



MAROM GROUP

MAROM GROUP
PHILANTHROPIC SOLUTIONS

ASSESSMENT OF LAY LEADERSHIP IN THE JEWISH NONPROFIT SECTOR: CHALLENGES AND OPPORTUNITIES IN BOARD MEMBER DEVELOPMENT

Prepared by Marom Group
For the Jack and Goldie Wolfe Miller Fund

PURPOSE..... 3

BACKGROUND 3

EXECUTIVE SUMMARY..... 4

METHODOLOGY OF THE FIELD ASSESSMENT 5

 Defined Terms 5

 Taxonomy 5

ANALYSIS OF THE NONPROFIT ECOSYSTEM..... 6

 The response of the U.S. nonprofit landscape to major global trends in the nonprofit sector..... 6

 The central internal challenges of secular boards in the U.S. nonprofit sector. 7

 Unique challenges pertaining to the Jewish philanthropic sector in the U.S..... 9

MAPPING OF TRAINING PROGRAMS FOR BOARD MEMBERS AND LAY LEADERS..... 12

 Academic Certification 12

 Curriculum 12

 Duration and Format..... 12

 Audience, Eligibility Criteria and Geography 13

RECOMMENDATION 14

 Solution to a gap between the current needs in board member and lay leadership training and existing offerings..... 14

 Product Outline 14

CONCLUSION 15

 Appendix A..... 16

 References..... 17

PURPOSE

The Marom Group conducted this field assessment with the following goals: (1) to analyze the climate and the needs of the Jewish nonprofit sector in the United States, especially as they pertain to the development of its leadership, and (2) to survey the available educational, training and opportunities for current and future board members of these entities to determine whether there are sufficient options to prepare such leaders.

BACKGROUND

Since 2009, the Marom Group has offered tailored, full-service, philanthropic solutions to individuals, foundations, corporations and governments. We operate globally, primarily in the United States, Europe and Israel, focusing on maximizing philanthropic return on investment, ensuring that a donor's vision, or an organization's mission, is fulfilled and the necessary and desired social impact is achieved.

The Jack and Goldie Wolfe Miller Fund* engaged the Marom Group to conduct qualitative field assessment of current trends of the Jewish nonprofit sector in the U.S., and in particular, the role of board members in making a desired impact in this modern environment. In addition, we gathered quantitative data to provide additional context and support.

The nonprofit sector in the United States currently exists in a state of growth and flux. It faces and anticipates dramatic paradigm shifts due to generation change, rapid technological progress, external global factors, and internal capacity challenges. The Jewish nonprofit world is susceptible not only to these cross-sector factors, but it also confronts its own unique landscape and set of potential obstacles. Thus, these evolving dynamics have created a new host of challenges for its leadership, particularly for the boards responsible for funding, directing, and overseeing all aspects of these increasingly complex nonprofit organizations.

To address these issues, nonprofits need outstanding leaders to maximize impact, inspire and support professionals, forge meaningful partnerships, and be ready and able to make difficult strategic decisions. While recruiting, cultivating and retaining board members has always been on the agenda of many nonprofits, the proper training of such board members continues to be vastly overlooked.

Recent studies and literature in the field, such as surveys of board members of both secular and Jewish nonprofits, clearly indicate that board members are often ill-prepared and lack the requisite training to handle the challenges of the evolving nonprofit landscape. Today's boards are required to be more than fundraisers. They must be partners with professional staff in developing and implementing the mission and strategy of an organization in order to satisfy their ever more sophisticated and demanding donor base.

* The Jack and Goldie Wolfe Miller Fund, a fund of Jack Miller Family Foundation, endeavors to maximize the impact of its grantmaking by concentrating its support where it can be most effective and leveraged. Its funds, when possible, are deployed strategically to seed fund new initiatives that will attract partners and form meaningful collaborations.

EXECUTIVE SUMMARY

The Jack and Goldie Wolfe Miller Fund partnered with the Marom Group to conduct a field assessment of current trends of the Jewish philanthropic sector in the U.S., and in particular, how to optimize the impact of board members in this modern environment. This field assessment had two main goals:

GOAL 1:

To analyze the climate and trends affecting the Jewish nonprofit sector in the United States, especially as it pertains to the development of its leadership.

KEY FINDING: The nonprofit sector in the United States is currently in a state of flux. Generation change, rapid technological progress, growing need for cross-sector collaboration, and internal capacity challenges are shifting the paradigm of the sector.

