by 45 percentage points over a two-year period, and yet the probability that the CEO is forced to resign only increases by 5.7%. The authors commented that “boards are giving underperforming CEOs more latitude than might be expected.”

Forcing out a CEO is a difficult thing for boards to do, especially when directors/trustees have social ties with the CEO (as is common at nonprofits, especially in smaller communities)—but an ability to act decisively is a key indicator of governance quality. Legendary business consultant and author Ram Charan sums it up this way: “I can’t think of a time when a board fired an underperforming CEO prematurely. But I can think of many instances when they waited too long.” Aware that it had probably delayed appropriate action, by spring 2016, the board reached its threshold. It nominated a new board chair who it felt could assess the situation and act decisively. This new chair had experience both as a past chairman of the JCC and as the CEO of a successful, for-profit technology company, which gave him ample experience in hiring and firing.

The board chair didn’t act immediately, though. Instead, he conducted his own due diligence regarding the correct course of action. In September 2016, he met with all nine executive committee members and asked for their support in moving to replace the CEO. To bolster his case, he invited one past president and one lifetime board member, who also felt it was time for the CEO to step down. He never once used the word...
“termination” but instead discussed how the board should ask the CEO, then well into his late 60s, to “go into retirement.” The board chair received the committee’s full support, and the board (a larger group of 25 members) immediately agreed to the executive committee’s recommendation.

“Terminations can be difficult for nonprofit organizations—you don’t own the business and often you are in the same social circles as the CEO,” the board chair recalls. “But if you’re staggering, you have to act decisively.”

The board chair and one of his officers met with the long-serving CEO and discussed the path forward, explaining that the board hoped he would agree it was time to retire. The board chair related that he, too, once had to recognize the end of his own leadership tenure. “When I sold my business, I did it because the creativity wasn’t coming out of my head as well as it had been 10 years earlier. I shared that with him, which I think helped,” he says.

The CEO graciously agreed to the board chair’s suggestion to go into retirement. But here the board chair feels that he made a mistake. He asked the outgoing CEO to stay on for six months while the board undertook a search for his successor. The CEO signed on with good intentions. But it’s not uncommon for motivation to sag during a lame duck session, and the organization’s performance slipped further. The board chair admitted that he should have hired an interim CEO—someone who could have started gathering information needed for the financial turnaround and made decisions around low-hanging fruit to begin the process.

The result of this misstep was that the challenge became even greater for whoever would become the next CEO, and the stakes grew even higher.

**Passing on Insider Candidates**

JCC Association (JCCA) is the continental organization of the JCC movement; it offers consulting services to JCCs to assist with many aspects of the JCC business, including governance issues—particularly CEO transitions. To help with its search, this local JCC’s board enlisted the support of a vice president—and certified governance consultant—at JCCA. This VP was a logical pick: She was an East Coaster by birth who resided in a major city in the Midwest, so she could speak from experience about being a transplant in the Midwest. What’s more, she had previously worked with this JCC and knew many of the personalities and key stakeholders.

At the outset, the JCCA VP felt optimistic about the search. She felt the board was committed to a professional process and had assembled a search committee with a strong mix of ages and experiences. “This was a community that hadn’t done an executive search for over 30 years, so the whole process was new,” the VP recalls. “But it was
also a community that really wanted to do it right. They appointed two up-and-coming leaders to co-chair the search, a member of the local federation, and a board chair that was going to be heavily involved. It’s the kind of community I love to work with because they listen and make smart decisions."

At the same time, she saw significant headwinds to landing the right candidate. Awareness of the JCC among other executives at Jewish nonprofits was low. Although this JCC had a good deal to boast about—the previous CEO had overseen the funding and construction of a modern 150,000-square-foot facility that included a fitness center, two indoor pools, and four indoor tennis courts, as well as a variety of cultural programming—it was largely off the radar. The JCCA VP also feared the location would be a challenge to luring strong candidates. “We sometimes struggle in the Midwest to attract talent; people want to go to the coasts or they want to go south for the weather. Candidates look at the Midwest and they think it’s sort of ‘parve’—neither meat or milk, just uninspiring. I love the Midwest, I think it’s America’s best-kept secret, but searching for candidates here can be more difficult,” she says.

Her mind was focused initially on finding an insider candidate. Research suggests that, all things being equal,
insider promotions outperform externally appointed CEOs. The challenge of recruiting to the Midwest made an internal promotion even more appealing, and the JCCA VP soon discovered two credible insiders.

She would eventually put the two insiders into a finalist pool of four candidates. The JCCA VP suggested that the four finalists be interviewed by video conferencing first. Following best practices for “structured” interviews, she asked that the insider candidates also use video instead of appearing in person despite being local; when it comes to interviews, ensuring a consistent experience is key to assessing candidates compared to one another.

During the interviews, it became clear to the search committee that the insider candidates were not the right fit. The committee had a strong vision of the profile it was seeking, which trumped any benefits that came from experience within the organization. It wanted a turnaround CEO—someone who had experience reversing a cycle of decline, shoring up finances, and charting a new direction at a struggling organization. This was a narrow profile. Through good fortune and its own actions, however, the search committee would eventually recruit a candidate with exactly the skills and experience it was looking for.

A Particular Profile

In early 2017, when Debra Cohen1 received a call from the JCCA VP about the opening at the JCC, she was in her sixth year as CEO of the JCC in a small but centrally located community in the Northeast. The timing was fortuitous. Cohen’s youngest child had recently

1“Debra Cohen” is a fictional name. All identifying attributes of the protagonists in this case study have been altered to ensure confidentiality.
WHAT THE RESEARCH SAYS: PERSONAL EXPERIENCE AND CEO PERFORMANCE

Researchers have made various efforts to find relations between the personal or professional attributes of the CEO and outcomes. For example, Benmelech and Frydman (2015) found that CEOs with a military background are less likely to engage in fraudulent activity. Bernile, Bhagwat, and Rau (2014) found that CEOs who witnessed minor natural disasters in their youth are “desensitized to risk” and lead organizations that adopt more aggressive corporate policies, whereas CEOs who witnessed major natural disasters that led to large loss of human life subsequently manage corporations more conservatively. Davidson, Dey, and Smith (2013) found that CEOs who spend lavishly on their own personal lives oversee corporations with loose internal controls. The authors concluded that “measures of executives’ ‘off-the-job’ behavior capture meaningful differences in managerial style.”

left for university, freeing up Cohen to move without uprooting her family. She had entered a period in her career during which many executives feel eager to take on a new challenge—a fact that many potential employers often overlook. Careers often follow a predictable trajectory: Executives start out mobile and open to chasing opportunities that will further their career; they favor stability in middle age (as they build their experience and demonstrate their ability to create value); and then later in life, they look for new challenges in which to apply their wisdom and experience (a period that often coincides with an “empty nest” in the executive’s personal life). “My husband and I were mobile because our two young adults were no longer at home,” Cohen explains. “I was looking for a new and bigger challenge. So it just happened to come to me at the right time.”

When organizations undertake CEO searches during periods of adversity, they may be tempted to try to hide the severity of the crisis and paint a rosy picture. This approach runs the risk of hiring the wrong fit for the role and having to undertake the cost of another search. The emerging consensus among
experts is that transparency in the hiring process paradoxically can help attract talent more effectively. In his book “Principles: Life and Work,” Ray Dalio, founder of the Bridgewater Associates hedge fund, articulates this view succinctly: Show candidates your warts.

Nothing was hidden from Cohen about the need for serious change at the JCC. “Here in the Midwest, we don’t hide anything,” the JCC board chair told Cohen in one of their first conversations. The JCCA VP was also forthcoming; she presented Cohen with benchmarking figures for similar-sized JCCs that showed the JCC in last position in terms of budget deficit, near the bottom for staff morale, and lower for fundraising and board development. The bad news was music to Cohen’s ears. “I actually find it more exciting to go to an organization that really wants help and wants to be turned around and wants change,” she explains.

Cohen identifies herself as a CEO who prefers JCCs that need turning around. At her previous job, she had taken over organizations in difficult financial condition with low staff morale. “So this role posed a question I wanted to answer: Can I take the things that I’ve done previously and at a place that is a little larger with bigger problems? That was attractive to me.”

The fact that Cohen had experience turning around a troubled JCC was very attractive to the board and search committee, as this was a capability they were hoping to find in a CEO. “I think what partially attracted her to our community was the challenge,” the board chair says. “Let’s say we had a CEO that had done a great job and everything was in good shape, I don’t know if she’d want this job. I think she would have been bored. It was just the right fit for both sides.”

The board chair and committee members were thrilled. To be sure, they understood that turnaround CEOs usually prefer shorter, bounded appointments where they can make an impact and then move on. They often don’t feel challenged when their organization is in maintenance mode. But the board was willing to take the risk that Cohen would see her new JCC appointment as a tour of duty. Perhaps Cohen might work out over the long term. Perhaps she would move on after a few years. However, it had bigger problems to worry about than Cohen’s longevity.

