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PHILANTHROPIC SOLUTIONS

EXECUTIVE SUMMARY

KEY FINDINGS OF THE
LAY LEADERSHIP TRAINING SURVEY
FOR NONPROFIT LEADERS

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

EXECUTIVE SUMMARY: KEY FINDINGS OF THE LAY LEADERSHIP TRAINING SURVEY FOR NONPROFIT LEADERS

“Be the change that you wish to see in the world.”
Mahatma Gandhi

BACKGROUND

Recent studies and literature in the field clearly indicate that board members of nonprofits in the U.S. lack the requisite training and practical skills to handle the challenges of the evolving nonprofit landscape. While the problem has been acknowledged, both formally and anecdotally in the Jewish nonprofit sector, attention to this dilemma has not been a funding or programmatic priority of organizations as a whole.

The Jack and Goldie Wolfe Miller Fund, a fund of Jack Miller Family Foundation, endeavors to maximize the impact of its grant-making by concentrating its support where it can be most effective and leveraged. Consequently, seeing an opportunity to invest in elevating the overall performance of the Jewish nonprofit sector, the JGWMF decided to look at the prospect of **developing and launching a comprehensive and intentional board member training program, with the aspiration of it becoming a widely sought after and utilized resource for current and potential board members across the U.S.**

To begin its diligence, the Jack and Goldie Wolfe Miller Fund first engaged the Marom Group¹ to conduct a qualitative field assessment of current trends of the Jewish nonprofit sector in the U.S., with the following goals: (1) to analyze the climate and the needs of the Jewish nonprofit sector in the U.S., especially as they pertain to the development of its lay leadership, and (2) to survey the available educational and training opportunities for current and future board members of these entities to determine whether there are sufficient options to prepare such leaders.

The results and key findings of this research are presented in the Assessment of Lay Leadership in the Jewish Nonprofit Sector: Challenges and Opportunities in Board Member Development. The key findings of the assessment are as follows:

1. The nonprofit sector in the United States is currently in a state of flux. Generational change, rapid technological progress, a growing need for cross-sector collaboration, and internal capacity challenges are shifting the paradigm of the sector. 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 who possess 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 to organizations, ranging from globalization and polarization, to professional development and talent retention.
2. Organizations who are not proactive in preparing themselves for the consequences of these trends risk underperformance at best and possible failure at worst. It is the board's job to guide, govern and steward nonprofit organizations. Therefore, substantial attention to the recruitment and development of board members is critical. Organizations who are ahead of the curve and recognize the need for highly skilled and effective board members, will not only increase their chances for survival, but they will give themselves the opportunity to thrive.
3. 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 have specific eligibility criteria.

The Assessment concluded that the **market is ripe for a high quality, practical, holistic training program that prepares board members for the entire scope of their responsibilities. Such training should be open to active and potential board members of Jewish nonprofits without the barriers to entry that exist in the current offerings.**

In order to further test these findings and recommendations, the Marom Group subsequently circulated surveys to 312 individuals who are actively involved in the Jewish nonprofit sector in the United States. The Marom Group asked donors/funders, lay leaders, foundation professionals and executives of leading U.S. Jewish nonprofits a variety of questions in order to understand their opinions on the urgency and need for a comprehensive board member training initiative. The survey also included questions regarding the composition, structure and curriculum of such a program. In addition, individuals were asked about their own willingness to participate in a program as either a participant or a potential strategic partner.

¹ Since 2009, the Marom Group has offered tailored, full-service, philanthropic solutions to individuals, foundations, corporations and governments. They 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 primary purpose of the survey was to collect valuable insights of decision-makers in the sector and incorporate them into the program design and implementation. The overall goal of the project is to create a dynamic and informed solution to a gap in the field between the current needs in board member and lay leadership training and existing offerings.

In order to increase the relevance of the survey questions to the respondents, three separate and distinct questionnaires were developed for and dispersed to the following audiences:

1. **Potential Participants:** Experienced individuals, who currently serve on one or more boards of various U.S. Jewish nonprofits and therefore belong to the direct target group of the project. Their insights provide objective feedback regarding the overall importance and relevance of the program, the significance of its curriculum design, scheduling preferences and other critical issues.
2. **Strategic Partners:** Philanthropists, lay leaders and/or foundation professionals who see the importance of the initiative to advance the mission and enhance operation of their own organization or of the nonprofits they support. Therefore, they may consider participating in the project as a funding or thought partner with varying levels of involvement. The foundation professionals who are not lay leaders themselves were requested to answer the questions as the representatives of their respective foundations, and expressed not just personal opinions, but their answers also were informed by their institutional guiding principles and values.
3. **Executives:** Top professional leadership (CEOs) and other senior executives of leading U.S. Jewish nonprofits who possess extensive hands-on experience in working with their own boards to reach their organizational goals. Their feedback was critical to understanding the complex dynamic of the relationship between the board and the professional staff. Moreover, they could express their desired adjustments to and improvements of overall board operation.

Collectively, representatives of all three categories are referred to as “the respondents” or “the stakeholders,” depending on context.

GOALS

While the scope of the survey was broader, we identified six key goals for closer study that would enable us to make a conscious and responsible conclusion with regard to the preferences of the urgency and relevance of the initiative for the stakeholders, as well as the overall readiness of the respondents to join the initiative as a participant or a partner. Moreover, the survey results allow us to understand the stakeholders' perception concerning the "high quality, practical, holistic training program," and outline it respectively, taking into consideration the actual voices of the field.

GOAL #1:

To assess the urgency of a comprehensive board member training program for Jewish nonprofits and understand the challenges a program must address.

Key Finding: Respondents of all categories indicated an urgent need for the training, with overwhelming enthusiasm from the side of Potential Participants and Executives (90.9% and 87.2%, respectively marked the initiative as Important and Highly Important). The proposition also received strong support from Strategic Partners (71.5%). See [Figure 1](#).

Key Finding: An absolute majority of the respondents see the lack of clear evaluation processes boards, and the lack of training aimed to maximize board members' current skills and build new ones, as the most challenging issues facing boards of Jewish nonprofits in the U.S. Lack of formal governance structure came in as the third most pressing issue. See [Figure 2](#).

Other board challenges respondents identified include: board development, role of the board, fundraising, interaction with professionals, understanding of vision, accountability of the organization, and conflicting priorities and personal qualities of the board members. See [Addendum 2](#) for the full list of challenges of the Board members and Executives that affect the organization's performance.

GOAL #2:

To assess the level of performance of active board members, via self-evaluation and through the eyes of other key players in the nonprofit sector (lay leaders and professionals) according to four major criteria:

- Understanding of their role and functions as board members
- Academic knowledge/intentional training in board service
- Practical skills to serve on the board with confidence and high efficiency
- Awareness of modern trends in the nonprofit world beyond operation of the organization

Key Finding: The Potential Participants tend to overestimate their own performance as board members, as compared to the perception of the Strategic Partners and Executives. However, the Potential Participants do acknowledge the need for an intentional training in board service. See [Figure 3a](#) and [Figure 3b](#).

Key Finding: There is an evident discrepancy in the assessment of **cooperation from executive leadership** as a challenge for boards through the lens of respondents of various categories. Only 20% of Executives see it as a challenge, as opposed to 42.9% of Strategic Partners and 36.4% of Potential Participants. See [Figure 2](#).

GOAL #3:

To understand the willingness of the key players to take part in the training course themselves and analyze their expectations of potential participation.

Key Finding: The majority of Strategic Partners and Executives are willing to join a board training course (or certain relevant sections) along with the board members of the nonprofits they support or at which they work. See [Figure 4](#).

Key Finding: The majority of respondents expect the training would help to:

- Increase the level of their communication and cooperation with the board and executive leadership of the organization(s) with which they are involved
- Better define the strategy and fine-tune the operational processes of their respective nonprofits
- Stay "on the same page" with regard to the understanding of current trends
- Implement sector best practices

See [Figure 5 \(pp. 1-5\)](#).

Key Finding: An absolute majority of respondents of all categories believe there is room for improvement in their nonprofit operation and are willing to commit to a comprehensive training, despite their already existing time limitations. [Figure 5 \(pp. 6-7\).](#)

GOAL #4:

To understand the factors that may influence the ability of interested individuals to take part in board training.

The respondents were asked to assess the importance of the following factors as: Highly Important / Somewhat important / Not important.

- Curriculum developed and delivered by a prestigious business school with expertise in nonprofit education
- Highly practical holistic curriculum
- Customized modules to better reflect the needs of the participants
- Expert track sessions by experienced practitioners
- Networking opportunities with influential peers
- Convenient schedule
- Opportunity for personal development
- Applicability of content and skills in the for-profit sector
- Academic certification
- Informal mentoring

Key Finding: The convenience of the schedule is the critical factor that might influence the decision of the absolute majority of the respondents to join a board training course.

Key Finding: The majority of respondents would appreciate a highly practical, holistic curriculum delivered by expert practitioners, with customized modules that reflect the specific needs of the participants. A significant share of respondents appreciate and value the exposure to experienced practitioners, welcome networking opportunities with influential peers, and seek opportunities for personal development.

Key Finding: Surprisingly, just a handful of respondents regard academic certification and informal mentoring as important factors in their decision-making process.

See [Figure 6](#) for the detailed breakdown of the survey results.

GOAL #5

To understand the relevance and importance of the topics and subjects that must be addressed in the curriculum in order to maximize the efficacy and impact of the training.

In order to help inform the design of the curriculum, the respondents were asked to assess the relevance of the following broad subjects, with a number of specific topics in each, using the following importance rank: Mandatory / Essential / Desired / Moderate / Irrelevant.

- Introduction to the Nonprofit Sector
- Board Development and Management
- Financial and Legal Issues in the Nonprofit Sector
- Resource Development & HR
- Marketing & New Technologies
- Strategic Management
- Measuring Impact
- Customized Module: Challenges and Opportunities of Jewish Nonprofits in the U.S.

Key Finding: Participants of all categories highly regard practical subject matters, such as board development ([Figure 7b](#)), financial and legal issues in the nonprofit sector ([Figure 7c](#)), resource development and HR ([Figure 7d](#)), as well as measuring impact ([Figure 7g](#)).

Key Finding: Generally low interest in the Introduction to the Nonprofit Sector (Figure 7a) shows the perceived expertise of the respondents in the field. Still, almost half of the Potential Participants and Executives recognize the significance of:

- Philanthropy and the Role of Nonprofit Organizations
- Nonprofit Trends: the U.S. Perspective
- Roles and Responsibilities of the Board and its Members
- Board Management Skills

Key Finding: It is noteworthy that trending topics such as Impact Investing, Crowdfunding, Giving Circles, Leveraging of New Technologies and Social Media, Cross-Sector Collaboration, Corporate Social Responsibility are valued relatively low by all categories of respondents. A possible explanation might be the lack of the awareness about the significance and applicability of these trends in the sector, which shall be one of the topics the training course will address..

Key Finding: For the absolute majority of respondents it is essential that the course address the specific needs of Jewish nonprofits, via specific cases, learnings and/or are taught by practitioners from the Jewish nonprofit sector and/or the separate modules with customized Jewish content.