KEY FINDING: The Jewish world faces a disparity between a growing number of nonprofits, a shrinking leadership pipeline, the emergence of a large group of new donors with substantial charitable assets with little prior experience in giving, and a more sophisticated and demanding group of experienced donors. This evolving landscape has been compounded by other domestic challenges, ranging from globalization and polarization, to professional development and retention. The consequence of these trends has been a shift in giving priorities.

GOAL 2:

To survey the available educational and training opportunities for current and future board members to determine whether there are sufficient options to prepare such leaders.

KEY FINDING: Board members in the Jewish nonprofit sector acknowledge little or no governance structure within their organization, and they admit that they lack understanding of their organization's purpose and the role they are supposed to serve.

KEY FINDING: While there are a number of training programs for board members and lay leaders of nonprofits, the current offerings only address certain components and requirements of the field. Most courses are limited by curriculum composition, duration and format, and specific eligibility criteria.

RECOMMENDATION: Given the scope and intensity of the challenges and trends previously outlined, the market may be ripe for an additional alternative, that prepares board members for the entire scope of responsibilities. We identified an opportunity to create a medium-length (5-7 months, approximately 12 modules of varied length), high quality, practical, holistic training program. The program will be open to active and potential board members of Jewish nonprofits without similar barriers to entry.

CONCLUSION: This assessment has identified that there is an insufficient attention given in the sector to the development of board members, whose job it is to guide, govern and steward Jewish nonprofit organizations. Moreover, there is a need to tackle this deficiency in board member readiness with a comprehensive, professionally prepared and administered program that proactively addresses this growing priority. We contend that comprehensive board member training should become a widely used and sought after resource for every potential board member.

METHODOLOGY OF THE FIELD ASSESSMENT

The three major sources of the information:

1. **Open source** research examining key data and available reliable information on global trends in philanthropy and the nonprofit sector in the U.S. (research reports, analytical articles and reviews; for the full list of sources see the Reference list).
2. **Conversations with selected individuals and influencers** who are well-informed about the current state of boards and board training, and who can give objective observations regarding the state of, and the need for, board preparation¹.
3. **In-depth analyses of current offerings in the field** that are aimed to train and educate lay leadership and board members to help realize the mission of the organizations they serve, capturing the data specified in the chart below (See Appendix A)².

DEFINED TERMS

For the purposes of the Field Assessment, the terms “board member” and “lay leader” are defined as follows:

- **Lay leaders** – individuals who dedicate their personal time, assets and network to advancement of the organizational mission on a volunteer basis (as opposed to paid professionals).
- **Board members** – a subset of lay leaders who, in addition to their voluntarily goodwill involvement in an organization, are nominated and elected to undertake certain governance and supervisory functions of organizations.

TAXONOMY

Training program	Credibility				Curriculum			Duration			Format			Audience			Eligibility criteria						
	Currently active (New Enrollments)	Organization	Est.	Academic partner	Certification	Overall Level	Jewish Content	Practical skills	Short-Term (Up to 1.5 month)	Mid-Term (1.5 – 6 months)	Long-Term (6 months and up)	In person	Online	Cohort-based	Target	Alumni	Geography	Selection-based	Age	Prior involvement	Organization Type	Cost	Other

1 The conversations we have had with stakeholders thus far have been informal. We are in the process of deploying stakeholder surveys to, and conducting focus groups of, potential partner organizations, relevant Jewish nonprofit organizations and possible target participants. The data collected from those surveys and focus groups will either be incorporated in an updated version of this document, or it will be presented in a different format as we move towards the curriculum design phase.

2 At the request of the Jack and Goldie Wolfe Miller Fund, the scope of our diligence was focused on programs that could potentially serve the greater Chicagoland area. Consequently, while we did evaluate certain prominent national and/or international programs, our analysis of secular academic institutions was informed by geography.

ANALYSIS OF THE NONPROFIT ECOSYSTEM

THE RESPONSE OF THE U.S. NONPROFIT LANDSCAPE TO MAJOR GLOBAL TRENDS IN THE NONPROFIT SECTOR

The global philanthropic economy is constantly changing, and nonprofit boards need to be nimble and fluent in evolving trends in order to anticipate, adjust and respond effectively.