**The On-Site Visit**

Cohen seemed to be the right candidate at the right time. But the JCCA VP and the board still had doubts about whether a lifetime East Coaster would be willing to relocate to the Midwest. During some of her first meetings with the search committee, the JCCA VP had run an informal SWOT analysis of the job, asking committee members to answer the question, “Why would someone want to move to our city for this job?” The committee felt it had a good pitch for why the city could be an
attractive place to relocate (affordable cost of living, excellent schools and universities, pro sports teams, good restaurants, and so on), but it had not anticipated a seemingly important complication: Cohen is an Orthodox Jew. While the city has two Orthodox synagogues, it has only one kosher restaurant—the cafeteria at the JCC. This raised more than just a concern about whether Cohen could enjoy the local restaurant scene with her husband; the board worried about how she would entertain potential donors.

When the JCCA VP reached out to Cohen about relocating, the JCCA VP was surprised by how much information Cohen already knew about both the JCC and the city where it is located—a phenomenon that many employers experience today, as candidates access information about institutions and locations online. Cohen knew which Orthodox synagogue she was likely to join, and she had already scoped out potential properties in the Eruv—an urban area enclosed by a wire boundary that symbolically extends the private domain of Jewish households into public areas, permitting activities that are normally forbidden in public on the Sabbath. She seemed very comfortable with the move. Because one of her children has food intolerances, Cohen had become accustomed to avoiding restaurants and eating at home. When it came to entertaining donors, Cohen said she could entertain at her home or at the JCC cafeteria.

“Some board members still had concerns about whether Cohen could be happy,” the JCCA VP recalls. “I told them, ‘It’s not up to you to decide. She’s a senior professional; if she says it’s not an issue, we have to take her word for it.’"

The JCC arranged an on-site tour of the city to coincide with Cohen’s final, in-person interview. While some organizations plan such visits on the fly, JCCA recommended that the board arrange to set Cohen and her husband up with a realtor to show housing options and arrange meetings with leaders at the Orthodox synagogue, as well as with

Show candidates your warts.

RAY DALIO, AUTHOR, "PRINCIPLES: LIFE AND WORK"
board members, staff, donors, and other community stakeholders.

But the board members didn’t push too hard. Rather, they let Cohen come to her own conclusions. “I had done a lot of research, but there were still surprises,” Cohen says. “For instance, it’s a big city, but I can be downtown in 15 minutes, and if I drive to a sports game, I always find cheap, convenient parking. That surprised me. In the last place I lived, I couldn’t even go shopping at Marshalls or T.J. Maxx because of parking.” Cohen’s husband, who had fond memories of his time doing graduate work in the Midwest, was excited about the prospect of the move. “My husband’s feeling was that Midwest people have really nice values. And then on our visit we took a beautiful tour of downtown. We just thought, ‘Wow, this place is great.’”

While Cohen enjoyed the site visit, she still had doubts about the role. In a previous career move, Cohen ended up kicking herself because she didn’t do more due diligence about whether the board was serious about using her as a turnaround CEO or just paying lip service to its desire for change. On the trip, Cohen made discreet inquiries to prominent members of the community; she pressed the JCCA VP on her experiences working with the board; and during her interview with the board, she made sure to make clear that she was only interested in a true partnership. “There were times during the interview when the board would say, ‘What are you going to do?’ and I would actually interrupt and correct them and say, ‘No, it’s what are we going to do together,’” Cohen recalls. “I was very prescriptive that together we can achieve almost anything, but if you’re just looking for me to be the person to turn your organization around by myself, I’m not interested in that kind of a job.”

Cohen soon came to feel that she had strong partners in both the board and, in particular, the board chair, who had a bias for action and wasn’t shy about making tough decisions. Leadership scholars have long debated whether hierarchical or flat leadership structures are more effective—and thus whether it’s better for a leader to be domineering or focus on consensus. But emerging research from Lindred Greer at the Stanford Graduate School of Business suggests that the answer depends on context. During times when execution is paramount (for instance, during a turnaround), a hierarchical power structure in which leaders are empowered to make tough decisions is optimal. During periods of stability when innovation and creativity is needed, egalitarian structures are more effective. Cohen felt she had the backup needed—in the board chair and the rest of the board—to take action at the struggling JCC. She accepted the job.

The Move to the Midwest

In June 2017, Cohen and her husband
stepped off the plane in the Midwest to move into their new home. (The JCC covered their relocation expenses.) The board chair had a plan in place for Cohen’s onboarding that involved meeting with key staff, board members, and past presidents. But when the board chair moved to set up the interviews, he discovered that Cohen had already set up meetings with important stakeholders. It was clear that Cohen was ready to get to work. “It’s like watching a barracuda in the water,” he says approvingly of Cohen’s leadership. “She doesn’t stop.”

In the early days after her arrival, Cohen remembers one gesture that she felt was particularly meaningful for her onboarding. The board organized a welcome barbecue for Cohen, attended by all JCC staff—and the board members did the cooking themselves. Cohen remembered a document that the board had sent her about the community, highlighting its hospitality. “It’s really in the DNA of the people here to be welcoming. That barbecue just confirmed what I had read about and heard in my conversations with people. It was a very meaningful gesture.”

Cohen has felt supported by the board and the community in more important ways, too. Early in her tenure, when it became clear that she needed to terminate the employment of a well-liked but underperforming member of staff, she received the board’s full support. She has been direct and honest about the over-optimism baked into the yearly budget, and she has been given permission to be more aggressive about reducing spending and attempting to end a 10-year streak of deficits. She and the board chair meet once a week and support each other to reach shared goals.

Cohen and her husband’s adjustment to their new setting has been smooth. Recently, Cohen’s mother-in-law passed away, and representatives from her local synagogue sat shiva with her family. She and her husband feel like they have space to breathe in their new life. “When you live in the Northeast, you get used to paying $30,000 for a kid to go to day school, you get used to outrageous home prices. You don’t realize the stress you’re under until you are living somewhere else,” she says.

Her biggest complaint so far? She’s finding it difficult to recruit talented employees. “Unemployment here is super low, so recruiting is a real challenge,” she says. “And getting quality Jewish staff to come to the Midwest is challenging because they perceive it’s not a major center of Jewish life.” Fortunately for Cohen, when it comes to convincing talented candidates to come to the Midwest, she can rely on personal experience to make the sale.
Executive Candidate’s Essay Questions

Please answer questions one and two and either question three or four, in essay form, by typing the question at the top of a blank sheet, and creating a response that does not exceed one side of one sheet each.

Please upload your three essay pages to your Executive Profile on jccworks.com.

1. All candidates: Identify three strategic challenges your current agency/company will face in the next five years, and indicate what you are doing to help meet these challenges.

2. All candidates: What do you see as your role, both professionally and personally, in helping a JCC fulfill its Jewish mission and build Jewish community? How have you done this?

3. For those who currently are employed in a nonprofit organization, including a JCC: What have you done in the past five years to assist your volunteer leadership in reaching their potential as effective decision-makers?

4. For those currently employed in the for-profit sector: This position seems to take you along a different career path than your background suggests:
   a. What are the different qualities and skills that are necessary to lead a Jewish Federation as compared to running a for-profit business?
   b. What do you offer to the JCC field?
   c. What do you need to learn to be successful?
CASE STUDY 05

SPERTUS INSTITUTE FOR JEWISH LEARNING AND LEADERSHIP
Dean Bell was 26 years old when he joined the Spertus Institute for Jewish Learning and Leadership in Chicago as an assistant registrar in 1994. His job primarily involved hammering out transcripts on a mechanical typewriter in a poorly heated hallway. Bell is now Spertus’ president and CEO. If one of the indications of a high-performing organization is its ability to identify, develop, and promote talent from within, then Spertus certainly did something right with Bell. Apart from a two-year stint at DePaul University early in his career, Bell has spent his entire professional life at Spertus, gradually building his skills as an academic, an administrator, and most recently, a leader. In 1995, he became director of distance education; in 1998, associate dean; in 2001, dean and chief academic officer; in 2015, vice president and provost; and then finally, president and CEO in July 2018.

Bell’s journey to the top is particularly extraordinary because it wasn’t born out of ambition, or some grand plan to climb the organizational ladder. In 1994, he was a talented Ph.D. candidate wishing to make his way in the world. He didn’t go knocking down doors at Spertus—he stepped through open ones. “What I really wanted when I first joined Spertus was to be an academic,” Bell says, explaining how Spertus gave him the space and support to grow and change over time. “Until recently I never would have imagined myself as a CEO.”

In a 2007 article in Harvard Business Review, Joseph Bower, a professor at Harvard Business School, argued that a critical difference between organizations that manage CEO successions well and those that don’t is an understanding that succession is a process, not an event. The process actually begins years before the event. Bell can point to many organizational policies that helped his ascent over the years. Spertus’ belief that administrators should carve out time to sustain their teaching and research helped keep his job fresh.
and spurred his creativity. Indeed, long before Google made famous a policy of encouraging employees to dedicate 20% of their free time to side projects, Spertus gave Bell Friday afternoons off to focus on his own interests (Bell has written or edited 10 books throughout his tenure at the organization). He was steadily promoted and stretched—but never to a point of frustration or burnout. “One of the things I love about Spertus is that it is a culture of learning,” Bell says. “I feel like I haven’t stopped growing. If I did, I probably wouldn’t still be here.”