[Addendum 4](#) provides the list of the most relevant study subjects, considered as Mandatory or Essential by majority of the respondents of all categories. See the Series of [Figure 7](#) for the detailed breakdown of the overall survey results.

Goal #6

To assess the potential and most appropriate formats for strategic partnerships within this initiative.

The questionnaire for the Strategic Partner contained a set of questions regarding preferred partnership options. The respondents were asked to assess the option as Highly Likely / Somewhat Likely / Not Likely.

- Strategic support to program (unrestricted)
- Open Scholarships for participants
- Scholarships for participants from organizations that operate in the field of my/our interests
- Scholarships for participants from organizations that operate in certain geographic area
- Scholarships for participants from organizations I/we support and/or their partners
- Scholarships for participants from organizations I/we support only
- In-kind Contribution (administrative/informational support)
- Contribution to the Curriculum Development, Evaluation, Additional Research and Development

Key Finding: The most appealing forms of partnership for potential funders are unrestricted strategic support and contribution to the curriculum development, evaluation and additional research and development.

Key Finding: The only type of scholarship the partners are likely to provide are scholarships for participants from the organizations the Strategic Partner already supports. Otherwise, scholarships for the participants are less likely than other forms of support.

See [Figure 8](#) for the detailed breakdown of the survey results.

Credibility Statement:

Within the specified timeframe, 75 respondents (or 24% of the total number of the 312 dispersed surveys) submitted their responses, which is sufficient to endow the credibility to the findings. All data and percent ratios provided below were calculated based on the actual number of respondents:

Type of respondent	Total number of respondents	%
Strategic Partners	14	100%
Executives	39	100%
Potential Participants	22	100%
Total	75	100%

Field of Interests

Jewish Identity & Peoplehood and **Jewish Community Building** programs are the top priorities for respondents of all categories, followed by **Israel** and **Israel Education and Advocacy** programs. At the same time, the survey reflects opinions of the lay leaders and professionals involved in a much broader range of activities, which renders the survey results credibility as they are relevant to representatives of the entire sector, rather than one specific segment. See Figure 9 for the program areas/funding priorities of the respondents.

Leadership Experience and Commitment to the Cause

The vast majority of representatives from all categories possess extensive experience in the Jewish nonprofit world in their respective capacities as board members or Executives, and show deep personal commitment to work in this field, driven by value-based incentives rather than pragmatic considerations.

- **90.9% of Potential Participants have over 5 years of experience serving on the boards of Jewish nonprofits.** 18.2% have cumulative Board service experience of 10-25 years. Almost half of the respondents (45.5%) are senior board members with experience of 25 and more years. See [Figure 10a](#).
- **69.3% of Strategic Partners** personally serve on boards. **76.9%** of Strategic Partners have been involved in Jewish Philanthropy for over 5 years. **23.1%** have over 10 years of experience with Jewish philanthropy. **15.4%** have greater than 25 years of experience. See [Figure 10b](#).
- **86.8% of Executives** have over 5 years of experience with Jewish Nonprofits as a whole. **57.9%** have served as an Executive for their current organizations for over 5 years. See [Figure 10c](#).

The survey took a deeper look into the incentives for involvement into philanthropic activity / serving as an Executive of Nonprofit, and suggested to assess the following pre-set options as Highly Important / Important / Somewhat Important / Not Important / Not Relevant:

- To contribute and make an impact to society
- To live in line with my Jewish values
- To follow the family tradition
- To fulfill my internal urge for volunteering
- To advance my professional interests
- To make personal connections
- To advance my personal interests

See [Figure 11a](#) and [Figure 11b](#) provide for detailed breakdown of incentives and the level of their importance for the respondents.

Also, the survey provided an option for respondents to express what draws them to their work beyond the suggested pre-set options. More than any other reason, respondents mentioned that they worked in this field to advance and protect the interests and values of the Jewish people. Even those who mentioned that they did what they do to hold a leadership position or because of personal commitments, it was still in the context of promoting Jewish life. See [Addendum 1](#) for the full list of the motives and incentives of the respondents regarding their philanthropic activity or aspirations to maintain their leadership roles in the nonprofit field.

Addendum 1. Credibility Statement

Major motives and incentives for involvement to the philanthropic activity / aspiring leadership role in the nonprofit field.

For the purposes hereof only direct quotes are provided, original grammar and spelling are maintained. The only exception is the titles of the organizations, mentioned by the respondents, to honor the anonymity of the responses. Such titles were replaced with "My organization."

Strategic Partners' incentives are of more introspective nature:

- I am a philanthropy professional. I have strong feelings about being a Jewish professional (distinct from being a professional at a Jewish organization)
- To understand philanthropy's unique role in society.

Executives and Potential Participants have more hands-on practical motives for engagement in philanthropic activity or holding Executive positions that can be categorized as follows (per frequency of appearance):

Vision regarding Jewish Future

- To strengthen the Jewish people and to perpetuate the values we bring to the world.
- To make an impact on the direction of Jewish peoplehood as well as serve their health and human services needs
- I care deeply about Israel's place in the world and the future of the Jewish people worldwide.
- Deep concern over the future for our children and grandchildren;
- To help cultivate the future Jewish leadership in the world.

Values & Beliefs

- It is the "Right" thing to do.
- It's not my money - it's gods
- Setting examples for my family and most importantly identifying my universe of obligation and demonstrating the importance of a collective, shared society for Jewish continuity
- To learn something new. To meet other people with the same interests and values.

Leadership Position

- To play a leadership role in a cause that I feel passionately about
- To guide the strategy for a Jewish nonprofit that serves the broader community; deepening an understanding of the relevance and importance of being a Jewish agency in "how" and "why" we provide service rather than our Jewishness defining "who" we serve.
- To lead in areas of change management.
- Leadership and believing in what I do

Personal Dedication

- I am a co-founder of the organization, so I got into the work to bring to bear the vision I care about
- My life long dedication to my organization
- Purpose
- My organization is a community that has held an important place in my own heart for many years prior to joining the organization as an executive. I've been involved since *my organization* was meeting mostly in living rooms and have witnessed firsthand the exciting and exponential growth of this spiritual community and the many lives it has touched over the course of 5+ years. I've always been interested in Judaism and innovation, and I see *my organization* as an organization that is doing the cutting-edge and vitally important work of reinventing what Jewish communities can look and feel like in the 21st century. I wanted to be part of that work, bringing Judaism to the people in a very relevant and compelling way, and I knew that joining *Nonprofit A* as it made the leap from start-up to mezzanine organization would be challenging, interesting and rewarding. It's very important to me that my work contain these qualities and that there are always new challenges to face and overcome--otherwise I think I'd get bored.

Give and Share

- Bring skills from private industry to the Jewish communal field
- Pay forward to the next generation
- access to quality education regardless of your family's wealth
- I feel the need to give back since I have led a fortunate life.

Commitment

- My organization was in dire need of someone with my skills and expertise. It felt like a "calling" to say yes.
- I felt that there was a real need in the Jewish community....
- Be responsive to admired friend's inquiry
- I was committed to the mission, and had a relationship with the organization founder.

Pragmatic

- I was asked and qualified at the time
- Peer Pressure

Noteworthy: One-third (33%) of respondents shared their opinions with regard to their incentives for the involvement in the philanthropic/nonprofit activity. While these comments covered a wide range of aspects, just 8% of the comments (or 3% of the total number of respondents) indicated they were driven by purely pragmatic motives, like peer-pressure or technical qualification for the position, rather than their vision for the Jewish future, values, leadership potential, opportunities to give, personal dedication and commitment to the cause.

Addendum 2. Challenges of the board members and Executives that affect the organization's performance

The survey provided an option for respondents to express their opinion with regards to the challenges beyond suggested options.

For the purposes hereof only direct quotes are provided, original grammar and spelling are maintained. The only exception is the titles of the organizations, mentioned by the respondents, to honor the anonymity of the responses. Such titles were replaced with "My organization."

Almost half (40%) of respondents provided additional comments on the challenges they experience while serving on the board or interacting with the board members of their respective organizations. Of all feedback received, only 10% of comments (or 4% of the total number of respondents) indicated they are fully satisfied with their boards' operations.

The comments from all respondents covered a broad range of issues, most of which fall into the following categories (listed by frequency of appearance):

Board Role and Board Development

- Understanding the life cycle of the board, including governance, strategy and tactics.
- Building a cohesive, connected, national board of individuals who infrequently interact in person.
- The challenge is in recruiting new, highly capable board members.
- My board members understand that their responsibilities are mostly strategic and financial ones. However, there seems to be a gap between that understanding and the work the board does on a daily/weekly/monthly basis. They seem to very much be waiting for their cues from the management-level staff, rather than being proactive. There's a kind of passivity there. They also have very few skills in the area of fundraising and it's been a slow and ongoing process to get them to focus on that. As we have no full-time development staff (development responsibilities are handled between me and Rabbi), it is vital that our board be engaged around fundraising, especially when we are still in growth mode.
- Board generally focuses too much on execution issues pertaining to their perceived fiduciary responsibility (while I believe execution should be handled by management) rather than strategic and generative work. In other words, too much focus on "oversight" rather than foresight and insight.
- Overall accountability for roles assumed willingly as lay leaders
- Balancing time and geographic spread. Lots of committees to get the work done.
- Comfort with and energy for the role I need them to play in growing organizational resources.
- They are a board that is highly engaged, but not a culture of work associated with that. Also being an ambassador is limited because they have a hard time speaking about the organization (which doesn't lend itself to easy elevator pitches)
- Succession planning, building a stronger bench of board members, keeping the entire board engaged and focused on productive work.
- Too many organizations after the same leaders and not sufficient time to do the best job

Need for the Training

- In general we have a good board; but we'd like to strengthen board training in all respects.
- Continuing to work on developing articulate ambassadors, exceptional leaders, dynamic interlocutors and generous donors as our board members and most senior lay leaders.
- Since as a regional director I am not at all Board meetings I am answering to the best of my knowledge for our organization. from the work I do with early stage Jewish organizations I know that numerous boards, as well as the founders and directors, could benefit from A LOT of intensive board training. They want to help but many do not know how to be an effective board member. We support the organizations with board governance issues. A comprehensive training course would be wonderful!
- In the last four years, our organization has worked very hard to train and educate our board members in areas of programs, governance, fiduciary responsibilities and development.
- The skill sets of others

Fundraising

- Willingness/ability to do fundraising
- Development, Professional Talent Management
- Understanding of the necessity to give unrestricted when serving on the board.

Interaction with professionals

- Understanding and skill in how to work with professionals.
- The top lay leaders do not recognize that their primary role is to ensure the success of the CEO. Rather, they believe it is the goal of the CEO to ensure their success in their two year stint at Board Chair/Campaign Chair.
- disappointment in communication between board members and professionals, disappointment in communicating shifts in strategic priorities in a timely way, too often being reactive rather than proactive to challenges
- not great cooperation between lay leaders and professionals; challenge getting people involved in meaningful way; challenge when certain people run board meetings...