1. DISPARITY BETWEEN GROWING NUMBER OF NONPROFITS AND LEADERSHIP PIPELINE

Today the United States witnesses the unprecedented growth in the number of nonprofit entities. There are more than 1.5 million nonprofit organizations in the United States. In the last decade alone, the number of foundations in the U.S. increased by nearly 30% (from 67,736 in 2004 to 86,726 in 2014). Moreover, community philanthropies are among the fastest growing institutional forms of giving around the globe, and almost 75% are less than 25 years old.

At the same time, it is estimated that in approximately five years, a significant share of nonprofit senior leadership (including professionals and board members) will retire or leave the sector. In the Jewish nonprofit sector this number may reach 75% to 90%. In addition, the vast majority of new CEOs are not even hired from within the sector, let alone from within the organization.

This dramatic growth in nonprofits, combined with the possibility of an imminent leadership vacuum, creates an urgent need for training and professional development for boards and staff to ensure efficient transition and succession.

2. GENERATIONAL TRANSITION OF WEALTH AND NEW GIVING PRIORITIES

There has been a significant change in the structure of wealth in the United States. Between 2007 and 2061, over \$59 trillion total will be transferred across generations. In addition to inherited wealth, techies, hedge funders, and others in the Next Gen are wealth creators, often in staggering amounts. Many members of this emerging group are beginning to deploy that wealth in aggressive and innovative ways. Generation X and Millennial philanthropists have vastly different ideas than those from previous generations regarding philanthropic implementation, preferring to remain much more hands-on and engaged, demanding much more rigorous focus on data and measurable progress.

The emergence of a large group of new donors with substantial assets, and their desire to “contribute” to charitable causes, with little prior experience or expertise in giving, makes the education of both current and future board members vital.

3. GROWING NEED FOR CROSS-SECTOR COLLABORATION

Organizations that may have traditionally focused on just one issue or location are becoming more attuned to globalization and innovative collaboration. The scope of the projects nonprofits implement is increasingly complex, requiring boards to be more open-minded, agile and to think more broadly than ever before.

To this end, boards must be able to adjust to the new paradigm of philanthropic giving, which makes proper training indispensable.

4. NEW MEDIA & TECHNOLOGY LEVERAGING

- **Social Movement Hashtags Propelling Philanthropy:** Social media has gained increased importance in the world of philanthropy. Today it is more than a new communication tool; #Hashtag movements create their own social movement economy, as drivers of conversations and action within and for philanthropic movements around the globe.
- **Giving circles** are one of the most popular and rapidly spreading strategies to democratize and diversify philanthropy, engage new donors and increase local giving. Out of 1,200 giving circles that exist today in the U.S. alone, almost half have emerged during the last decade.
- **Crowdfunding** shows even more rapid growth: from 2013 to 2014 donations to and the number of reward-based crowdfunding platforms grew dramatically (45% and 84% respectively) and totaled over \$3 billion worldwide in 2014.

The momentum for growth and diversification of social movements, giving circles and crowdfunding platforms will only continue to expand and be an increasingly important facet of the philanthropic landscape in the years to come.

Thus, proper training is necessary not only to raise awareness among boards about the potential power of social media, but it is essential to equip them with the strategies to galvanize support for their causes, identify influencers, efficiently transmit their message to younger generations, and to monitor and consciously leverage the emerging social movements and trends.

THE CENTRAL INTERNAL CHALLENGES OF SECULAR BOARDS IN THE U.S. NONPROFIT SECTOR.

Over the past several years, the nonprofit sector has become aware of the critical state of internal capacity, and one might assume that it has also recognized the fundamental role that boards play in meeting stakeholders' needs and expectations. However, the research suggests that there are some glaring deficiencies in the way nonprofit boards are assembled and utilized.

For example, 69% of board members say their organizations have faced one or more serious governance-related problems in the past 10 years. 40% say they have been unable to meet fundraising targets. 29% have experienced serious financial difficulty. Almost a quarter had to ask their executive director to leave or had to respond to an unexpected resignation.

In this section, we explore the core reasons for these challenges and identify the existence of a stark dissonance, not only between professional and lay leadership, but also within the boards themselves. Such internal conflict must be identified, properly framed and addressed in order for organizations to maintain and optimize overall organizational health and efficacy.

1. LACK OF AWARENESS AND DEEP UNDERSTANDING OF THE ORGANIZATION

- Over a quarter of boards do not believe that their fellow board members have a strong understanding of the mission and strategy of their organizations. 32% are not satisfied with their boards' abilities to evaluate the performance of their organizations.
- While 92% of board members say that their boards review data and information to evaluate organizational performance, many are not comfortable with the quality of that data. 46% of boards have little to no confidence that the data their boards review fully and accurately measures the success of their organizations in achieving their respective missions.