Bell’s long tenure and steady ascent at Spertus are outliers in an era of job-hopping and high employee turnover. But they are not responsible for turning him into a CEO. Indeed, identifying talented employees and promoting them through the ranks of management are, relatively speaking, the easy part of the CEO succession process. The final step of an executive’s ascension to the corner office is always the steepest. The CEO role is unique. When management guru Peter Drucker was asked what is the role of the chief executive, he replied, “The CEO is the link between the inside that is ‘the organization,’ and the outside of society, economy, technology, markets, and customers.” To Drucker, no other role performs that function; everybody else in the organization is more narrowly focused. What’s more, the CEO is the only one held accountable for the performance and results of the entire organization. Because the CEO’s job is distinct, it is difficult to prepare for.

So how did Bell make the leap? For that, he has Hal Lewis, his predecessor, to thank. Uniquely prepared to engineer a successful transfer of power to Bell, Lewis has spent the bulk of his career thinking about how leadership differs from management, and what CEOs can do to prepare successors. He is the author of two books on Jewish leadership, “From Sanctuary to Boardroom: A Jewish Approach to Leadership” and “Models and Meanings in the History of Jewish Leadership;” he teaches a course at Spertus on leadership; and after stepping down as president and CEO of Spertus, he formed a leadership consultancy.

“I’ve been devoted to the issue of CEO succession planning for a very long time,” Lewis explains. “It just seemed like it would be the height of irony if I were to ignore all my learning and teaching in my own transition.”

In June 2015, when Lewis had been in the CEO role for seven years, the executive committee approached him about a routine, three-year contract extension. Lewis had one caveat. He wanted the extension to be his last; he wanted to focus his final term on the identification and grooming of potential successors within Spertus; and he wanted to institute a pay freeze on his compensation so that he could free up resources to develop candidates to replace him.
WHAT THE RESEARCH SAYS: INTERNAL CEOs

Research generally shows that internal CEOs perform better than outsider CEOs in a corporate context.

For example, a 2010 study by Booz & Co. found that internal CEOs delivered superior market-adjusted shareholder returns in seven out of the preceding 10 years. The authors also found that internal CEOs remain in the CEO position longer and are less likely to leave due to forced termination.

However, this research is subject to important limitations. Companies that recruit external CEOs tend to be in worse financial condition. For this reason, writes Stanford’s David Larcker, “it is difficult to conclude whether internal or external candidates are systematically better operators.”

Lewis was focused on finding an internal candidate because he had been influenced by research from the for-profit world that shows—all things being equal—insider candidates outperform external CEOs. Indeed, Lewis had come to believe that nonprofit organizations—and Jewish nonprofits, in particular—do a poor job of developing insiders. “The hiring of outsiders is often simply the result of a failure to prepare insiders,” he says.

So Lewis and Spertus’ executive committee made a deal. Over a three-year period, Lewis would take Bell under his wing; identify areas where Bell needed to develop; and give him opportunities to “practice leadership” by ceding control of key meetings, stakeholder relationships, and decisions. “I told the executive committee that in three years I would step down, and by that time, I would present to the board a camera-ready successor,” Lewis says. It would then be up to the successor and the board as to whether they wanted to make a deal happen—or whether the board should pursue an external search. “My goal was to train someone I thought was capable of being a new leader,” Lewis says, explaining that he felt committed to making sure his leadership succession was done very much by the book.

Recognizing the Time to Go

Lewis and Bell had an unusual professional relationship at Spertus.
Bell hired Lewis in 2001 to work under him as dean of continuing education. But when Spertus found itself in a succession crisis in 2008, Lewis was offered the CEO position, not Bell. At the time, Lewis had experience as a chief executive (he had been CEO of the Columbus Jewish Federation from 1999-2002). Bell did not, and at the time he had no ambitions for the top role. What could have been an awkward leapfrog on the management ladder felt natural to the two men. While the pair are not friends outside of work, they both speak of a relationship of respect and collegiality. “We’ve never had a supervisor-supervisee relationship,” Bell explains. “We always communicate in a spirit of exchange and nurturing on both sides, so it’s been easy to flip-flop in our careers. When we had a conversation before [Lewis] accepted [the CEO role in 2008], I remember saying ‘I think it’s great they offered you the position and I think you’d be great at it.’”

This was no faint praise by Bell; Lewis was about to walk into an organizational maelstrom. In 2007, under the leadership of then CEO Howard Sulkin, Spertus had moved its headquarters to a new building on Michigan Avenue in downtown Chicago designed for Spertus by the prestigious architecture firm Krueck + Sexton. At this exact moment, the credit crunch hit.

“We moved into the building just as the economy crashes,” recalls Donna Barrows, Spertus’ board chair at the time. “We had not finished raising the money for it. That created a dramatic problem. Sulkin had done remarkable work raising as much money as he had, but at that point it was almost an impossible situation. Funding everywhere dried up. We were really in a pickle.”

At the same time, the organization stumbled into a PR crisis that threatened its relationship with its donors. Along with its graduate school and college, Spertus runs a museum and a library. In 2008, the museum held an exhibit of antique maps. Some of the maps were of the Holy Land, and a label for one used the Arabic word for the founding of Israel, which, translated into English, roughly means “catastrophe.” The exhibit caused a rift between Spertus and many in the Jewish community. After multiple conversations with the Jewish United Fund of Metropolitan Chicago (the Jewish Federation of Chicago), which is Spertus’ largest funder, Spertus closed the exhibit early. Sulkin had approved the exhibit, and found much of the ire aimed at him; he stood down to take on a role as chancellor.

“I think at that moment, the board felt—and the CEO felt—it was time for a transition. We needed to have a clean slate,” Barrows recalls. As Sulkin stepped down, the Chicago business press started speculating about Spertus being forced into bankruptcy, and several of Spertus’ volunteer board members resigned, unwilling to put in the time and effort required to oversee
a turnaround. When Lewis was offered the job, Barrows recalls, the mood was grim. “The board had the attitude of ‘you do what you can, we’ll do what we can, and we’re going to work together. The organization is worth saving.’”

Lewis embraced the role of turnaround CEO, giving an interview with the Chicago Tribune in which he borrowed from Rahm Emanuel, then the White House chief of staff, pledging “not to let a good crisis go to waste” (“Can this man rescue Spertus?” read the headline of the interview).

Over a seven-year period, removing what Lewis describes as the “existential threat” that hung over the organization became his focus. With assistance from the board and the Jewish Federation of Metropolitan Chicago, Lewis renegotiated loans with lenders and refinanced the building. In consultations with senior colleagues, he stripped out costs from the organization, reducing benefits and cutting staff positions; the organization would eventually lay off more than half of its work force. At the same time, he expanded Spertus’ pioneering work in adult learning and in the training and development of communal leaders, both volunteer and professional. Lewis felt like he was locked in a battle for survival and, even as Spertus’ finances began recovering, he developed a paranoia captured by a saying that he would repeat often as president and CEO: “We need to make sure the light at the end of the tunnel is not going to be an oncoming train.”

Bell watched Lewis’ tenure unfold from his perch as chief academic officer. Despite seeing so many colleagues laid off, Bell says his loyalty to Spertus only grew during this period. “I was impressed by how Lewis and the board handled it,” Bell explains. “They were open with staff. They explained why the cuts were necessary. There were no backroom machinations. That really instilled trust and good will.”

By 2015, Lewis began to feel confident that Spertus had turned a corner—a realization that turned his thoughts to whether he would be best-placed to lead Spertus in the next phase of its recovery. “I began to realize that the skillsets and energies that were important to effectuate a turnaround were not going to move the institution forward. You can’t survive always working at a fever pitch, trying to battle a crisis. So as it became clear that the crisis was going to end, and that Spertus was going to survive, I realized that the skills I was able to bring to the table were no longer going to be the skills that we needed going forward.”

Lewis’ tenure had been focused on financial stability; now he felt the organization needed to transition from “a crisis mentality to a growth mindset.” Committed to avoiding Louis XIV’s famous conception of power, “L’etat, c’est moi,” Lewis decided that he had to focus on what was in Spertus’ interest, even if it meant stepping aside from a leadership position that he loved. “The
first thing it should say in the CEO’s owner manual is ‘it’s not about you,’” Lewis says, referring to the tendency of charismatic CEOs to overstay their usefulness. “You can’t be a hanger-on. You have to be clear-eyed about when it’s time for you to move on. And then you have to be decisive.”

Barrows remembers Lewis’ arguments about the need for his own obsolescence to be persuasive. “He came to us and said, ‘You shouldn’t have the same CEO forever. I came here to do a job and I can see the finish line.’ We respected his candor.” Barrows recalls the board members pausing, as they were happy with Lewis’ performance, “but in the end, nobody for a minute thought that they were going to talk him out of it.”