Personal qualities

- Humility (many think they know more than they do and are not willing to be open to either admit or learn outside their comfort zone), their own Jewish experiences serve as their lens to the community (in a community which usually looks and acts differently from the board member's experience), lack of willingness to push major donors to give more (someone else should do it), and trust in the professionals (it is much easier to get involved in day to day operations instead of focus on the tougher work of fundraising and community building).
- Many are in it for the glory and prestige

Vision

- Lack of big picture philosophy for the Board
- I think where we need to improve is on self-evaluation and strategic vision for the field where we are doing our work

Operational

- micro management for some board members
- effective engagement, meaningful participation, satisfaction with experience

Accountability of the Organization

- I interpreted the 3rd question above about evaluating the board. What about evaluating the organization? Boards need to understand logic models/theories of change and hold organizations accountable for specific outcomes. It shouldn't be about their personal interest.

Conflicting Priorities

- Conflicting priorities with local institutions vs. national organizations

Positive Feedback

- Strong Board of Trustees, very successful congregation.
- Compared to the FOR PROFIT boards that i also sit on... i have no issues
- It depends on the Board - I serve on many

Addendum 3. Factors identified by respondents as influences on whether to participate, many of which are consistent with the offered answers.

For the purposes hereof only direct quotes are provided, original grammar and spelling are maintained. The only exception is the titles of the organizations, mentioned by the respondents, to honor the anonymity of the responses. Such titles were replaced with "My organization."

Time / Cost / Location

- Overall time commitment to the course and whether the course will solve, in a practical, real-life way, the challenges facing our board/organization
- Will this be a three-day intensive type of program or a series with meetings 3 or 4 times over one or two years?
- My ability to be "away" from work (how long is it, how often, etc.)
- Time expectations
- Time, quality, board support, cost
- Cost
- Cost, location
- Cost to take this course.
- Time/money
- Timing and Cost

Quality and Relevance

- The quality of the curriculum is most important.
- It would be important to understand the overall philosophy about Board role, composition and functions to make sure that the course advances our work in these critical areas and doesn't further confuse role definition and function. I am concerned that some of the surveyed topics for the course are too operational and may blur lines of Board oversight of management functions. I would suggest Bill Ryan's book, *Governance as Leadership: Reframing the Work of Nonprofit Boards* (Wiley and Sons) as an excellent mental model for this type of curriculum.
- Quality of expectations
- It would have to be extremely relevant to the space I work in and for the type of organization (private family foundation) that I work for. I do not believe my board members would participate in such a program. However, the next generation is required to attend one philanthropic conference in order to be eligible for the Board of Directors. I could see junior board member participation in a course like this being a possible fulfillment of that requirement.

Raising Profile

- I want to be seen as a valuable member of the sector. It would be good to leaven the educational and service aspects with celebration and thanks for the work of volunteers for the community. I sometimes feel like I'm laboring in the corner, and no one in the community knows (or cares) how much I'm putting into this.
- It would help me as a professional and as a lay leader.

Networking

- if the other students have experience - should group by interest and experience.

Partnership

- We do offer board training but would welcome the opportunity to coordinate our efforts with our executive staff.

Addendum 4. The Curriculum Relevance Overview

The charts below provide the list of the most relevant study subjects, considered as Mandatory or Essential by the majority of the respondents of all categories. See the Series of [Figure 7](#) for the detailed breakdown of the survey results.

Board	Strategic Partners	Executives	Potential Participants
Roles and Responsibilities of the Board and its Members	64.3%	71.8%	77.3%
Board Building and Recruitment of Board Members	71.4%	69.2%	81.8%
Board Management Skills	71.4%	59.0%	72.7%
Effective CEO / Board Partnership	78.6%	89.7%	81.8%
Roadmap for Effective and Efficient Board Meetings	71.4%	64.1%	81.8%

Financial and Legal Issues in the Nonprofit Sector	Strategic Partners	Executives	Potential Participants
Legal Regulations for Nonprofits	71.4%	35.9%	68.2%
Financial & Audit Issues	71.4%	43.6%	77.3%

Resource Development & HR	Strategic Partners	Executives	Potential Participants
Overview of Capacity Building	57.1%	46.2%	59.1%
Resource Development: Work with Foundations, Individuals and Corporations	57.1%	61.5%	59.1%
Creation of the Annual Development Plan	35.7%	51.3%	77.3%
Leadership Succession	71.4%	56.4%	86.4%
Talent Attraction and Retention	64.3%	61.5%	86.4%
Best Practices in the area(s) in which my organization works	78.6%	43.6%	81.8%

Marketing & New Technologies	Strategic Partners	Executives	Potential Participants
Marketing for Nonprofits: PR, Branding & Positioning	21.4%	56.4%	50.0%
Work with Media: Control the Narrative	21.4%	59.1%	59.1%

Strategic Management	Strategic Partners	Executives	Potential Participants
Strategic Management	50.0%	66.7%	77.3%
Strategic Partnership Creation	28.6%	43.6%	59.1%
Workplace Culture	35.7%	41.0%	63.6%

Measuring Impact	Strategic Partners	Executives	Potential Participants
Strategies and Tactics to Maximize Impact	64.3%	59.0%	77.3%
Evaluation and Practical Tools for Measuring Impact	78.6%	48.7%	81.8%

**List of Figures for the Executive Summary:
Key Findings of the Lay Leadership Training Survey for Nonprofit Leaders**

Figure 1. Urgency of the comprehensive board member training program for Jewish Nonprofits

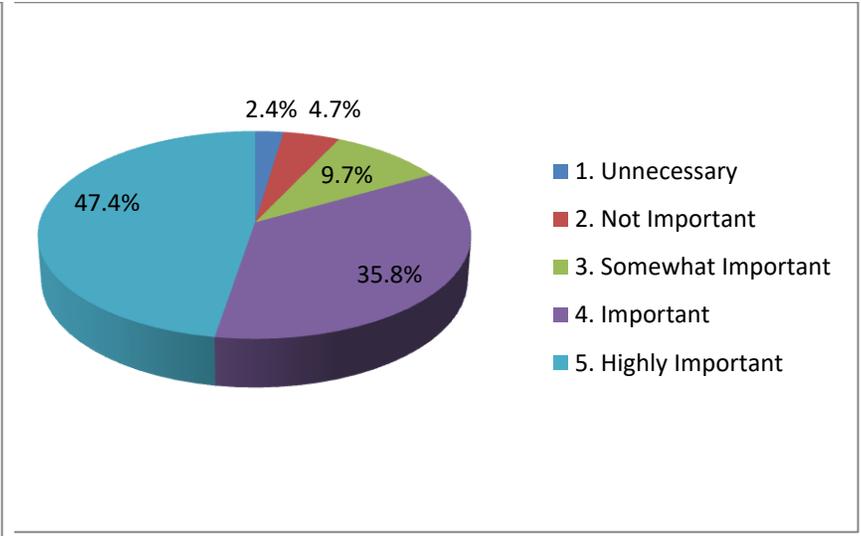
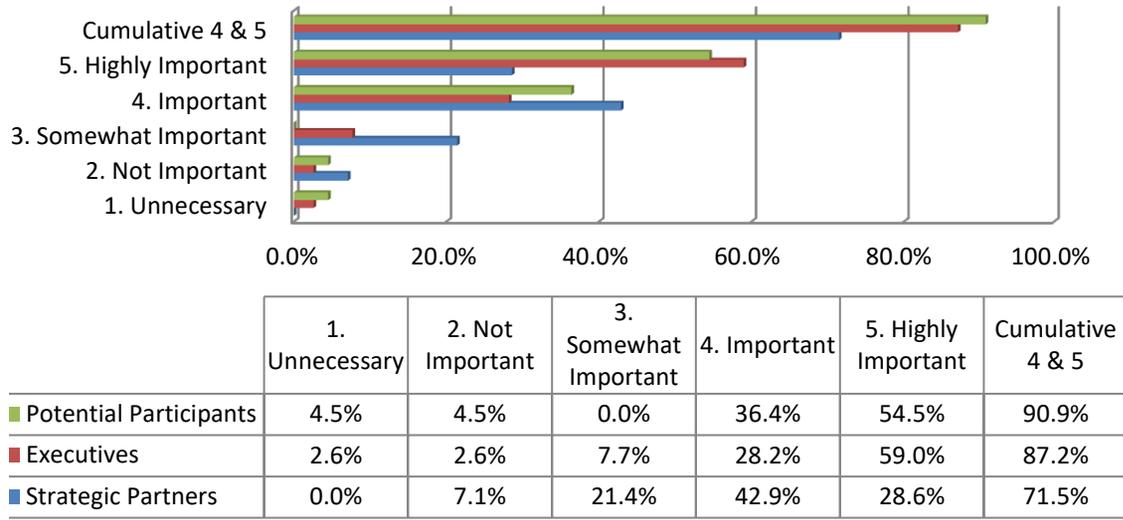


Figure 2. Challenging and Extremely Challenging Issues for Boards of Jewish Nonprofits in the U.S.

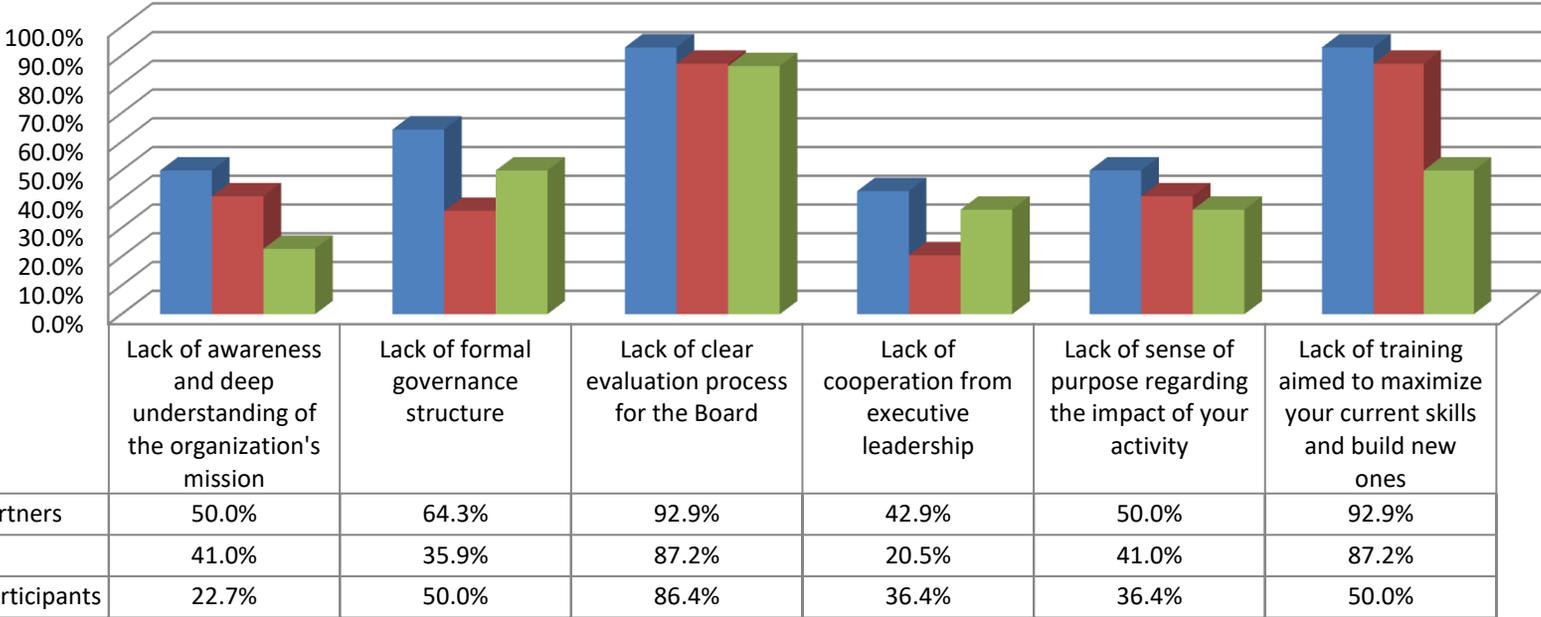


Figure 3a. (Self)-Assessment of the Board Members performance perception as “Very Solid” and “Sufficient”