2. LACK OF FORMAL GOVERNANCE STRUCTURE AND EVALUATION PROCESSES

- 42% of boards do not have audit committees. Many rely on monthly bank statements to monitor financial performance.
- Two-thirds of boards do not have a succession plan in place for the current executive director or CEO. 78% of boards could not immediately name a successor if the current executive director or CEO were to leave the organization tomorrow. On average, boards estimate that it would take 90 days to find a permanent replacement for their CEO.
- Most boards claim to formally evaluate the performance of the lead professional. However, 39% of such professionals do not establish explicit performance targets against which his or her performance is measured.
- Over a third (36%) of nonprofit boards never evaluate their own performance.

3. LACK OF ENGAGEMENT, UNDERSTANDING OF THE BOARD'S ROLE AND SUPPORT TO THE EXECUTIVE LEADERSHIP

Numerous recent surveys and additional analytical data repeatedly report a widespread lack of efficient internal communication between board members and executives. Barely half of nonprofit CEOs believe that their board members are truly aware of the challenges their organizations face. Moreover, most CEOs do not believe that their boards are using their own resources and knowledge to properly help the organizations address such challenges. In addition:

- CEOs portray nonprofit boards as frequently disengaged or ill-equipped to effectively support their new leaders. When it comes to managing the senior executive, nonprofit boards consistently underperform.
- Nearly half of the CEOs reported getting little or no help from their boards when first taking on the position.
- 55% of CEOs believe their boards do not use their resources and knowledge to help them address their challenges.
- Two-thirds of Board chairs do not believe that their board members are very experienced, based on the number of additional boards they serve on.
- 48% of Board Chairs do not believe that their fellow board members are very engaged in their work, based on the time they dedicate to their organization and their reliability in fulfilling their obligations.

4. LACK OF TRAINING

- **Board Chairs:** More than half of board chairs reported having done nothing specific to prepare for becoming chair, and many noted a significant lack of mentoring and peer networking to prepare them to serve in their roles.
- **CEOs:** 73% of nonprofit CEOs feel they lack sufficient resources and opportunities to develop their leadership skills. With more than 40% of respondents reporting that they have been in their position for ten years or longer, this is clearly not only an issue for leaders who are new to their roles.

5. LACK OF MOTIVATION AND SENSE OF PURPOSE

As opposed to the challenges cited above, there are instances when boards themselves feel discouraged and underused. Therefore, boards often function as little more than a collection of high-powered people engaged in low-level activities, while the organization gains no benefit from their talents. The major reasons for such challenge are:

- Lack of cooperation from the side of the CEO, who fears a strong board and refuses to share information, seeking the board's approval at the last moment (which stands in opposition to the above-mentioned concern by CEOs regarding the boards' disengagement).

- Lack of sufficient understanding of the work of the institution, when resource-scarce nonprofits feel pressure to only report good news to funders, and they instead collect data with poor fidelity or where outcomes and indicators do not match up to actual activities.
- Lack of personal accountability for individual board members, who feel little relevance between their input and the organization's mission or impact.
- Lack of teamwork among the powerful individuals who make up the board, and a consequent emergence of a "board within a board," where a subset of directors has an outsized influence on board decisions.

In sum, nonprofits need support from their boards to define their mission, develop leadership, grow and sustain resources, engage in outreach, improve products and services, establish critical monitoring and improvement systems, and build and maintain organizational infrastructure.

UNIQUE CHALLENGES PERTAINING TO THE JEWISH PHILANTHROPIC SECTOR IN THE U.S.

Most charitable giving within the Jewish philanthropic sector in the U.S falls into three distinct, yet related, program areas:

- Support Israeli organizations and pro-Israel causes
- Support Jewish communities around the world
- Support to Jewish-related domestic causes

Each of these spheres has its own development trajectory and challenges.

1. A SHIFT IN GIVING PRIORITIES TO PRO-ISRAEL CAUSES AND ISRAELI ORGANIZATIONS

During the period prior to the establishment of the State of Israel, and during the first four decades of the State's existence, American Jews provided vital financial assistance. Called upon by their local federations and the United Jewish Appeal to support Israel, American Jews donated generously and asked for little, if nothing in return.