When Lewis scanned the top management ranks for a successor, Dean Bell stood out as the only one with the unique combination of academic training, administrative skills, and institutional context. Some leadership experts believe it is best practice to involve the board in the identification of possible insider successors—but,

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**POWER CORRUPTS**

Dacher Keltner, a psychology professor at Berkeley, has documented in lab settings numerous ways in which power leads to anti-social behavior.

In one of Keltner’s more innovative experiments, known as “the cookie monster” study, Keltner brought people into a lab in groups of three, randomly assigned one to a position of leadership, and then gave them a group writing task. A half hour into their work, Keltner placed a plate of freshly baked cookies—one for each team member, plus an extra—in front of everyone. In all groups each person took one and, out of politeness, left the extra cookie. Who would take a second treat? It was nearly always the person who’d been named the leader. In addition, the leaders were more likely to eat with their mouths open, lips smacking, and crumbs falling onto their clothes. Keltner says power’s corrupting influence is unconscious, but leaders can avoid it by actively practicing leadership styles that encourage humility and respect, such as the concept articulated by Robert Greenleaf of “Servant Leadership.”
in practice, most boards do not have access to or knowledge of management ranks below the C-suite. In Spertus’ case, Lewis says he would have taken more than one candidate under his wing if the opportunity had been there. “We are too small an organization to have multiple logical candidates,” Lewis explains. “No one else had the breadth of institutional knowledge and administrative skillsets, and who also was qualified as an academic.”

Lewis had a few discreet conversations with the executive committee about his hopes for Bell, but he didn’t immediately identify Bell as his preferred insider candidate to all of Spertus’ trustees. The delay was strategic. “I had no interest in becoming a lame duck,” Lewis explains. “I was the one that still had critical relationships with the banks and the lawyers and the philanthropists, so we didn’t want to risk those.” What’s more, Bell and Lewis had preparatory work to do together first to make sure Bell was “camera ready” to be presented to the board as a potential successor.

The Education of a Leader

In a 2007 article in Harvard Business Review, Joseph Bower, a professor at Harvard Business School, shared research that showed outsiders who join the company three to four years before they become CEOs seem to do just as well as insiders with much longer tenures—a crossover category that he termed the “the inside-outside” leader. “My research suggests that as a rule the best leaders are...people from inside the company who have somehow maintained enough detachment from the local traditions, ideology, and shibboleths to maintain the objectivity of an outsider,” Bower wrote.

When Bell looks back at his career at Spertus, he believes it was the two years he spent outside of the institution (as a senior advisor and associate director of a graduate program at DePaul University) that set him on a course to become CEO. First, he continued his research and teaching and gained new administrative experience in a larger higher education setting, so when he returned to Spertus, he was viewed as a more substantial professional. When he left Spertus, he was the director of distance learning; when he returned, it was to head up all of Jewish studies and teach courses as an associate professor.

More importantly, the time away changed Bell’s perspective and mindset: “DePaul is a totally different institution,” Bell explains. “They have 25,000 students. Spertus has a few hundred graduate students and several thousand adult learners who participate in public programs and arts and culture offerings. The experience made me aware of other approaches and ideas. You learn a lot by being in a different type of place.”

Even though he spent many years of his career at Spertus, Bell worked to maintain “fresh eyes” by serving on a regional accrediting body, which took him on various appraisal trips to other
higher-learning organizations. “You get different ideas for improvement but also appreciation for what you do well,” Bell explains.

His experience as a reviewer gave Bell deep knowledge of administrative best practices in higher education. Still, Bell was unsure how to react when Lewis first shared his plan of grooming him to be his successor. In his heart, he felt that he might always be an academic first, and an administrator second. And he worried that he lacked many of the skills he would need to take over from Lewis.

Lewis reassured him. “He was very thoughtful in terms of how he framed it,” Bell recalls. “He understood that there were areas where I would need to develop to feel ready, and he explained that he had a plan to help me.”

Bell understood that he was not a shoe-in for the role, but that an endorsement from Lewis would make him a strong candidate. What’s more, the development work he would undertake with Lewis would be useful to his professional life no matter the outcome. With Bell committed to the plan, Lewis promoted Bell from chief academic officer to vice president and provost, which allowed him to increase his portfolio of responsibilities (as well as his compensation). The pair then performed a joint appraisal of areas where Bell needed training and development. “I offered my observations, and he added a few of his own, and we went to work on them,” Lewis recalls. Bell and Lewis set up a standing “coaching” meeting each week for three hours, with additional “huddles” in between; they would go through Bell’s development areas methodically.

First, the pair decided, Bell needed to become more familiar with financials; while he had a reputation for being a responsible steward of departmental budgets, he did not have any experience taking care of global financials. “It never occurred to me to think about things like facilities, rentals, and catering, for example, or investment incomes or the financing of endowments and restricted gifts,” Bell explains. “I had administrative experience, but all of a sudden, I had to think with a broader, institutional perspective. Lewis put Bell in charge of Spertus’ finance committee, and spent time with him explaining both the organization’s annual budget and its more complicated funding arrangements.

The pair also agreed that Bell needed experience interacting with donors. “Bell is a very compelling person,” Lewis says. “But we are talking about high-end, sophisticated, major-gifts fundraising, the kind you associate with universities. If you’ve never asked somebody for a million dollars, you have to practice that.” Lewis invited Bell to join in meetings with major funders—including Spertus’ largest, the Jewish United Fund of Metropolitan Chicago (the Jewish Federation of Chicago)—and asked Bell to lead many of the conversations. As provost, Bell’s presence wasn’t out of the ordinary, and Lewis did not tell the
donors that Bell was participating as part of his grooming process.

Lewis also wanted to make sure that Bell increased his exposure to the board. At the time, Spertus was redoing its bylaws. Lewis asked Bell to be the lead professional on the effort, something the CEO would normally have done. “Believe me, I was fully informed and operating in the wings,” Lewis explains. “It was important for the board not just to see him in conjunction with his academic work, but with the business side and the fundraising and administrative and programming sides of the organization.”

Bell’s public speaking also came under scrutiny; his approach to presenting to the board was a particular area for development. Lewis and Bell agreed that Bell’s style was too academic for the issues that rise to the level of governance. “We would go through presentations to boards—literally all of it, from the construction of the slides to the presentation style,” Bell recalls. “I learned not to bury the lead, to be more direct, to tell stories as well as report numbers.”

While the pair discussed in abstract how Bell could improve on the targeted areas, Lewis also devolved many of his own responsibilities so Bell could put learning into action. In Lewis’ course on leadership, he explains to students the importance of finding the chance to practice leadership. “If you are number two and you’re never given the chance to practice leadership that a CEO would use, then you’re just going to be a well-rehearsed number two,” Lewis explains. “So we created opportunities for Dean to practice the leadership that is typically associated with a chief executive of a nonprofit organization. And that became part of the transition. Slow at first, we increased the intensity and the frequency, and so by the end, there wasn’t anything about the organization that I knew that Dean didn’t know.”

Lewis learned an important lesson during this period of delegation. While a more controlling CEO might have felt threatened by Bell’s increased involvement with the donors, the board, and other important stakeholders, Lewis came to realize that “one’s leadership does not diminish when you put
someone else in the limelight,” he says. “In my teaching I liken the dynamic to lighting a candle with another candle. My leadership doesn’t diminish when I provide opportunity for others. Nobody thought, ‘oh Hal isn’t working hard because Dean is presenting this report.’ We were spreading leadership out.”

Even as the pair worked together on Bell’s developmental areas, Lewis made sure Bell understood that no leader has a complete skillset—and that, as a result, they must surround themselves with capable senior leaders who complement their skillsets. One of Lewis’ favorite articles in Harvard Business Review is titled “In Praise of the Incomplete Leader,” in which the authors argue that no single leader can do it all and so must surround him or herself with the right group of colleagues and advisors. “This is nuanced, of course,” Lewis says. “Leaders will not succeed if they insist upon resting on their laurels. I cannot say, ‘this is what I’m good at, so I have no need to get better at other things.’ But the leader who leads with an eye towards collaboration and power sharing will go further than the one who insists, ‘I alone can do it all.’”

A year into Hal Lewis’ final contract at Spertus, Peter Bensinger, Jr., a partner at a law firm in Chicago, took over as board chair. Bensinger had not served on the executive committee, so he did not know about Lewis’ plan to groom Bell. He responded favorably when informed. Bensinger had been a student of both Lewis and Bell’s as part of Spertus’ continuing education program, and knew both men well. He did not assume that Bell would be chosen as CEO—indeed he was agnostic about whether he would end up being the best choice—but he understood the value in trying to groom Bell and in helping him prepare as a potential successor. Leadership experts point out that, even if they never ascend

In my teaching I liken the dynamic to lighting a candle with another candle. My leadership doesn’t diminish when I provide opportunity for others.

HAL LEWIS
to the top role, a strong number two allows a board chair to sleep better at night knowing that, if the CEO decided to leave abruptly, became incapacitated, or was forced to resign, an acting head could be appointed immediately. Bensinger became a trusted adviser and advocate for Lewis’ professional development plan for Bell.