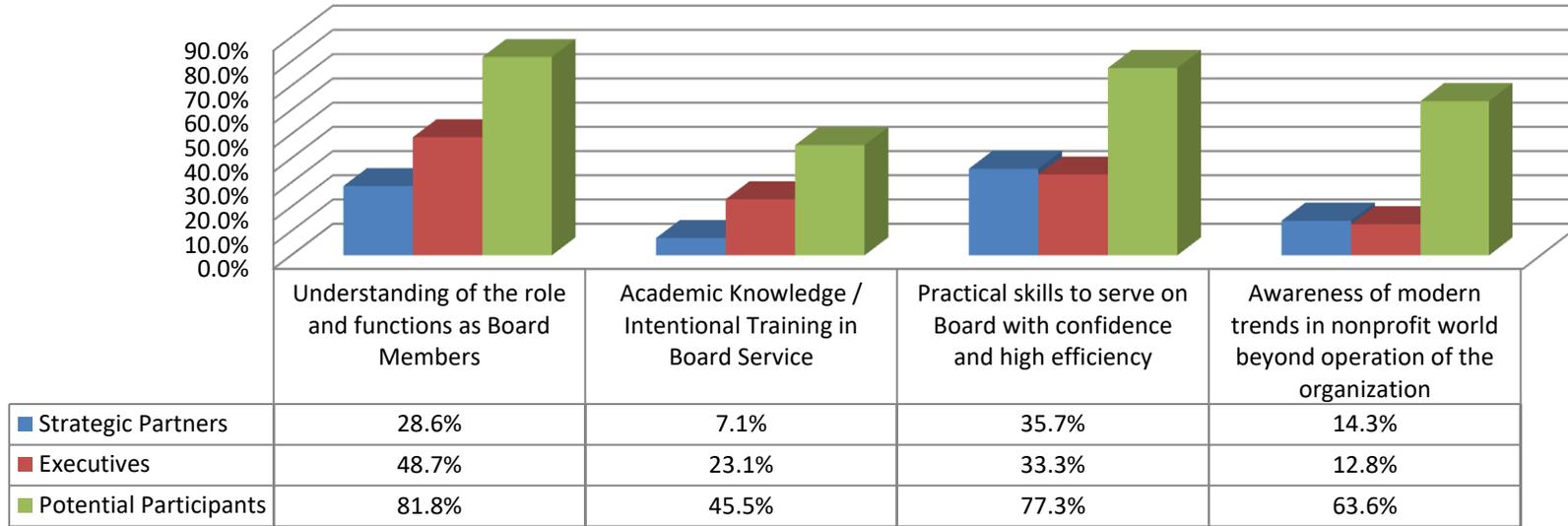


Figure 3b. (Self)-Assessment of the Board Members performance perception as “Certain aspects require clarification/training / A comprehensive training is required for improvement of operation”

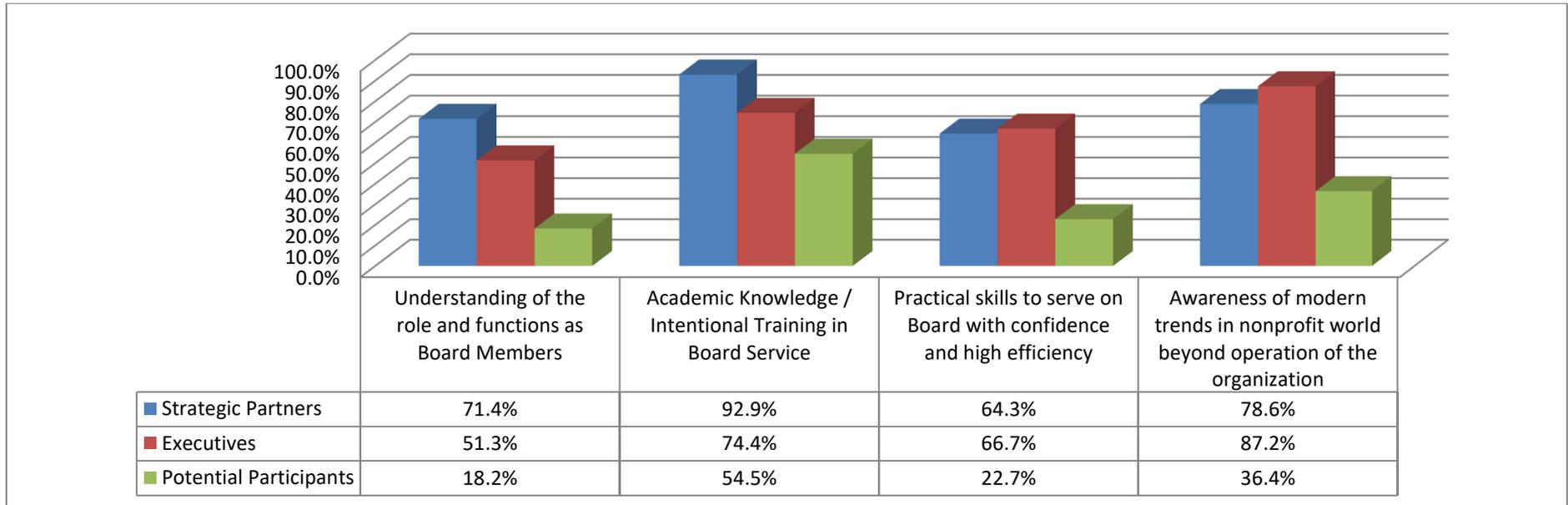


Figure 4. Willingness of Strategic Partners and Executives to join the Training Course (or its certain relevant sections) along with the Board members

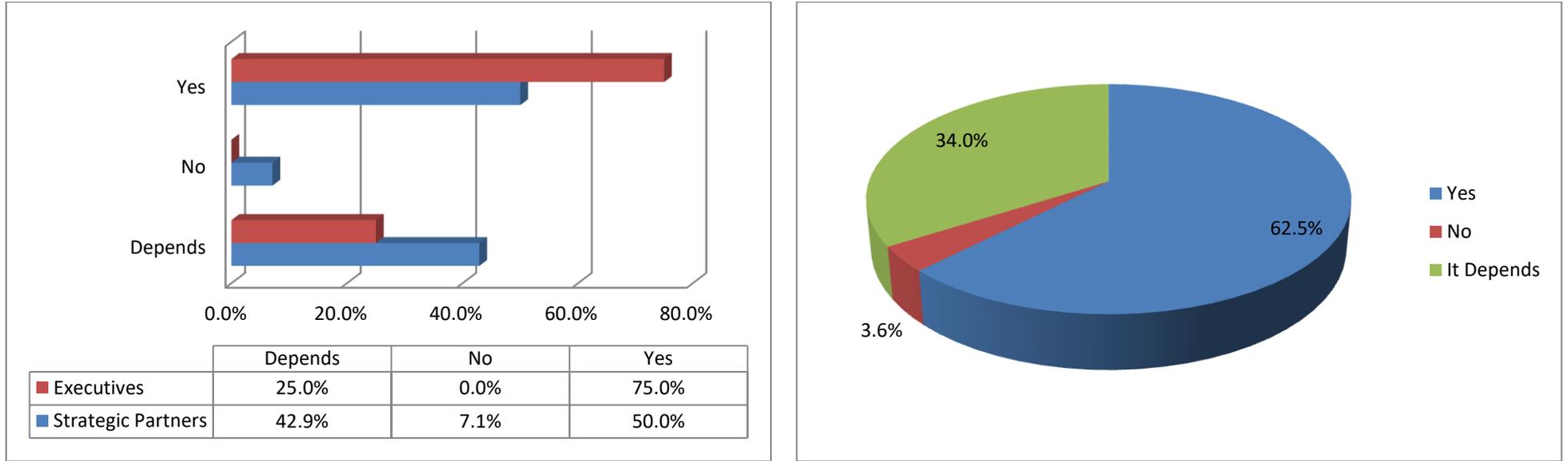
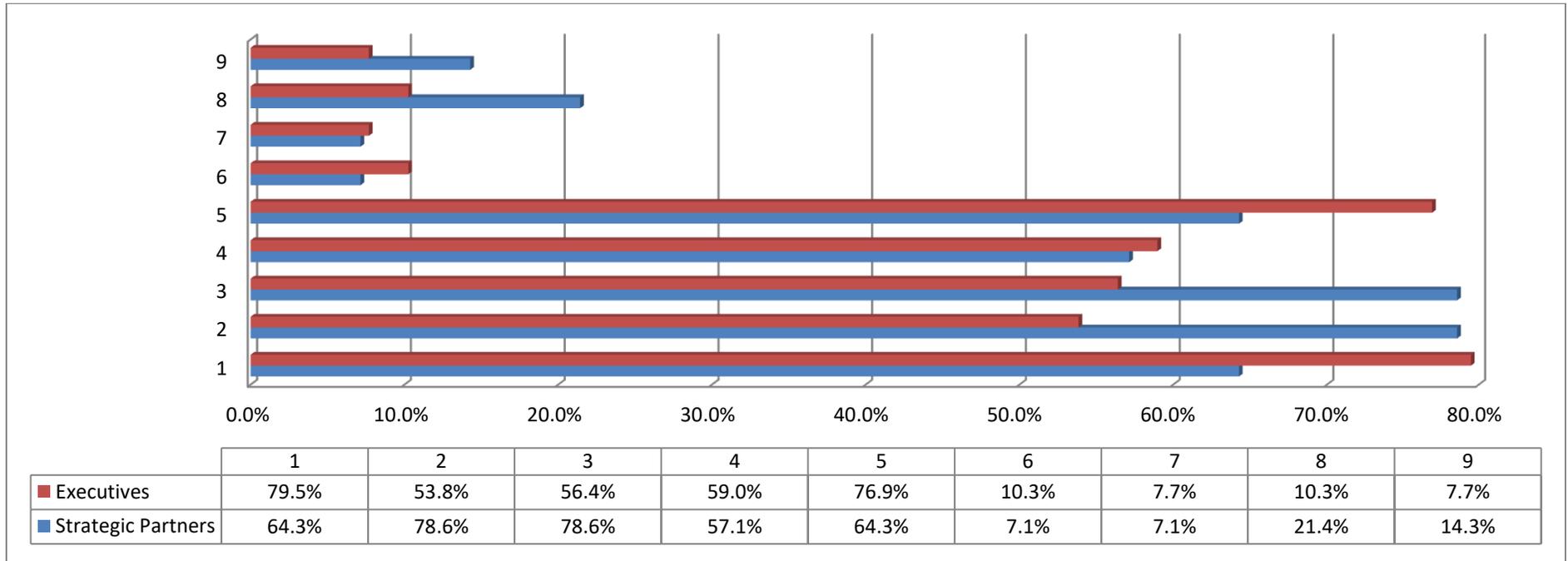