While pro-Israel causes remain the significant recipients of charitable donations each year, there have been fewer new donors in this field as compared to other areas of interest within Jewish sectors of giving. Moreover, because the priorities of the newer generations of Jewish donors are much more varied, this ecosystem will alter dramatically when the current generation of prominent mega donors changes guard in the coming 5 to 10 years. Such phenomenon could result in an abrupt drop in the funds available for Israeli nonprofits.

Among the reasons for the shift are:

- No existential threat to Israel
- No personal experience related to the Holocaust by younger Jews
- Awareness issues/imbalance of pro-active Hasbara (pro-Israel education) vs. intense climate of BDS (especially on American college campuses)
- Declining engagement generally of young Jews in Jewish life and causes
- The stagnation of federations' annual campaigns, declining donor pool and the marked decrease in their allocations to Israel
- Community's relationship to Israeli politics and government (particularly the diversity of opinions regarding certain policies and decisions)

These factors combined jeopardize the loyalty to, and future philanthropic support of, Israel-related causes.

The reframing of key elements of the Israel narrative is necessary to ensure sustainability of Israeli nonprofits in the decades to come, and innovative and relevant training may help current and future board opportunities become more meaningful to a new generation of leaders.

2. A SHIFT IN GIVING TO JEWISH COMMUNITIES AROUND THE WORLD

Most philanthropic activity of North American Jews has been conducted through umbrella organizations, notably the Jewish Federations of North America and the American Jewish Joint Distribution Committee. At one point, 60%-70% of funds raised by Federations went to assist Jews outside of the United States.

While many Federations have continued to prioritize support for Israel, in recent years, assistance to the diaspora communities outside Israel has decreased. This reduction is primarily due to shrinking populations entitled to assistance under previous established programs, the perception of local economic growth and the accompanying development of local philanthropic activity.

American Jews do still support communities outside Israel, primarily in response to emergency situations or for the sake of ensuring the continued growth of a given population. Such examples include efforts to:

- Support to European Jewish communities facing brutal terror attacks and dealing with rising anti-Semitism
- Alleviate sufferings of Ukraine's Jews caused by the protracted conflict
- Provide planning and technical assistance to communities of Latin America and North Africa
- Preserve and disseminate material Jewish heritage and artifacts in the countries of Eastern Europe

Consequently, board members, especially those who work in international programming, must not only understand best practices and organizational health in the context of their own organization, but they must be equipped to culturally adapt such practices to better serve their respective beneficiary communities.

3. INCREASED CHALLENGES FOR JEWISH NONPROFIT

An extensive series of in-depth surveys clearly illustrate that American Jews are committed to charitable giving. They give at high rates to both Jewish and non-Jewish organizations. Moreover, the more connected American Jews are to Jewish social networks and Jewish communities, the more likely they are to give as a general matter.

At the same time, the data also provides reasons for concern regarding the future of giving to Jewish organizations. While there are many distinguishing characteristics of the Jewish sector, there are five major trends worth noting of which board members of Jewish nonprofits should be distinctly aware.

Globalization, Jewish Collective and Jewish Identity: Jewish philanthropic and nonprofit leaders face the increasingly difficult task of raising money in a new era of global connectivity, where charitable options and interests have grown exponentially. Simultaneously, American Jews' association with Jewish collectivity, and their own relationships with their Jewish identities, are more complex than ever before.

Polarization: While members of the American Jewish community have always expressed diverse opinions, and represented a broad range of views, there has historically been room for healthy debate and civil discourse. Unfortunately, as of late, room for opposing views and robust and meaningful conversation has slowly diminished.

While many anecdotally cite the Iran deal as the "straw that broke the camel's back," tensions between and among members of the Jewish community surrounding an array of issues had been on the rise well prior to that. As a community, they are struggling with vastly disparate views on a number of critical concerns, including most prevalently, how to frame the Israel narrative. As a consequence, instead of being focused on the work at hand, professionals and lay leaders spend valuable time and resources trying to traverse difficult topics and dynamics that may have absolutely nothing to do with their desired philanthropic impact.