At the first executive committee meeting under Bensinger in August 2016, Lewis and the immediate past chairman, Mark Mehlman, revisited the prior discussions around the need for CEO succession planning, as Lewis had previously indicated his intention to step down at the end of his contract in June 2018. The following executive committee meeting was devoted to succession planning. At that meeting, Lewis presented a proposal and recommendation for a succession plan, including the pros and cons of a national search. He explained the intricacies of engaging with an external search firm and various other methods for sourcing candidates. He presented academic research from the for-profit world that suggests insider CEOs tend to outperform outsider appointments. He laid out the cost and time involved in a national search.

Given his background, all indications seemed to point to Bell as the best internal option for the committee, but Lewis insists he was not advocating either way. He had his preferred insider candidate, but he was clear with the committee that picking the CEO was the responsibility of lay leadership. “In Bell, I could present a qualified internal candidate,” Lewis explains. “That was my job as CEO. What they did from there was the board’s job. Hiring a CEO is the board’s most important job. I made sure to always respect the principles of good governance.”

After deliberation, the executive committee decided to proceed to interview Bell and reserve judgment on whether to recommend to the Spertus board that it conduct an open search for a successor. The group identified desired criteria for the next CEO and specific questions to ask Bell. At his interview with the executive committee, Bell presented his vision for Spertus and also answered questions. He then asked for a follow-up session at which he would ask questions and engage the committee in a robust discussion. This follow-up session occurred a few weeks later. After the two meetings, the executive committee was unanimous that Spertus should forego a national search and that it should proceed to recommend to the board that Spertus hire Bell to become Spertus president effective July 1, 2018. This is in fact what happened at the April 2017 board meeting.

Barrows says that, by 2017, the executive committee members were predisposed to Bell; Bensinger agrees: “It was his job to lose,” he remembers. The challenges and costs of an external search influenced their thinking—but that was only a small part of the picture. More importantly,
the increased exposure to Bell that had been orchestrated by Lewis allowed the executive committee and members of the board “to get to know Dean in a new light,” Barrows recalls. “It meant we had a very significant body of information about him that was more than just a resume. And we liked what we had seen.”

Over the previous two years, Bell had led conversations at board meetings. He had chaired an effort to reform the organization’s bylaws. He had led important financial presentations. Still, the executive committee did not want to hand the appointment to Bell without a formal interview. “He had been providing reports to the board with increasing frequency, but we hadn’t really had the opportunity to let him loose to talk about his vision,” Barrows recalls.

Barrows says the executive committee found Bell’s presentation of his vision inspiring—his work with Lewis honing his presentation skills had obviously paid off. During the first of the two sessions, Bell went through what he felt were Spertus’ strengths and weaknesses. He assured the committee that his approach to Spertus’ financials would be influenced by the 2008 crisis; he pledged to be a responsible steward, and grow the organization in a sustainable way. Bell remembers the theme of his presentation being, “Spertus has stabilized; now how do we grow so we don’t remain static but we don’t expose ourselves to another crisis?”

Once identified as a weak spot, Bell’s financial acumen was a shining part of his presentation, Bensinger recalls. “We had been through so much instability after the 2008 crash, so we valued the stability he offered,” he says. “You now had someone who had worked very hard and who understood our books, who understood our accounting; it’s obviously a great boon to a board chair to have a collaborator with those skills.”

During the second session, Bell not only answered questions, but also posed a list of his own questions for the committee. The trustees felt this tactic reflected Bell’s commitment to remain both a teacher and a learner, even in an executive role. Whatever doubts some of the board had about handing the CEO position to Bell without a national search dissipated. “We were prepared to do a search if the assessment left us with doubts,” Barrows says. “But once we had spoken with him, we sort of looked at each other and the sentiment was, ‘Why would we look any further?’ We knew he could do the job.”

**Passing the Baton**

The promotion of a senior executive into a CEO role is perhaps the most difficult transition in organizational life; Michael Watkins, a professor of management at IMD and author of the book “The First 90 Days,” calls it the “corner office crucible.” To ensure even the most promising internal hire ultimately succeeds as CEO, the board’s and outgoing CEO’s responsibilities for ensuring a successful transition cannot end when the deal is inked.
To be sure, Bell’s transition was made easier by the prep work he had done with Lewis, his familiarity of his surroundings, and the strength of existing relationships with staff. But he still required support. Lewis’ first act of assistance was to step away. He took a six-week vacation to Israel after Bell took over—Peter Bensinger equates this act to the concept in Judaism of “tsimtzum,” or God stepping back to make space for other leaders. Lewis accepted a teaching role at Spertus upon his return to supplement his work as a leadership consultant, which allowed him to be close by if Bell needed advice. The board paid for Bell to attend a seminar for new college presidents at Harvard University, and let Bell know there would be further funds for his professional development if needed.

Bell’s relationship with Bensinger would prove particularly crucial during this period. In a survey of nonprofit leaders by the consultancy Bridgespan, only 50% of CEOs said their boards were clear about how they would work together in the first few months on the job. Bell and Bensinger found a unique way to avoid this hazard. During their first meetings after Bell’s appointment, Bensinger suggested that the duo should write up a “ketubah” together—traditionally a marriage contract signed

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DELIVERING A POWERFUL PRESENTATION

In a 2013 article for Harvard Business Review, Chris Anderson, the curator of TED, offered TED’s secrets for helping speakers prepare for a killer presentation:

- **Frame the talk as a journey**
  Figure out where you will begin and end; don’t cover too much ground.

- **Plan your delivery**
  It’s fine to memorize prepared text, but don’t read off a sheet or screen.

- **Develop stage presence**
  The biggest mistake is moving your body too much; make eye contact.

- **Use multimedia if possible**
  If using PowerPoint, never recite bullet points on the slide; it is better to avoid text and use data visualizations, photographs, or illustrations.
by witnesses and a rabbi, but in this case, a document that would set forth principles governing their relationship and interactions. Bell loved the idea, so the duo drew up a formal contract for how they would behave toward each other. Their ketubah included precepts such as “first seek to understand and then to be understood,” “avoid surprises;” “ask powerful questions of each other;” “always name the pink elephant that we’d rather not discuss;” and “ask each other ritually what is important, so the routine doesn’t trump the important.” Both men keep a copy of the contract in their desks and produce it during one-on-one meetings.

The last item on the agreement stipulated that the pair would meet for face-to-face meetings at least monthly, but in practice, during Bell’s first year, the pair has met every two weeks. “It’s like going into the ark two by two—the lay leader and the professional,” Bensinger says. “That partnership is essential if the organization is going to achieve its goals.”

One year into the job, Bell has already made some changes to stamp his own identity on the CEO role. He writes a weekly round-up of what has been on his calendar and shares it with all Spertus staff. He immediately changed the door to his office so it included a glass pane—a symbol of his commitment to transparency. And he’s led the drafting of a new strategic plan with the board, one focused on innovation and new programs.

These unique innovations please Lewis, who remains a confidant and close colleague through his teaching at the institute. Careful planning, hard work, and a commitment to learning were the keys to Spertus’ successful CEO transition. Asked what he felt was the most crucial component for ensuring Bell’s success, Lewis pauses. “I think it was making sure that Dean wasn’t going to step in on day one to a whole field of things that he wasn’t familiar with. And I have to say, last July, when I stepped down, he stepped up. I feel like it was as planful and smooth a transition as any textbook writer or teacher of leadership could want.”

CEO ONBOARDING

CEO onboarding remains a weakness in for-profit and nonprofit organizations.

A Bridgespan survey of nonprofit CEOs found that nearly half (46%) got little or no onboarding help from their boards. As one executive told Bridgespan, “The board essentially said, ‘We’re glad you’re here. Here are the keys. We’re tired.’”
Covenantal Ketubah
Between Spertus
President/CEO and
Chairman

Whereas Dean Bell is the new CEO of Spertus Institute for Jewish Learning and Leadership, serving under a five-year contract effective July 1, 2018; and

Whereas Peter B. Bensinger, Jr. is the Chairman of Spertus for a second two-year term effective July 1, 2018; and

Whereas the CEO - Chairman relationship is a covenantal one rooted in the mutually shared belief that vibrant Jewish communities are learning Jewish communities and that great Jewish communities need great leaders; and

Whereas the CEO and Chairman are committed to serve the Spertus mission to offer dynamic learning opportunities, rooted in Jewish wisdom and culture and open to all, designed to enable personal growth, train future leaders, and engage individuals in exploration of Jewish life; and

Whereas the CEO and Chairman mutually commit to exemplify in word and deed the leadership behaviors that Spertus upholds; and

Whereas the CEO and Chairman wish to establish a brit setting forth the premises of their covenantal relationship against which they may measure their behavior annually before the Spertus annual meeting, as well as in regular ongoing meetings;

Now, therefore, the CEO and Chairman do mutually promise to seek to conform their conduct to the following guiding principles of relationship:

1. To first seek to understand, then to be understood
2. To provide support, counsel, and friendship to each other
3. To pay attention to what is going on with the other person
4. To tell each other the whole truth and avoid surprises
5. To identity and discuss “pink elephants,” both internal and external
6. To ask each other powerful questions
7. To ritualize asking what’s important so that the immediate does not trump the important
8. To be responsive in timely and respectful/collegial ways
9. To address with candor underperformance and/or challenges; to celebrate success with vigor
10. To stay in our respective lanes of management and governance, putting the best interests of the institute first and providing support to each other in accomplishing our mission
11. To cultivate our successors
12. To meet face to face at least monthly
In 2017, Jeffrey Summit decided he was ready to step down as executive director of Tufts Hillel—a position he had held for 38 years. The organization had expanded tremendously since 1979, the year Summit moved into an office that had previously been a storage closet for a refrigeration unit. Tufts Hillel was now housed in a new 10,000-square-foot center on campus, the construction of which Summit had overseen. It employed nine full-time professional staff (including two rabbis), served around 700 Jewish students, had an annual budget of $1.5 million, and managed a $6.4 million endowment.