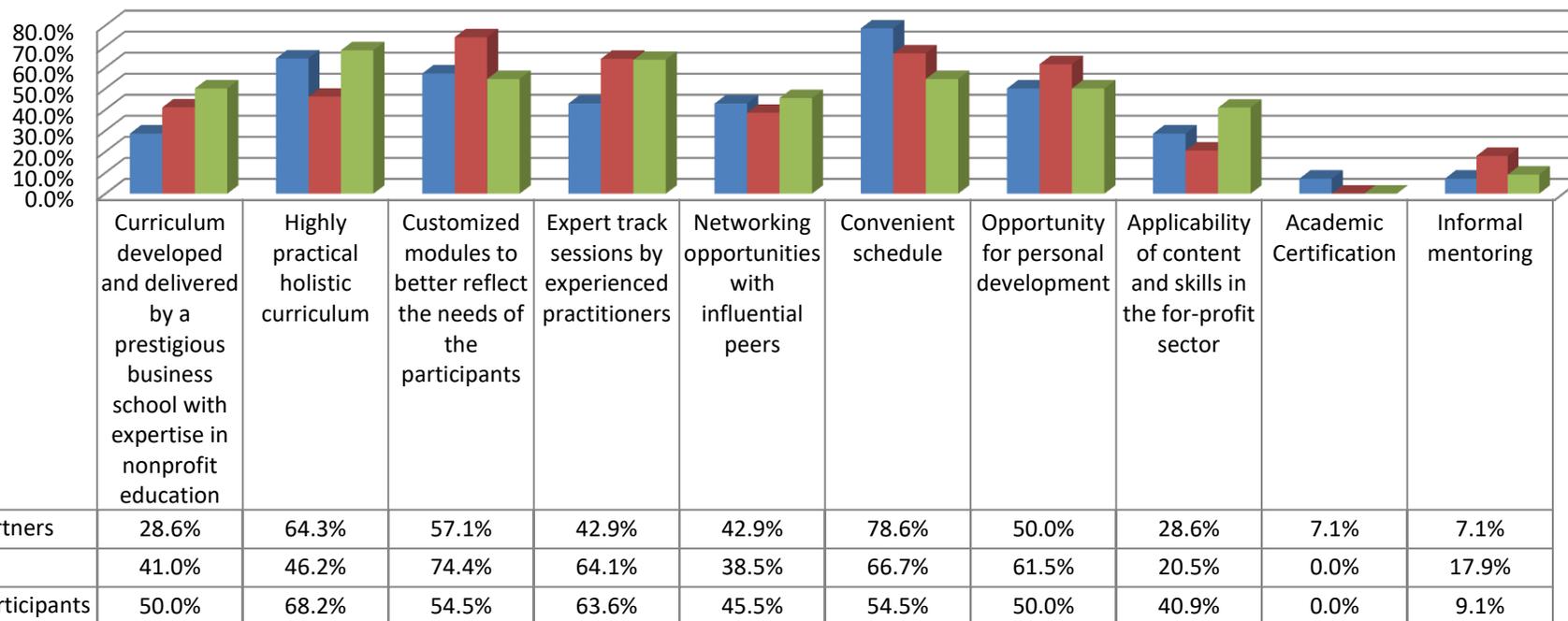
Figure 5. Analysis of the reasons behind Willingness to Take the Board Training Course



[Legend for Figure 5](#)

	Statement	Strategic Partners	Executives
1	This training would help to increase the level of my communication and cooperation with the Board and Executive Leadership of the organization(s) I support	64.3%	79.5%
2	This training would help to better define the strategy of the organization(s) I support	78.6%	53.8%
3	This training would help to fine-tune the operational processes within the organization(s) I support	78.6%	56.4%
4	This training would help to stay "on the same page" with regard to the understanding of current trends	57.1%	59.0%
5	This training would help to learn from the "Best Practices" in the sector	64.3%	76.9%
6	Everything generally works well and there's little room for improvement	7.1%	10.3%
7	I am too busy, so I cannot commit for such a Course, even though I understand the need	7.1%	7.7%
8	I doubt this training would solve the challenges the organization(s) I support face(s)	21.4%	10.3%
9	I doubt this training would help to resolve miscommunication between the Board and the Executive Leadership	14.3%	7.7%