Professional Development and Retention: Given this context, Jewish nonprofits need the best professionals to tackle existing and emerging challenges. However, the data highlights the sector's growing inability to attract potential talent and the failure to sufficiently develop and advance its current professionals. In addition, studies have clearly identified additional challenging elements of workplace culture in that also contribute to this talent acquisition and retention dilemma. Consequently, many experienced and valued professionals expect to leave the sector within the next five years. If such exit mass exist occurs, the sector as a whole will lose institutional knowledge, spend significant time onboarding new professionals who may be unfamiliar with the industry, and reinvest newly raised funds in what otherwise could have been considered sunk capital.

Increased Expectations of Organizational Sophistication: Philanthropists and philanthropic institutions making grants to Jewish nonprofits have become increasingly sophisticated. They are demanding more from organizations than ever before in order to maximize their social return on investment. Thus, boards need to anticipate donor expectations, and they need to understand the importance of concepts such as benchmarks, metrics, evaluation, donor diversification, financial regulation, and other pressing concerns of funders.

Role of Funders: In addition to funders' increased expectations of nonprofits, there is also an interesting tension between the actual role of the funder and the operation of nonprofit organizations. This relationship is often further complicated when the funder is also a board member or otherwise has a representative on the board. The dilemma has multiple facets and raises a number of difficult questions:

First, how much leverage should significant funders have on the programs or business of a nonprofit organization, especially if they are not members of the board? Second, as alluded to in a previous section, are there implicit issues regarding transparency of information when the board is comprised mostly of significant funders? Third, do professionals leverage significant funders in certain cases to either promote certain items on their own agenda, or in more egregious situations, usurp the authority vested in the board? There are no easy answers to these questions. However, board members must understand how to best traverse this inevitable dynamic.

Given the complexity of modern philanthropy, and the added nuances of working in the Jewish nonprofit sector, boards must have the comprehensive training and skills to act proactively and efficiently, maximize the impact of the organization, manage potential conflict and risks, leverage strategic partnerships and take advantage of current market trends.

Judaism does not accept the separation between an individual's actions as an economic agent and as a moral agent. The Jewish values that guide investing both encourage personal gains, and fulfill one's responsibilities as a steward of wealth. Investing out of a belief that our actions can influence both our individual and collective future, in a manner that is aligned with the Jewish ideal of a virtuous life and just society.

MAPPING OF TRAINING PROGRAMS FOR BOARD MEMBERS AND LAY LEADERS

Today there are a number of training programs for board members and lay leaders of nonprofits in the United States. (See References for a list of offerings reviewed).

Given the variety of the existing solutions, one may assume that the need for education and training is satisfied. However, while the current offerings address certain components and requisites of the field, given the scope and intensity of the challenges and trends previously outlined, the market may be ripe for additional alternatives.

In the following section, we discuss and categorize several of the more prominent current offerings to better understand whether and where opportunities for a different solution may exist.

ACADEMIC CERTIFICATION

While all active courses have been established by well-respected organizations, most do not provide for a certification by an accredited academic institution. While it is worthy to note that even those certificate programs administered by accredited institutions may not have academic standing, they are appealing to those seeking access to prestigious institutional/adjunct faculty or to bolster their own academic credentials.

CURRICULUM

The content of the current available curriculum can be generally categorized as follows:

- The curriculum is entirely secular in nature, and while it may touch on certain financial, strategic and other operational concerns, there is no specificity around how to navigate such issues pursuant to Jewish values or in the Jewish nonprofit context.
- The whole curriculum is infused with deep and profound Jewish learning, and while leadership, strategy and other highly relevant topics are indeed well-covered, the courses are taught entirely through a Jewish lens and with the overarching goal of increasing Jewish literacy and fluency.
- The curriculum is subject-matter restricted. While the course may be taught by both Jewish and secular experts, it is defined in scope (i.e. limited to one or two broader topics), and therefore inherently limited in its ability to provide a more comprehensive skillset.

DURATION AND FORMAT

Several courses currently offered are either online, short-term, or possibly a combination. While these programs can be convenient in terms of the availability of resources for further learning, minimal and flexible with respect to required time commitment, and they allow for the opportunity to fine tune or target a specific skill for improvement, they may not be as comprehensive or holistic as some may want or need. Moreover, given the limited duration and remote learning, there is no room for networking or group learning.

At the other end of the spectrum, there are courses that require extensive time commitments from their participants, in some cases one to two years. However, this greater exposure and duration does allow for the desired networking elements and ensures a broader educational experience. On the other hand, that greater time commitment may be otherwise prohibitive for many who could otherwise benefit.