As Tufts Hillel had grown, so too had Summit. Over the course of his tenure, he earned a Ph.D. in musicology, secured faculty appointments at Tufts’ Department of Music and its Judaic Studies program, authored two books, and released a Grammy-nominated musical CD, all while managing an increasingly complex organization.

These changes—both in Tufts Hillel as an organization and in Jeffrey Summit himself—raised a dilemma for its board of directors, one that any organization replacing a beloved, long-serving chief executive might face. What sort of successor should board members look for? A less-experienced executive who—like Summit 38 years ago—is on the verge of their best work and able to oversee an organization through four decades of growth? Or a more experienced executive who—like the Summit of 2017—has already proven themselves to be a capable leader and manager?

The Tufts Hillel board wasn’t sure. It knew it was in a strong position: It had plenty of time to run a search (Summit had given them almost 18-months’ notice); the board was cohesive and well-run; the organization was financially healthy; and Tufts Hillel’s strong reputation suggested that it would have no trouble attracting talented candidates. But this was the first time the
organization had undertaken a CEO transition in a generation; a certain amount of uncertainty was inevitable.

“There’s always some anxiety,” explains Carrie Darsky, the director of executive talent management at Hillel International, who acted as a consultant on the Tufts Hillel search. “Many board members have never done a CEO search before. They are volunteers and are time-constrained. And when you’re replacing someone like Jeff, who has held down the fort for so many years, there can be incredible fear around what’s happening.”

Fortunately, the fear and uncertainty didn’t last long. Rather than fixating on the outcome, the Tufts Hillel board relied on a methodical process to navigate the transition. One of the board’s first decisions was to engage Hillel International to work with it on the search rather than run an independent search process. It took guidance from Darsky; Mimi Kravetz, Hillel International’s chief talent officer; and other consultants from Hillel International, an organization that advises 25 to 50 local Hillel affiliates on CEO searches every year and has a tried-and-tested approach to successions. The process led the board to a narrower profile of the type of leader it required and, eventually, to a candidate that the board could unanimously endorse. And yet, even as it adhered to a structure and a plan, it never lost the human touch. “You want how you handle the search to reflect on your organization—on its mission and its values,” Darsky explains. “And I think in this instance the search committee and the entire board can be proud.”

Succession Planning

The story of Summit’s succession begins in the early 2010s, when the Tufts Hillel board broached the delicate subject of a leadership transition with Summit. It told him that it was delighted with his performance and keen for him to stay on in the role for as long as he felt engaged and vital, but that it understood that no executive remains in place forever. Summit told the board that he just wasn’t ready to step down and that he felt he “still had a lot of time left,” according to Ted Tye, a board member and former board chair who would later chair the search committee.

The board was right to check in with Summit about his plans—Summit’s motivations and goals were indeed changing, though it took him some time to process and understand the internal change. “When is it time to go?” Summit asks rhetorically as he remembers this period in his tenure. “I struggled mightily over several years with that question because I loved the work. And I had no desire to retire.”

But through the early 2010s, Summit realized that his evolving interests no longer neatly aligned with college-age adults. “I remember talking at a Shabbat and just hearing a whoosh
as what I was saying went over the heads of the students,” he recalls. “The issues that I wanted to talk about—sustaining meaningful work, building family, challenging how we used technology—just weren’t resonating with them.” At the same time, Summit was growing increasingly frustrated with the difficulties in bringing pro-Israel and pro-Palestinian students together in productive dialogue, and he felt drawn to teaching and mentoring colleagues in their 30s, 40s, and 50s. “When I found myself wanting to engage with new challenges, I began to allow myself to think about what it would be like to leave this amazing, wonderful thing that I had built over many years,” he explains.

Although it would have been best practice for the board to repeat its conversation with Summit each year, it had at least removed any stigma around Summit’s departure by broaching the subject once. So when Summit decided to step down in 2017, he felt comfortable approaching the board about his desire to do so.

“As much as we’d all like to be good planners, the realization that a long-serving executive wants to step down often comes upon the executive fairly quickly. So I think the lesson here is that when you have an executive approaching their 60s, despite the fact that they may not be interested in talking about a succession, it’s always good to let them know that the door is open for them, and that you want as much notice as possible so the process isn’t rushed,” Tye says.

Summit told the board he would stay for 18 months to ensure enough time to identify and hire a successor, and then spend at least six to eight weeks onboarding the new executive director into the role. To kick off the search, the board met with Hillel International’s Aviva Snyder, a campus support director provided to Tufts by Hillel International, and Chief Talent Officer Kravetz (Darsky would eventually join the duo). As there were no insider candidates—Summit’s long-serving associate director had left for a new opportunity elsewhere the year before—the board asked the trio to engage in a far-reaching international search. Engaging Hillel International gave the Tufts board access to the organization’s extensive network of potential candidates (especially those not actively looking for a new role and who might otherwise not respond to a job posting) and also promised to dramatically reduce the time commitment needed from search committee members.

Hillel International’s first step was to set up a search committee. Tye, a local real estate developer and Tufts Hillel board member, assumed the chair and, with assistance from both Kravetz and Snyder, filled in six other members. (Darsky would later call Tye one of the best search chairs she had ever worked alongside.) Along with Tye, the committee would eventually be
composed of two other board members: the Tufts university chaplain and one undergraduate student. Darsky and Snyder joined the committee as “non-voting members.” Following generally accepted best practice, Tye decided not to invite Summit on to the committee.

“One of the hardest things to tell an executive director is that they can’t be involved in the search,” Darsky explains. “They’ve been the sole decision-maker for the organization on every important issue for a long time. They often have a deep love and sense of loyalty to the organization. And yet you have to explain to them that they need to sit this one out. It’s tough.” Darsky says that Summit immediately understood—and she reassured him that he would have the chance to meet all the finalists and offer his feedback to the search committee before it made its decision.

The next step was to collect feedback from Tufts Hillel’s stakeholders to help scope the job description for Summit’s replacement. Kravetz and Snyder met with Tye to perform a stakeholder-mapping exercise that identified the key constituencies affected by a new executive director appointment. Snyder eventually interviewed students, alumni, the university chaplain, donors, the local federation, and the chief of staff to the university president.

In each interview, Snyder used a mental trick to help the stakeholder think through what qualities they should seek in a successor. “I told them ‘Let’s put Jeff in a box and put him away for a while,’” she recalls. “It often resulted in a laugh, but these were big shoes to fill, and we had to imagine what might be best for the organization beyond Jeff.” Snyder then asked some variation of the following questions:

- What should be known before the search begins?
- What qualities does the new executive director need to be successful?
- Given what is known about the organization, what can be done, right now, to capitalize on new leadership?
- What should we retain that’s excellent, and what can we achieve in this next phase for Jewish life on campus?

Snyder circulated a synthesis of the stakeholder interviews to the search committee, and the members used it to help scope the job description. Snyder says this process brings two benefits in addition to informing the search: It unearths hidden problems and opportunities within the organization that the next executive director must address. But more importantly, it helps secure buy-in from major stakeholders, which in turn helps set up the new executive director for success.

“It’s important to talk to people outside the organization—what are the needs of the university, the students who are less
Shortly before Summit told the board he would be stepping down, the board assembled a committee to draft a strategic plan—and hired a consultant to help the process. “We put that on ice,” Tye explains. “We didn’t want to complete a strategic plan and then have a new person come in with a completely different vision, so we decided to delay it.” However, the search committee and the board still undertook some “visioning” work to assist in the crafting of the job description. Snyder and Darsky led committee members through an exercise where they cast their minds four years into the future and imagined that the first class of undergraduates overseen by the new executive director was graduating. What would Tufts Hillel be doing differently? What would be the same? How would the organization feel? What are the leadership qualities the organization needed to achieve this vision? The duo also led the committee through an exercise to articulate the “deal breaker” qualities that any candidate under consideration must possess.