Figure 6. Factors Influencing the Decision to Join the Course



Series of Figure 7. Assessment of the Curriculum Relevance

Figure 7a. Introduction to the Nonprofit Sector

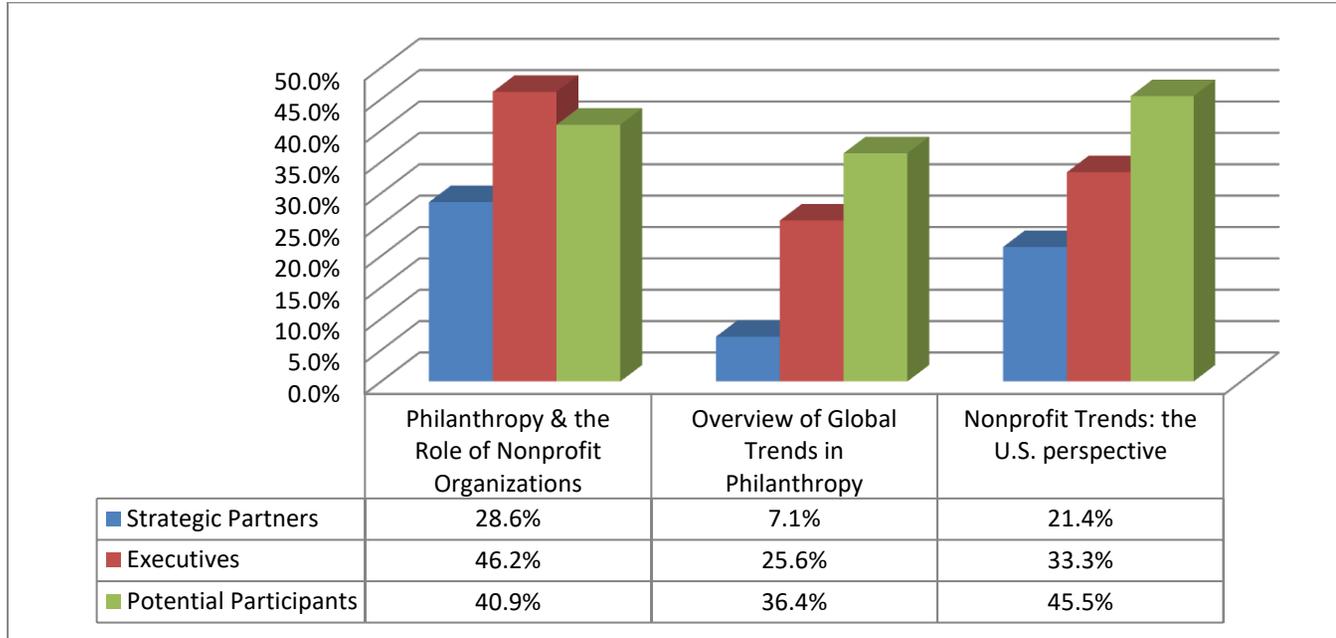


Figure 7b. Board

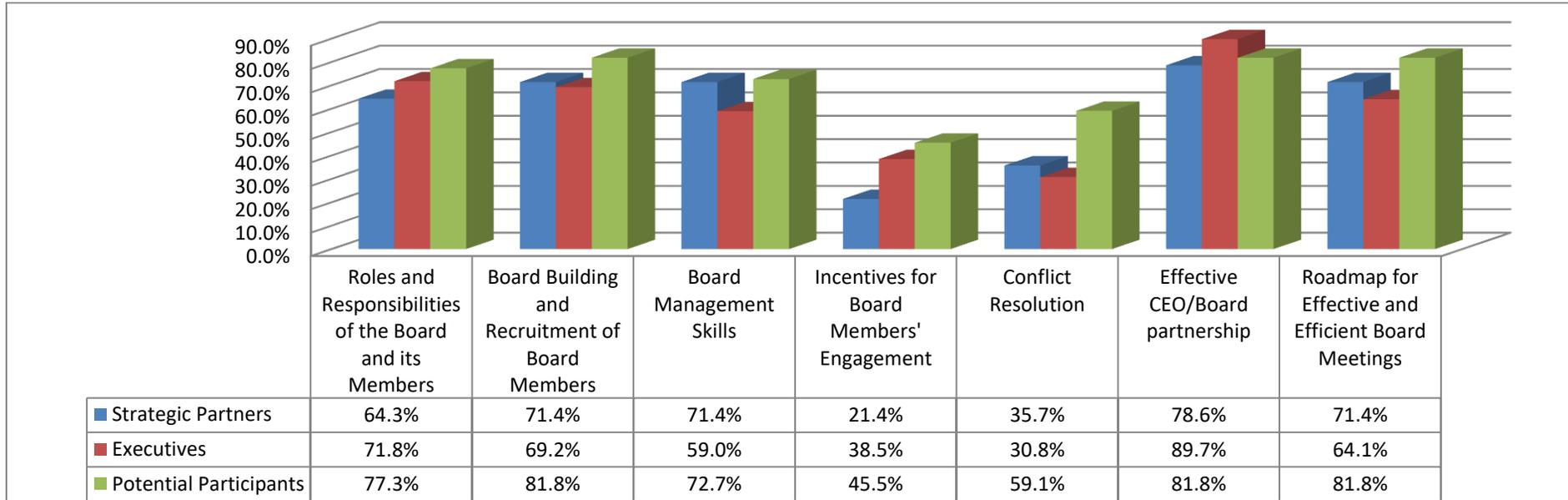


Figure 7c. Financial and Legal Issues in the Nonprofit Sector

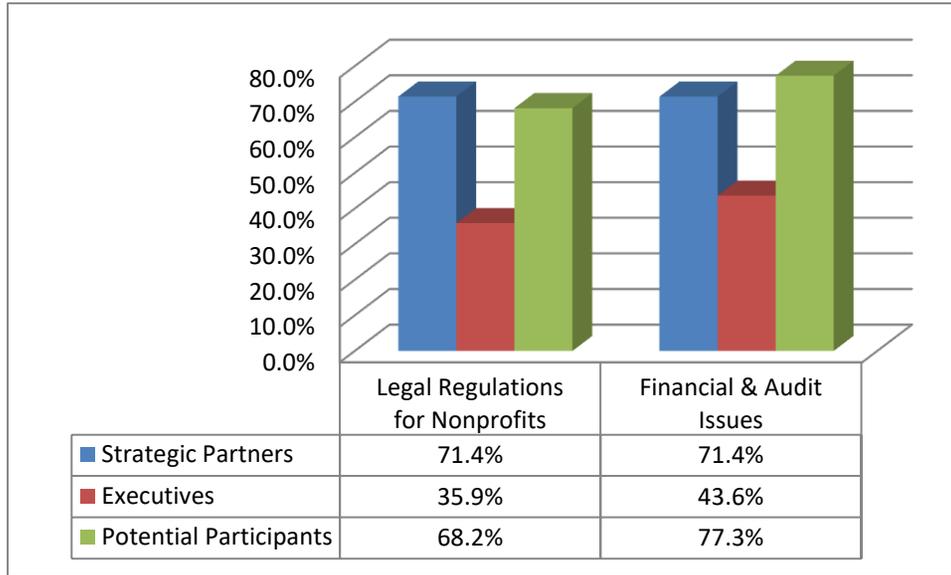


Figure 7d. Resource Development & HR

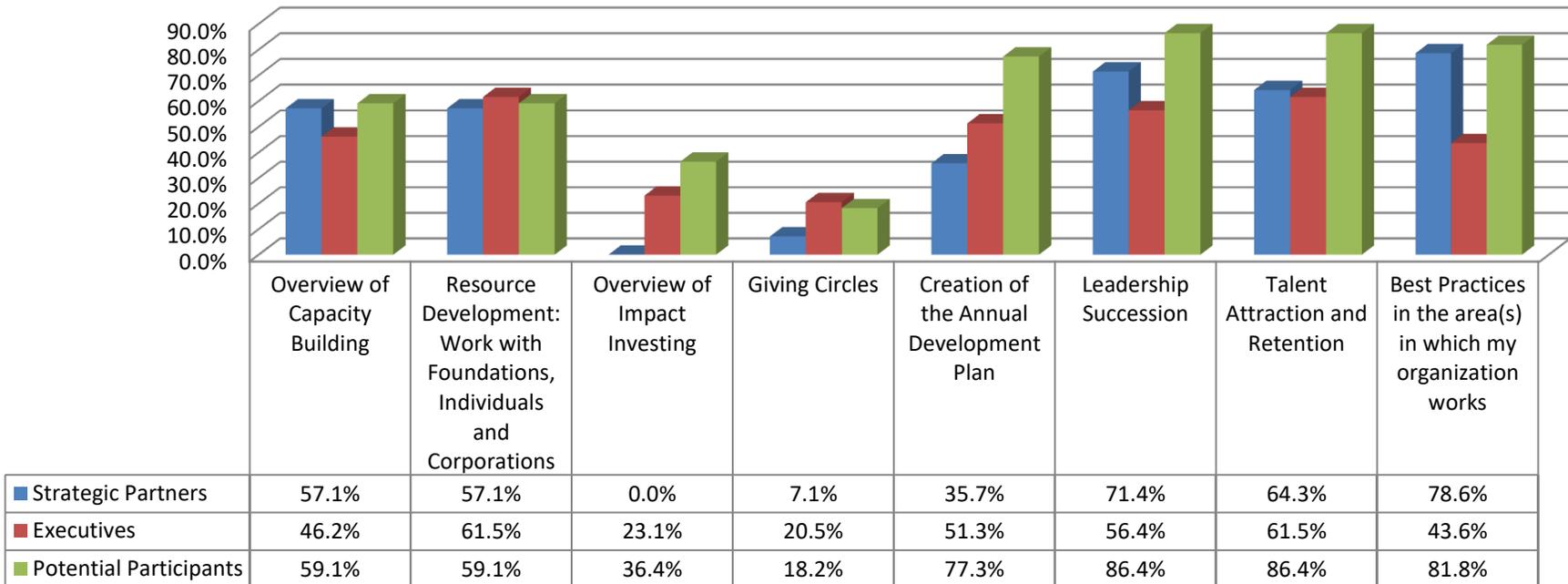


Figure 7e. Marketing & New Technologies

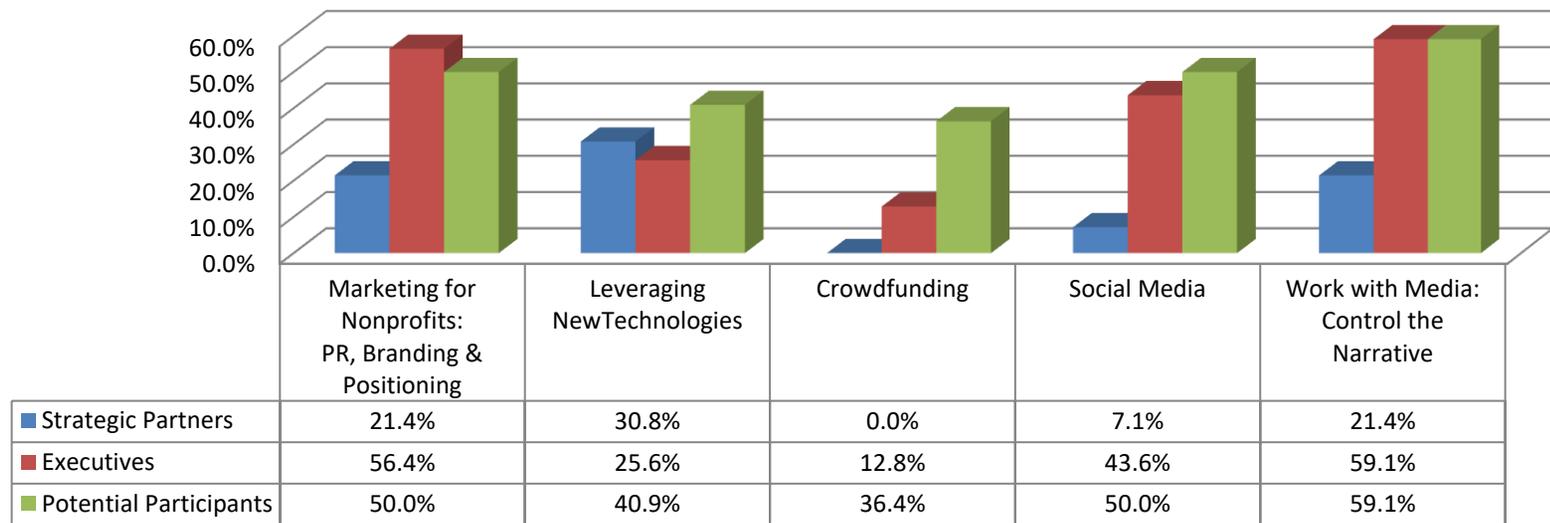


Figure 7f. Strategic Management

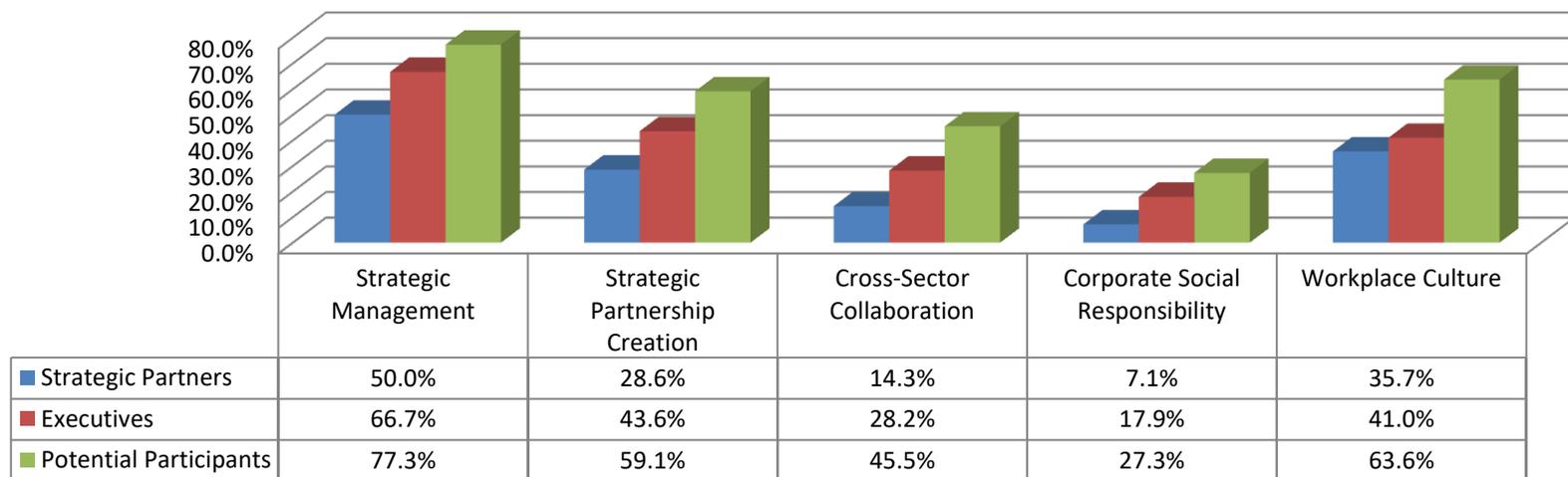


Figure 7g. Measuring Impact

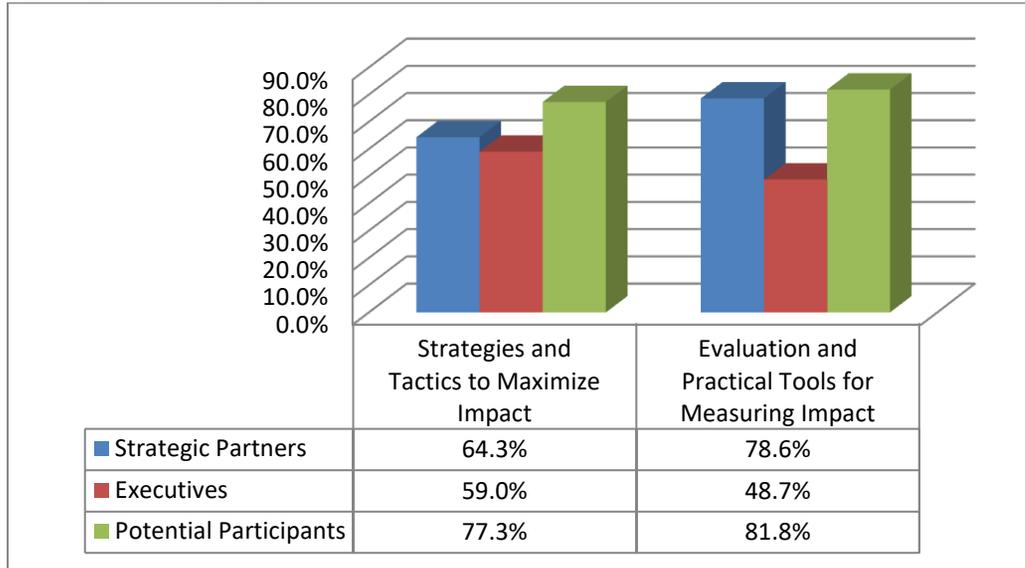


Figure 7h. Customized Module: Challenges and Opportunities of Jewish Nonprofits in the U.S.