AUDIENCE, ELIGIBILITY CRITERIA AND GEOGRAPHY

Age Limitation: Certain programs have age limitations which excludes “baby boomers” and many members of Generation X from participation. This then restricts possible beneficial interactions and mentoring opportunities between and among generations. Such communication opportunities could help to provide a forum to address the continuity and/or succession issue voiced by many in the field.

Experience Requirement: Some of the most impactful powerful programs require potential participants to have a deep prior involvement and investment in the Jewish sector, thus limiting the outreach for highly skilled potential participants with profound relevant experience from other fields. Moreover, while this curriculum is quite valuable for some, other leaders may want a different balance of secular and Jewish learning opportunities given their interests and commitments outside the world of the Jewish philanthropy.

Certain other programs target earlier career professionals that do not have any, or very limited board experience, in order to help train and place them at high-impact nonprofits. However, such programs do not currently have parallel offerings for existing nonprofit board members who may want to “train up.”

National/Local Considerations: The current offerings are primarily focused on a specific geography, with some exceptions. The focus on recruiting participants from a certain city or a specific region allows for even greater specificity and practical application of the curriculum.

However, it is important to note that even those that are more national in scope allow for in-person learning opportunities or retreats because they also realize the intangible benefit of cohort-based learning.

RECOMMENDATION

SOLUTION TO A GAP BETWEEN THE CURRENT NEEDS IN BOARD MEMBER AND LAY LEADERSHIP TRAINING AND EXISTING OFFERINGS.

Based on both the analysis of the current available data, as well as the assessment of current offerings in the field, we recommend the creation of a medium-length (5-7 months, approximately 12 modules of varied length), highly practical, holistic training program open to active and potential board members, without age or specific experience restrictions, that would address the societal challenges and internal needs of boards. The curriculum would be created and address the new trends and opportunities in the field. This is a much needed program that does not exist today. It would enable participants to quickly grasp structured information, skills, tools and efficient know-how to advance their organizations' missions and maximize their desired long-term programmatic impact.

The program design should effectively leverage new educational technologies and opportunities in a way that is attractive to its potential participants in terms of format, pedagogy, timing, and environment.

PRODUCT OUTLINE

While the actual product still needs to be developed, at this juncture we believe it should contain the following elements³:

1. A rigorous and comprehensive curriculum delivered by a prestigious academic institution, which would then deliver a certification. The curriculum should address:
 - a. Board member roles and responsibilities
 - b. Financial regulations responsibilities and fiscal issues
 - c. Strategic and organizational management
 - d. Capacity building (i.e. resource development and other necessary infrastructure concerns)
2. Partnership with either a renowned Jewish educator and/or a seasoned practitioner, or with a Jewish educational institution, who can infuse the secular curriculum with the requisite knowledge to maximize impact within a Jewish nonprofit framework.
3. Local and/or organizational cohort-based learning model which allows both peer learning and cross sector and cross generational educational and networking opportunities.
4. The classes and lectures should be conducted only by top academics and/or practitioners in the field, controlling for quality instruction and facilitation, to ensure excellence and maximize the value propositions of participation in the program.

³ In addition to the elements below, based on initial stakeholder feedback, we may consider adding a mentoring/coaching component to the program. There are a variety of ways that this can be structured, and depending on the implementation, this could add a meaningful line item to the budget. We will explore this topic further in the stakeholder assessments.

CONCLUSION

The job of boards is to guide, govern and steward nonprofit organizations. Therefore, substantial attention to the recruitment and development of board members is critical.

The ultimate goal of this particular assessment was to help determine whether to bring a comprehensive, professionally prepared and administered program to the market that proactively addresses this growing priority. We contend that comprehensive and intentional board member training should become a widely used and sought after resource for every potential board member.

At the core of a healthy nonprofit organization is a strong lay-professional partnership. When boards and professionals are in sync, complementing each other's efforts, the human and investment capital of the entire organization is better-leveraged. Funders and organizations are just beginning to better and collaboratively deploy resources to recruit, train and retain its professional staff. We strongly recommend that the field seriously explore the need to make similar investments in its boards and lay leaders.

While the community has been able to function thus far without such serious organizational introspection, this may soon be a luxury that Jewish nonprofits may no longer be able to afford, and which increasingly sophisticated and result-oriented donors may no longer tolerate. Organizations who are not proactive in this area risk underperformance at best, and possible failure at worst. Organizations who are ahead of the curve, and who recognize the need for highly skilled and effective board members, will not only increase their chances for survival, but will give themselves the opportunity to thrive.