“As it happens, we landed on a job description that was not dissimilar to [Summit]. But that makes sense because he is a great executive director,” Snyder says. “It’s important that the process bore this out as opposed to going in with an assumption that we’d ‘find someone like Jeff,’ so the committee felt confident in their decisions moving forward.” The exercise suggested to the group that it was looking for an experienced candidate rather than a candidate similar to the engaged, the local community partners? If you don’t reach outside, you can get myopic and only focus on your own organization and you’ll miss some of the unmet needs of the people that you serve,” Snyder explains.

**WHAT THE RESEARCH SAYS: SEARCH COMMITTEES**

An ideal search committee should be composed of five to eight people and include a mix of past and future leadership as well as representatives of key constituencies.

**Here is a sample committee:**

- Incoming board chair
- Past board chair
- A member of the executive committee
- Financial chair
- A member of the board with deep hiring experience and expertise
- A board member from a partner organization with which the nonprofit works closely

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Darsky says that part of the miscalculation was the belief that Summit’s stature in the Hillel community would be a powerful draw. In many cases, the opposite proved true: Candidates felt intimidated by Summit’s legacy and therefore reluctant to put their names forward. “We heard ‘I can’t replace Jeff Summit’ a lot,” Darsky says. “We spoke to potential alumni candidates who told us that they entered Jewish life because of [Summit]. Candidates who knew of Summit’s legacy felt intimidated, like the shoes were too big to fill.”

Still, Snyder isn’t convinced the disappointing candidate pool was a setback. There were plenty of talented candidates on the list (indeed many have since gone on to successfully lead other large organizations), but it was only after assessing the profiles of a diverse pool that the committee realized it needed to sharpen its candidate profile. “We had rabbis (both congregational and with Hillel affiliations), non-rabbis, MBAs from the corporate sector, internal Hillel candidates, alumni and non-alumni,” she says. “In this instance, the search committee needed a diverse pool to help hone what they were actually looking for.”

Sourcing the Candidates

At this point, the search committee made what it would eventually come to see as a small mistake. It decided that instead of listing the opening on Hillel’s job board and other recruiting sites, it would rely solely on Hillel International to source the candidates. “We felt that this was a high-profile, desirable job and that we wouldn’t have any problem,” Tye explains. “And we wanted a ‘shotgun’ approach; we were open to looking wide and far and finding a diverse group of candidates.”

Tye’s thinking was not unusual: In an era of LinkedIn—and at a time of record low unemployment, where relatively few people are actively looking for jobs—many organizations have found targeted recruiting to be more successful than a traditional “post and pray” approach. What’s more, Hillel International had a strong Rolodex of senior leaders at Hillel affiliates around the country with relevant experience. Hillel International spoke to over 100 people and did initial screening interviews with dozens of candidates but eventually sourced 15 plausible candidates for the search committee to review. However, none of the candidates stood out as a perfect fit.
came to see that one quality was most important—gravitas. Committee members could not define exactly what that meant, but they all felt they understood it in the way that U.S. Supreme Court Justice Potter Stewart famously expressed the threshold for pornography: I know it when I see it. The committee knew that it needed a strong personality to fill Summit’s role both at Hillel and as the Jewish leader within the university as a whole. Darsky explains: “It could be career gravitas, a person with extraordinary experience that commanded respect; or it could be academic or intellectual gravitas—someone who had published multiple articles or books on a subject. Or it could be someone with a large social media presence. But they came to realize that they needed someone of similar stature to [Summit]. In that sense, the process worked.”

The Importance of Process
Six months into the search, the committee identified three candidates deemed worthy of bringing to Tufts for in-person interviews. However, the committee also decided to briefly post the job description on a few job sites, including Hillel’s. This step would prove crucial: Tufts Hillel’s eventual hire, Naftali Brawer, only applied after seeing the posting online following a conversation with Darsky. Brawer had connections to Hillel International—he was friends with the organization’s chief innovation officer—and had heard about the opening. But it didn’t feel real or concrete to him until he saw the actual job description. “What’s interesting is that he told us he had heard that [Summit] was stepping down, but wasn’t sure what was going on. It was only after he saw the job description that he felt comfortable putting his name forward.”

Brawer—a rabbi, chief executive of a London think tank, author, and prominent voice within the United Kingdom’s Jewish community—immediately impressed the search committee. He also aced the initial “screening” video and phone interviews. In fact, Tye was so impressed that he suggested to Darsky and Snyder that they disinvite the other three finalists to the campus interviews. Darsky and Snyder demurred. One of the messages they had drilled into the search committee from the outset was the importance of process. Deviating by prematurely cutting three candidates not only would reflect badly on Tufts Hillel, but it would also risk alienating potential “second choice” candidates should Brawer not accept the position. “To me, the lesson was only invite a candidate for in-person interviews if you are sure you could happily hire them,” Darsky says. Tye and the committee eventually expanded the finalist pool to five and invited them all to campus for interviews.

Throughout the process, Snyder and Darsky had tag-teamed as the recruiting equivalent of “quality managers,”
ensuring the consistency and reliability of the process. Their goal was to allow as little bias and inconsistency to creep into the search process as possible. The pair asked the same questions in roughly the same order to all candidates during their screening interviews. If a member of the board or search committee referred a candidate, that candidate was put through the same screening process as all the candidates.

At one point, a candidate asked to see the organization’s financials; Darsky and Snyder then sent the financials to all of the candidates even though they hadn’t requested them. While they cracked down on informal, side-channel communication, Darsky and Snyder also ensured that they communicated regularly with the candidates through formal channels. “One of the biggest mistakes I see is search committees that leave candidates hanging for weeks without checking in. In the end, it reassures both committees and candidates to know that they can trust a process and that they know what to expect,” Darsky says.

At one point, Summit made an innocent mistake that broke from protocol: He was contacted by a local candidate who had applied for the role. Summit invited the candidate for a campus visit. “I had to slap [Summit] on the wrist, as that’s unfair to the other candidates,” Darsky explains. “It gives the candidate a leg up through access to information that the other finalists don’t have.”

Darsky says that in many searches, outgoing executives and search committee members are resistant to seemingly cumbersome restrictions and feel they can make the process more efficient by taking short cuts or bending the rules. Darsky defends the

The Importance of Process

Two Israeli academics—Daniel Kahneman and Amos Tversky—were the first to begin to unravel the myth that we can trust our gut when it comes to our most important decisions. The pair showed that unstructured decision-making can lead to inconsistency and bias. It is almost always better to put our trust in processes rather than intuition—to structure our decisions around practices validated by research.
process by explaining that candidates appreciate a professionally run search—one that instills confidence that their confidentiality is protected and that puts in place a fair evaluation procedure for all candidates.

**The CEO’s Journey**

As the search committee progressed through the hiring process, Summit was going through his own journey. Yale School of Management’s Jeffrey Sonnenfeld, who wrote eloquently about CEO departures in his book “The Hero’s Farewell,” describes the end of an illustrious CEO’s tenure as “a plunge into the abyss...a kind of mortality.” While Summit wasn’t planning to retire—he would continue to teach and also do consulting for Hillel International—the transition out of the corner office proved more challenging than he anticipated. “If a person is making a change after many years, even if the situation is good, the change is good, it’s still going to be a complicated personal process,” Sonnenfeld explains.

Summit’s situation was confounded by the fact that for six months after he decided to step down, he didn’t tell anyone outside of his immediate family. This put a lot of stress on his wife during that time. He felt that the Jewish communal world was too small for even his closest friends—or parents—to be trusted with his secret. After his announcement, Summit used money from his discretionary fund to hire an executive coach. While he felt the engagement was helpful, the coach was focused on the tactical aspects of an executive transition. “He was a great coach, but he wasn’t a therapist. In retrospect, I didn’t have enough people to talk to, and I put too much burden on my family as a result,” Summit says.

Summit believes that the board chair at organizations with long-serving chief executives should have the courage to broach the subject of mental health with the executives as their departure approaches. He suggests framing the conversation in terms of “spiritual health”—and asking what the executive needs in terms of support through a major transition in their lives. In Summit’s case, he found solace through teaching and learning. He partnered with Scotty McLennan, a lecturer at Stanford University’s Graduate School of Business, to teach a summer seminar addressing executive transitions at the Tufts European Center in France titled “What Happens Next?”

Through the teaching experience, Summit came to see that the mix of emotions he felt around the departure was natural and had to be worked through rather than dismissed. “You don’t have to do it all at once,” he says. “I realized the year I stepped down from Tufts didn’t have to be a happy year. I didn’t need to feel joyful or happy all the time. I just needed to pay attention to what I was feeling—and be patient. That was a big revelation for me.”
Crossing the Threshold

After working under Summit’s leadership for four decades, it was natural that the organization would go through some of the same transition pains that Summit personally experienced. After Brawer’s appointment as Summit’s successor, the duo spent six weeks at the organization together. The overlap allowed Summit to not only introduce Brawer to important donors, but also allowed him to be seen wholeheartedly endorsing his successor among staff and other important stakeholders. Brawer would come to see the overlapping period as an essential element of his onboarding.