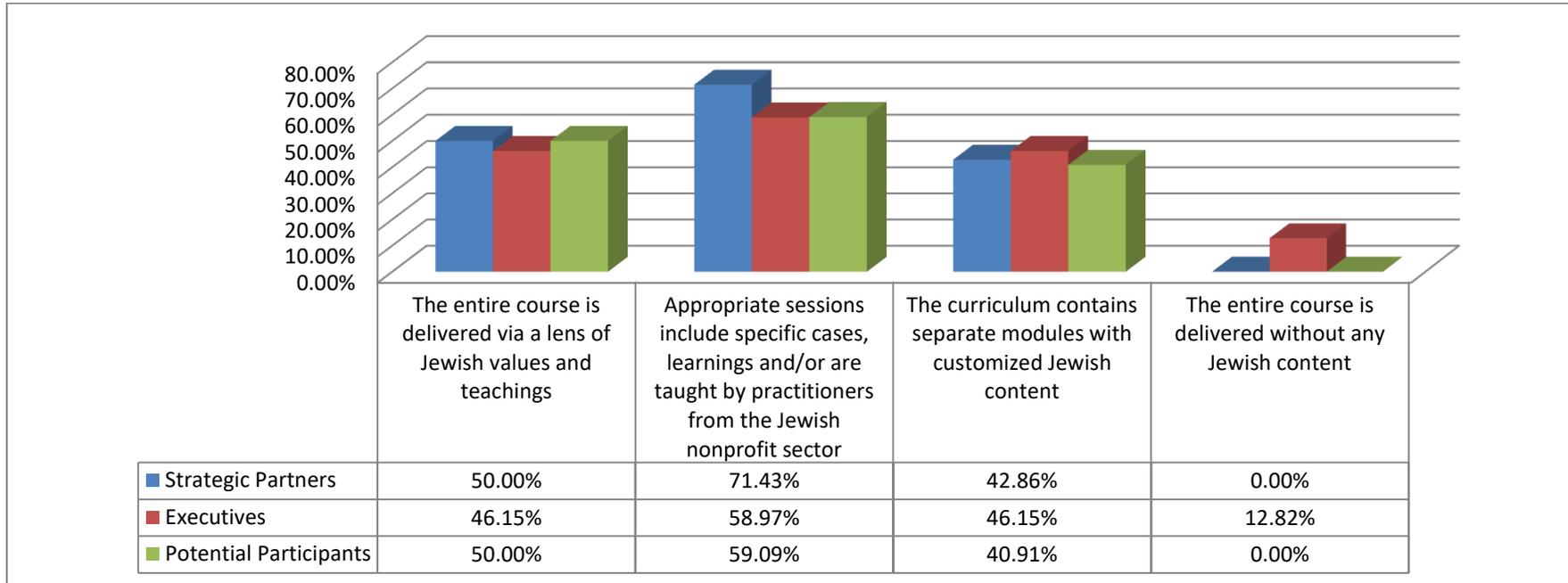


Figure 8. Partnership Formats for the Interested Strategic Partners

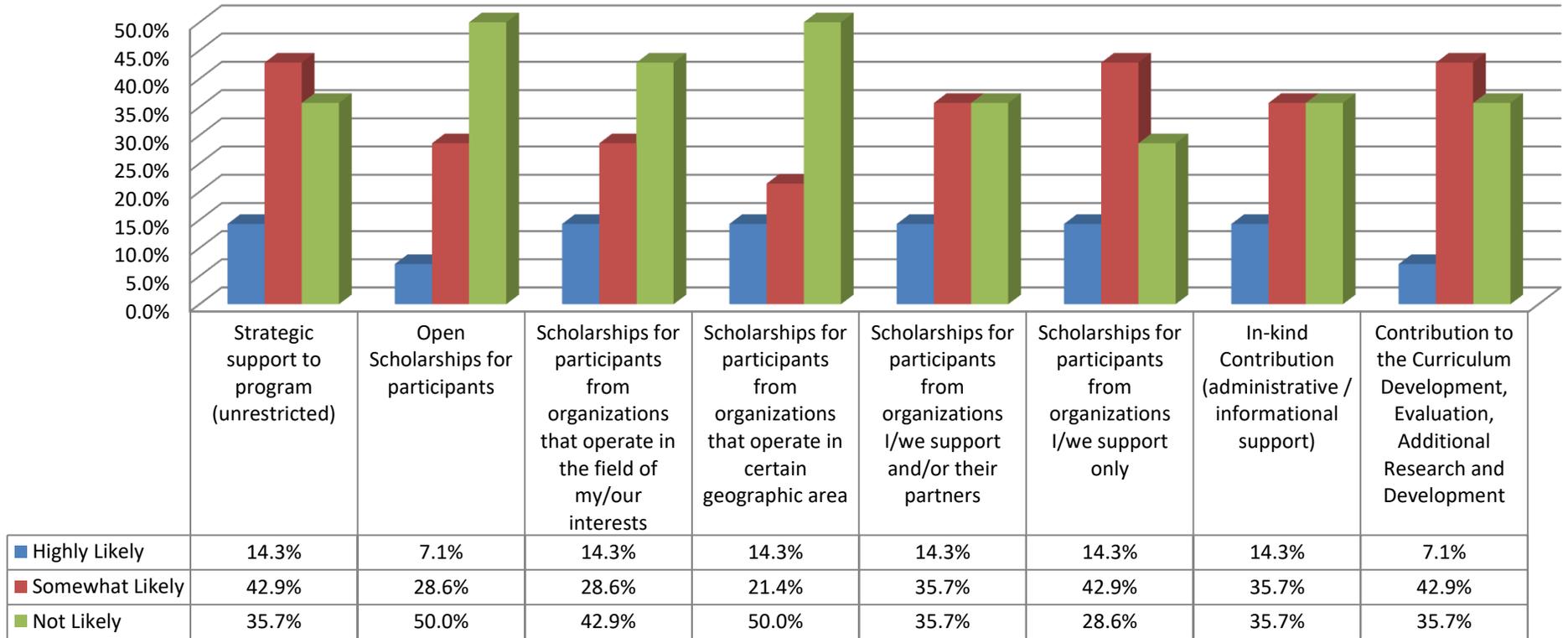


Figure 9. Program Areas / Funding Priorities of the Respondents' Nonprofits

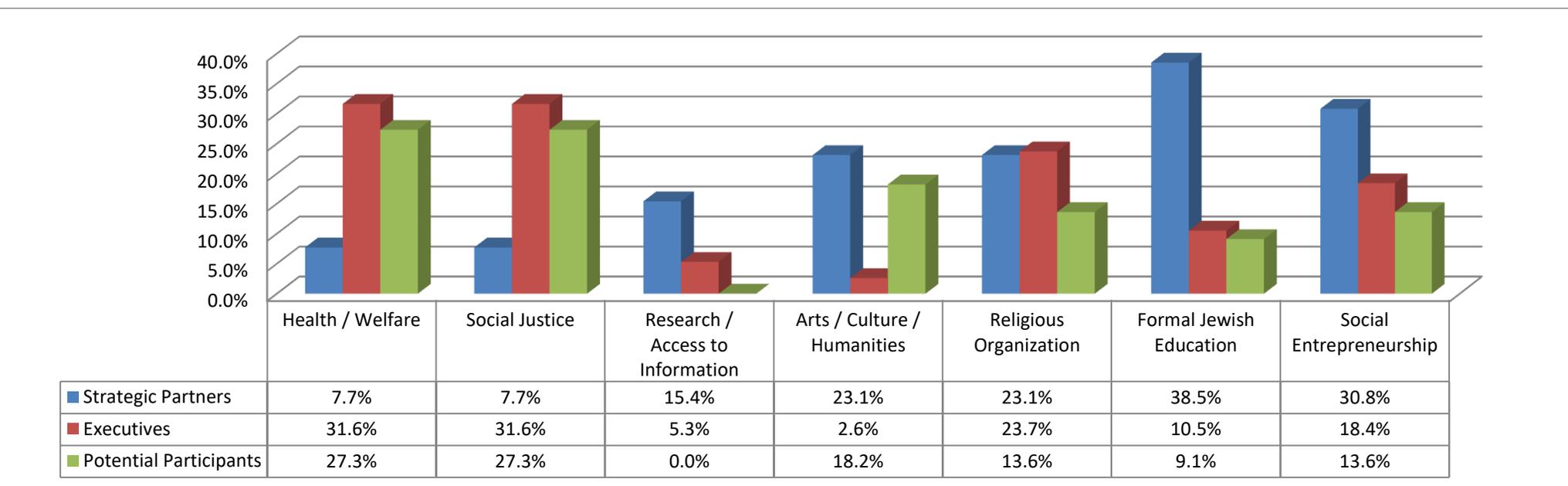
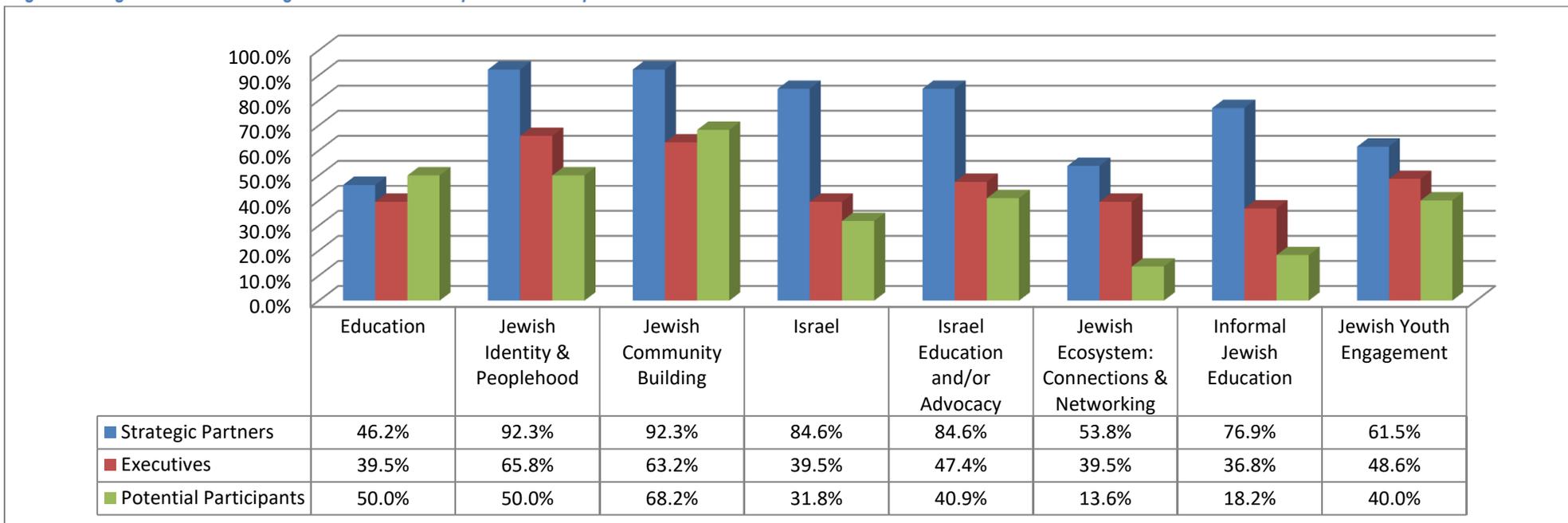
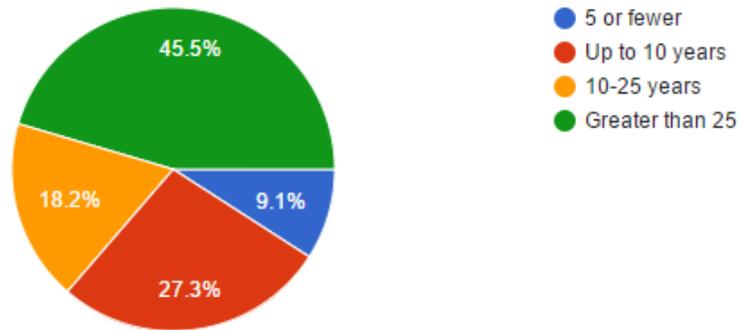