APPENDIX A

For purposes of this field assessment, we analyzed the following current training and/or educational programs for nonprofit board members and lay leaders in the United States. We reviewed programs targeted at both the secular and the Jewish sectors.

The programs on this list were primarily evaluated using open source information. Consequently, it may not include existing programs that are not publicized online and/or have not publicly announced new enrollments for 2017.

The programs are listed in alphabetic order as per the founding organization.

CURRENTLY ACTIVE (NEW ENROLLMENTS ARE OPEN FOR 2017)

	Organization	Training Program
1	Boardsource	Leadership Certificate for Nonprofit Board Education
2	Cause Strategy Partners	BoardLead
3	Charles and Lynn Schusterman Family Foundation	Schusterman Fellowship
4	DePaul: College of Liberal Arts and Social Science	Nonprofit Management (MNM)
5	Indiana University: Lilly Family School of Philanthropy	Nonprofit Executive Leadership
6	Kellogg School of Management at Northwestern University, Center for Nonprofit Management	Executive Nonprofit Management and Leadership Programs
7	Pardes	Pardes Executive Learning Seminars
8	Shalom Hartman Institute of North America	Community Leadership Program Summer Retreat (CLP)
9	Spertus Institute	Center for Jewish Leadership
10	University of Chicago: Booth School of Business	On Board
11	Wexner Foundation	The Wexner Heritage Program

Currently on-hold (no public information about new enrollments open for 2017)

	Organization	Training Program
1	BGI: Brandeis Genesis Institute	Brandeis Jewish Leadership Incubator
2	Legacy Heritage Fund	Onboard program - Legacy Heritage Fellowship
3	The Mayberg Foundation	Center for Jewish Education and Leadership

REFERENCES

11 Philanthropic Trends for 2017; by Dorothy A. Johnson Center for Philanthropy, 2016

Bar Nissim, H. S., Changing Strategy and Practices of Diaspora Philanthropies Towards Israel; by E-International Relations (online), March, 2016

Benhorin, Y.: World of American Donations to the Jewish State Revolutionized; by Ynet News (online), February, 2015

Buteau, E., Ph.D., Brock, A., Chaffin, M.: Nonprofit Challenges: What Foundations Can Do; by The Center for Effective Philanthropy, 2013

Call to Action: How Lay Leaders Can Overcome the Jewish Community's Leadership Pipeline Challenge; by Leading Edge; Survey (pre-released version). February 2017

De Vita, C. J., Fleming, C.: Building Capacity in Nonprofit Organizations; by The Urban Institute, 2001

Freiwirth, J., Hiland, M., Burns, M., Gifford, G., & Beck, D.: Voices of Board Chairs: A National Study on the Perspectives of Nonprofit Board Chairs; by Alliance for Nonprofit Management, New York, 2016

Gerstein, J., Cohen, S. M., Landres, J. S.: Connected to Give: Key Findings from the National Study of American Jewish Giving; by Jumpstart, Los Angeles, 2013

Gerstein, J., Landres, J. S.: Connected to Give: Jewish Legacies; by Jumpstart. Los Angeles, 2013

JDC on the Front Lines. Annual Report, 2016

Larcker, D. F., Donatiello, N., Meehan III, W.F., Tayn, B.: 2015 Survey on Board of Directors of Nonprofit Organizations; by Stanford Graduate School of Business and the Rock Center for Corporate Governance, April, 2015

Linde, S.: The Challenges Facing American Jewry; by The Jerusalem Post, November, 2016

Non-Profit Sector Leadership Report 2016; by Concord Leadership Group, 2016

Norris, P.: The Global Generation: Cohort Support for European Governance; by John F. Kennedy School of Government Harvard University, February, 2004

Norris, S.: 80 Nonprofit Trends for 2016; by Non-Profit PRO (online); February, 2016

Ryan, W.P.: Governance as Leadership: Reframing the Work of the Nonprofit Board; by The Pew Fund for Health and Human Services; Seminar Summary; October, 2007

Sinclair, C., Dr.: Dramatic Demographic Changes Impact Nonprofits; by Nonprofit Kinect; May, 2014

Wolf Ditzkoff, S., Landles-Cobb, L.: Leadership Pipelines Initiative: Cultivating the Next Generation of Leaders for Jewish Nonprofits; by Bridgespan Group. Findings from Interviews and Research, Mar. 2014