Inevitably, however, the ride wasn’t always smooth for the staff—or Brawer. The organization had found a deep groove under Summit, and a new leader caused a certain amount of disruption. Anticipating this, Summit had secured a retention bonus for his staff members to encourage them to stay on through the transition. Darsky felt that the board should have gone one step further; she had advocated for an interim CEO to the Tufts Hillel board before it undertook the search. She felt that an interim executive director would provide a “decompression chamber” and would allow the eventual permanent hire to take over a staff already accustomed to new leadership. While her suggestion wasn’t adopted, the board did internalize her advice to be patient in the early weeks of Brawer’s tenure and accept that it might take some time for him to settle in to the role. “And I told Brawer, too, that while I was sure he would be successful, he should be prepared for a bumpy takeoff,” Darsky recalls.

The staff and Brawer’s unease came to a head late in the transition period. As the day of his official departure approached, Summit spent fewer hours in his office at the advice of his executive coach; it was a way to symbolize the shift of authority to Brawer. One day, Brawer received a meeting request from a staff member, who suggested they meet in the executive director’s office. Brawer felt uncomfortable with the suggestion—Summit was technically still the executive director. To his surprise, this frustrated the staff member. She felt Brawer was the new director and so the meeting should take place in the director’s office.

For Brawer, this moment made clear the frustration the staff was feeling over the transition. “The staff was confused; they weren’t sure who was in charge,” Brawer recalls. He called an all-staff meeting to address the tension. Drawing from his rabbinical studies, Brawer prepared remarks about the concept of a “liminal space,” which can be defined as “the period between ‘what was’ and ‘what’s next.’” He said liminal spaces were inherently uncomfortable and unsettling—akin to the moment between when a trapeze artist lets go of one bar and catches another. “I spoke
ONBOARDING FOCUS

Transitions into new roles are the most challenging times in the professional lives of leaders. Bridgespan identified four critical elements that boards should focus on for an effective onboarding process:

- Establish a transition committee and onboarding plan.
- Collectively set the new leadership agenda with the CEO.
- Clarify roles and working norms between the executive and the board.
- Establish a performance management and support plan for the CEO.

about liminality, and I let them share what it meant to them. I spoke from my heart. My wife and my youngest hadn’t yet moved from London. I was living in temporary accommodation; everything was in flux. I explained how this was both exciting for me but also unsettling. We have a very emotionally intelligent team, and they could use this conversation to kind of navigate through [the transition period].”

A few weeks later, on Summit’s last day, Summit and Brawer used another ceremony to mark the end of the liminal period. The entire staff congregated in Summit’s office. Summit had cleaned everything out; the empty room was another act of intentional symbolism. With the staff huddled around, Summit shared a passage from the Torah. Members of staff shared reflections and memories of Summit’s tenure in what Brawer recalls as a “ritualized process of letting go.” The moment marked a new era after 39 years—for Brawer, for the staff, and for Summit. “I thought it was very beautiful,” Brawer recalls. “The threshold was crossed.”
The following Search Agreement is established on [Insert Date] by and between Schusterman International Center and [Local Hillel].

[Local Hillel] is excited to partner with Hillel International for its shared goal of engaging the best Executive Director for [Local Hillel]. To ensure a successful search, we agree to the following:

1. Hillel International Talent Team Responsibility: In order to manage the search, the Hillel International Talent Team will perform the following activities:
   (a) Stakeholder/Campus Intake & Agreement: Conduct interviews with designated [Local Hillel] stakeholders in order to clarify the responsibilities of the position, define the competencies and characteristics of an ideal candidate, understand the culture of the organization, and discuss the logistics of the search.
   (b) Job Documentation: Compose/advise composition of job description to ensure that search advertisements conform to Hillel International’s established best practices and succeed in attracting desired candidates.
   (c) Search Strategy: Collaborate to discuss the search strategy, which outlines the search’s sourcing plans, resume screening protocol, candidate interview questions, and hiring process details.
   (d) Candidate Recruitment: Coordinate all recruitment efforts, including posting the position in a variety of sources, extensive sourcing in network and beyond, directing outreach to Hillel International’s network, and supporting [Local Hillel] in leveraging its own network to attract candidates.
   (e) Application Portal: Host an online application portal, through which candidates will submit application cover letters and resumes.
   (f) Candidate Management: Catalogue and carefully track all applications and help manage communications with candidates, in conversation with [Local Hillel].
   (g) Resume Screen: Review applications against pre-established qualifications to determine whether candidates advance to the next round of the search.
   (h) Skype Interview: Conduct
thorough Skype interviews with the most promising candidates to assess their degree of fit with the position requirements and organizational culture.

(i) Finalist Management: Create a “Candidate Portfolio,” consisting of a resume, cover letter, and assessment of the candidate’s fit with requirements of the position, for each candidate that is to be transitioned to [local Hillel] for consideration by search committee.

(j) Search Committee Support: Support search committee, as requested, in conducting effective and compliant interviews with promising candidates. Stay in regular contact to get updates on the search and provide guidance on the search process and candidates as needed. Debrief [local Hillel] interviews and provide guidance regarding candidates’ next steps in the process.

(k) Reference Checks: Support hiring managers, as requested, in conducting effective and compliant reference checks for any finalist(s) to whom [local Hillel] is prepared to make an employment offer.

(l) Status Reports: Deliver weekly reports regarding the status of the Search to date.

(m) Sales: Through nuanced conversations and holding a global perspective, help move the candidate to a Yes, should they receive an offer.

(n) Meeting with our CEO/President: Coordinate the interview call with Eric Fingerhut or his delegate, including preparation of supporting documentation, resume & dossier.

2. [LOCAL HILLEL] Responsibility: In order to support the Search, [local Hillel] will:

(a) Consult with the Hillel International Talent Team to discuss the needs and parameters of their search.

(b) Finalize and approve the job description.

(c) Participate in training from Hillel International to run a search and interview for success.

(d) Have pertinent search chair available for regular conversations and meetings with [Hillel International] as needed throughout the Search.

(b) Leverage the [local Hillel] network to support the Search, as deemed appropriate by [local Hillel], by sending out correspondence to professionals, leadership, funders and partners to solicit candidate referrals.

(c) Outline and stay committed to a
search timeline.

(d) Ensure ongoing and effective feedback and communication with Hillel International throughout the search.

(e) Notify Hillel International immediately of any changes in the position or hiring plan.

(f) Allow for time to finalize candidate offer, in support of Eric Fingerhut, Hillel International’s CEO and President’s role in interviewing and approving final candidate.

(f) When sending out candidate announcements, press releases, or sharing search process with community, include Hillel International.

Supporting candidates as they embark on a search with Hillel not only reflects well on Hillel but also speaks to the mitzvah of helping someone find their calling. Hillel International and the campus Hillel will strive to best serve the campus and the candidates as well as facilitate a robust, efficient search process.

Should the candidate experience suffer as a result of either party neglecting these roles, the Hillel International Talent Team reserves the right to step in to manage those issues, including communicating with the candidate pool on behalf of the campus or removing the job from public view until the issues are resolved.

We agree to work collaboratively to find top talent for Hillel’s searches and to inform that process with proficiency, excellence and Jewish values.

3. ADDITIONAL POLICIES:

(a) Hillel International will manage all sourcing, advertising, and outreach through available networks, contacts and leads.

(b) [Local Hillel] and Hillel International will pool their resources and networks to expedite the Search and maximize its scope.

(c) [Local Hillel] agrees to refer potential candidates arising from both internal and external sources to Hillel International so that those candidates will receive equitable consideration against the same standards as the rest of the candidate pool.

(d) [Local Hillel] should not run parallel interview processes or meet independently with candidates outside of the process established with Hillel International.

(e) Hillel International reserves the right to communicate directly with any
candidate for the position at any time during the search, as well as to conduct post-search debriefing and follow-up with the individual who is hired into the position.

(f) [Local Hillel] understands that, outside of Hillel International’s control, candidates may simultaneously apply for this search as well as for other searches, including the possibility of other searches being managed by Hillel for other Hillel openings. As appropriate, Hillel will endeavor to inform [local Hillel] whenever it is aware that such a situation has occurred, but the candidates will retain sole power to prioritize their available opportunities.

(g) [Local Hillel] agrees that all applicants to this specific search who are not actively being considered as viable candidates in the Search may be considered by Hillel for positions at other client organizations.

Name:
Title:
Date:

Name:
Title:
Date:
Eben Harrell is a senior editor at Harvard Business Review (HBR). Before joining HBR, Harrell worked as a foreign correspondent in the London bureau of TIME; as an associate at the Harvard Kennedy School; and as the head of thought leadership for L.E.K. Consulting, a strategy consultancy. An award-winning reporter, writer, and editor, Harrell has published articles in TIME, The Economist, The Washington Post, Sports Illustrated, and other major titles. In 2017, Harrell and UC Berkeley professor Dacher Keltner won the Warren Bennis Prize, which is awarded each year by the USC Marshall School of Business to the editor and author of the best article on leadership in Harvard Business Review. Harrell holds a master’s degree from the University of St. Andrews and a bachelor of arts from Princeton University.
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