Figure 10a. Potential Participants: Experience in the Field

Years of experience on Board(s) – cumulative



Years of experience with Jewish nonprofits

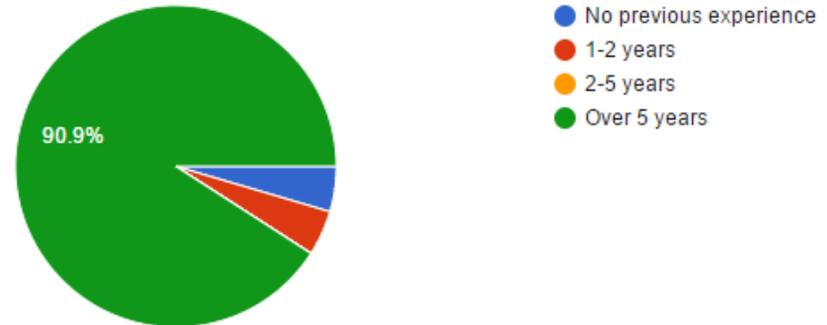
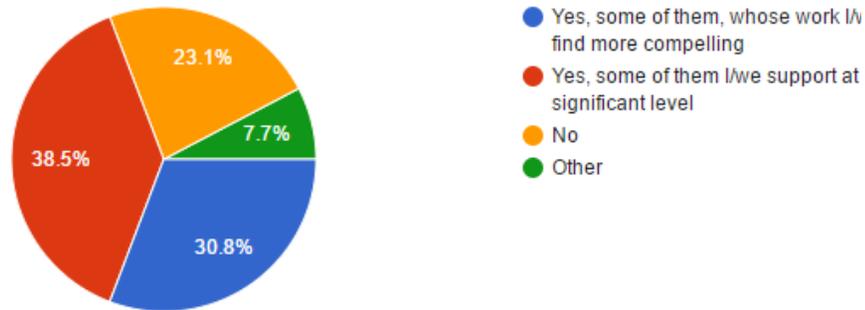


Figure 10b. Strategic Partners: Experience in the Field

Do you personally serve on the Board of the organization(s) you support



Years of your Experience with Jewish philanthropy

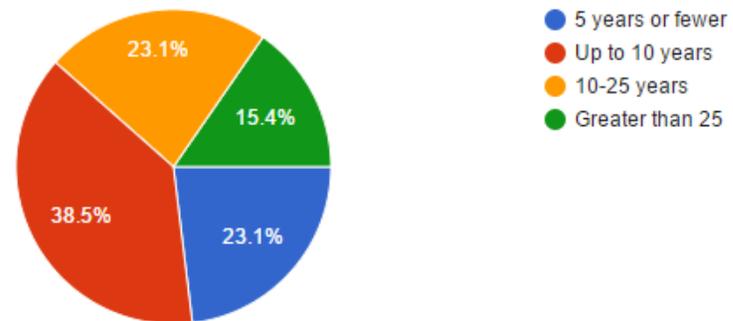
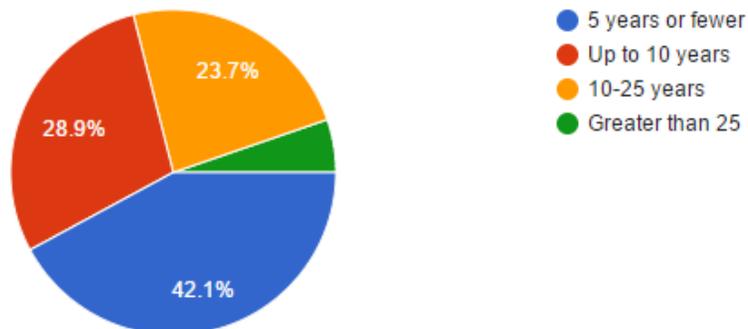


Figure 10c. Executives: Experience in the Field

Years of service as an Executive of your organization



Years of your Experience with Jewish Nonprofits

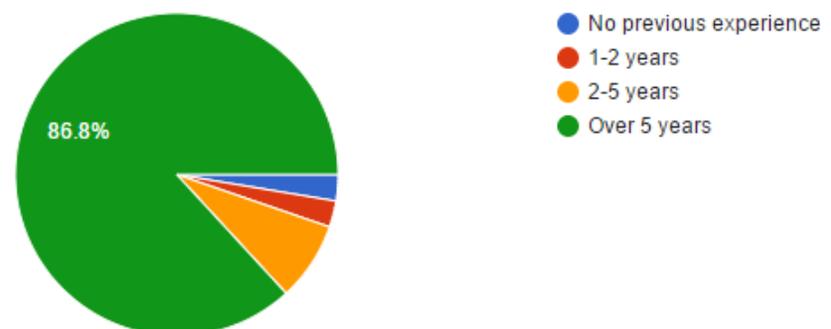


Figure 11a. Assessment of Incentives marked as “Important and Highly Important” for involvement into philanthropic activity / serving as an Executive of Nonprofit *

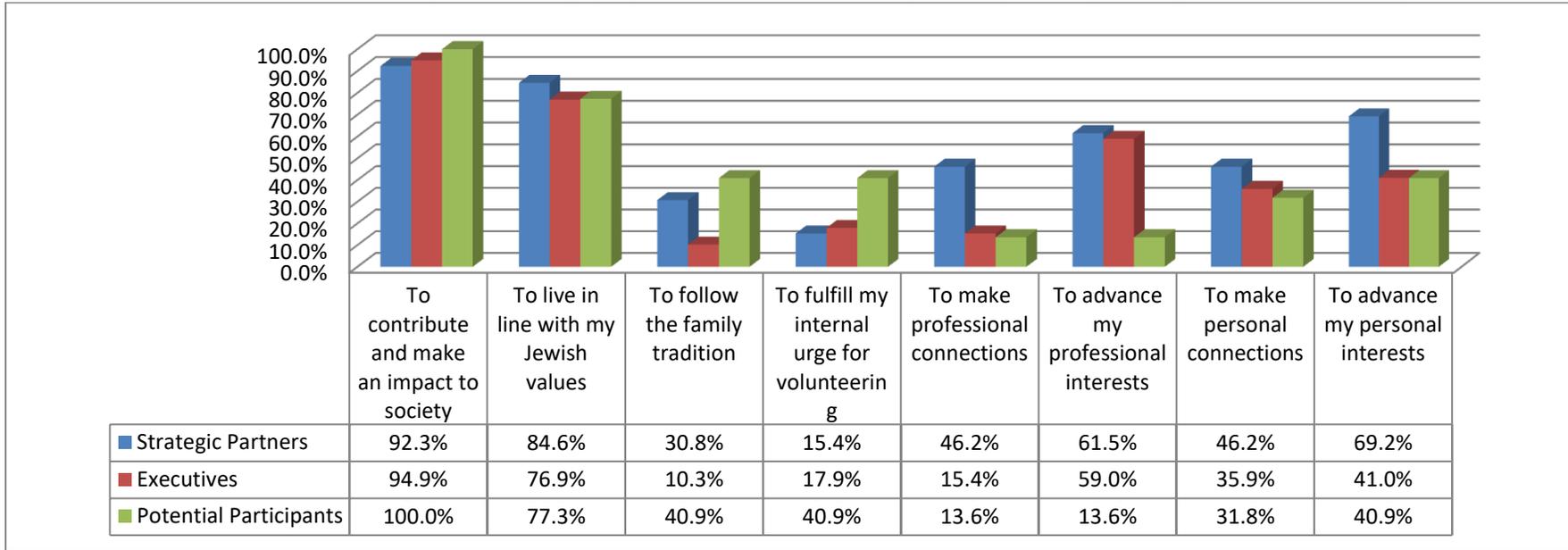
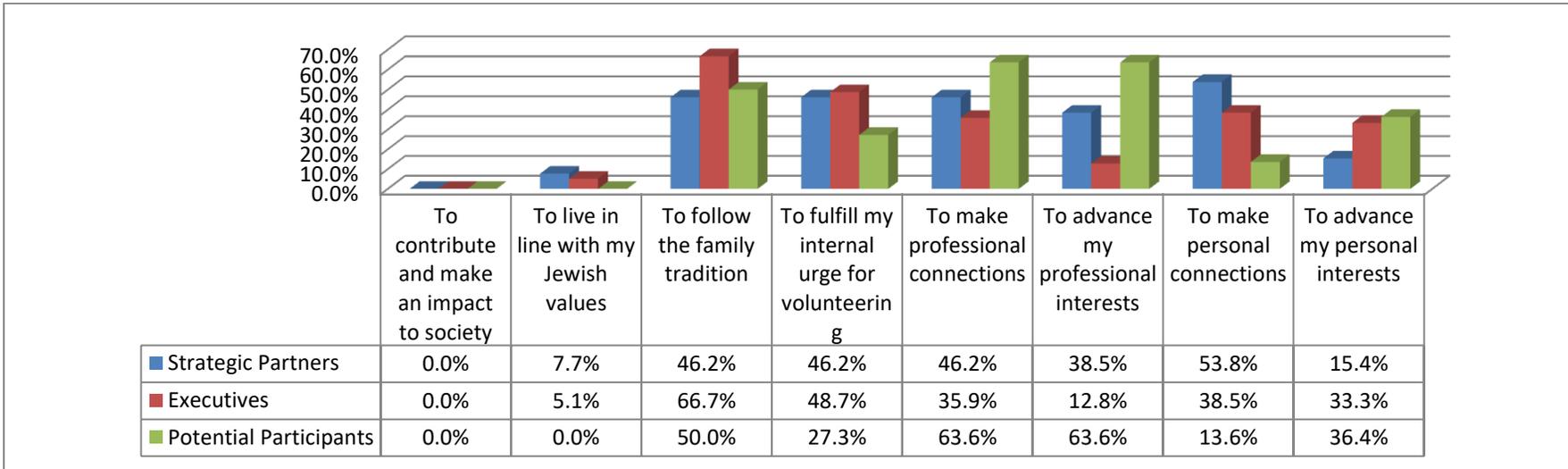


Figure 11b. Assessment of Incentives marked as “Not Important and Irrelevant” for involvement into philanthropic activity / serving as an Executive of Nonprofit *



* - The respondents were given 5 ranks of importance: Highly Important / Important / Somewhat important / Not Important / Not relevant.

For the purposes of the analyses only strong opinions were analyzed, for “somewhat important” answers do not signal about significance or irrelevance of the incentive to the decision about involvement into the philanthropic / nonprofit activity