

HEBREW UNION COLLEGE - JEWISH INSTITUTE OF RELIGION  
NEW YORK SCHOOL

FINAL THESIS APPROVAL FORM

AUTHOR: Dena Wachtel Stein Laying In-Roads:  
TITLE: Engaging Jews in their 20s and 30s  
through Lay Leadership

Sarah Benor  
SIGNATURE OF ADVISOR(S)

12/16/10  
Date

\_\_\_\_\_  
SIGNATURE OF REGISTRAR

\_\_\_\_\_  
Date

.....  

ALL SIGNATURES MUST BE OBTAINED BEFORE YOUR THESIS WILL BE  
CONSIDERED ACCEPTED.

**PLEASE TYPE OR PRINT ALL INFORMATION ON THIS FORM.**

**LAYING IN-ROADS:  
ENGAGING JEWS IN THEIR 20s AND 30s  
THROUGH LAY LEADERSHIP**

Dena Wachtel Stein

---

Thesis submitted in partial fulfillment of the requirements for the degree of  
Master of Arts in Jewish Communal Service

Hebrew Union College-Jewish Institute of Religion


December 2010

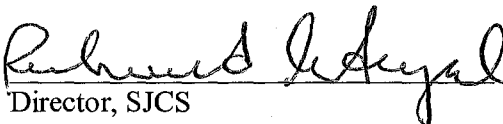
HEBREW UNION COLLEGE - JEWISH INSTITUTE OF RELIGION

SCHOOL OF JEWISH COMMUNAL SERVICE

LAYING IN-ROADS:  
ENGAGING JEWS IN THEIR 20S AND 30S THROUGH LAY LEADERSHIP

Approved By:

  
\_\_\_\_\_  
Advisor(s)

\_\_\_\_\_  
  
Director, SJCS

## **Table of Contents**

Executive Summary	5
Acknowledgements	7
Chapter 1: Introduction	9
Chapter 2: Leadership, Past and Present	12
Chapter 3: Understanding the Generation	20
Chapter 4: Methodology and Agencies	26
UJA-Federation of New York	28
American Jewish World Service	34
Chapter 5: Findings	42
Coming to the Organization	43
Why They Stayed Involved	44
Desire to Make an Impact	45
Connection to Organization, Group, and People	46
Involvement Outside of Work	48
Experience with a Board and Nonprofit Organization	49
Board Involvement – Successes and Challenges	50
Support	50
Board Function	52
Participation	54
Future Involvement	56
Findings Summary	57
Chapter 6: Conclusion – What Agencies Can Learn	59

Know Who You Are	59
Don't Be Afraid of Change	60
Relationships, Relationships, Relationships	60
Involve 20s and 30s to Attract 20s and 30s	61
Be Outcome Oriented	62
Ask	62
Make Room for New Board Members	63
Provide Experiences that are Hands-On as well as Fiduciary	63
Provide Adequate Training and Explanation	64
Provide Adequate Support	64
First Impressions Count	64
Timing is Key	65
Summary	66
Works Cited	67

## **Executive Summary**

As the Jewish community evolves it is imperative that organizations keep up with the dynamic rate of change if they want to survive. Lay leadership is one area where this change is sorely needed. Agencies must create a quality succession plan and actively seek engagement of young professionals. These young professionals represent a different generation than their parents and grandparents, which calls for a new model of engagement and governance. While their parents' generation often participated out of a sense of obligation, today's young leaders seek experiences that are, primarily, personally meaningful and fulfilling. While this is a challenge for many organizations, the benefits of undertaking this change include new energy, new ideas, and sustainability for the agency.

This thesis examines two programs at Jewish agencies in New York City that are actively engaging young professionals and grooming them for participation with the organization and board leadership: Observership through UJA-Federation of New York and Global Circle, an initiative of American Jewish World Service. Through an in depth look at these programs, including interviews with participants, program directors, and professionals, the thesis identifies factors that brought the participants to the program and led to their future involvement choices. It offers recommendations for organizations that are interested in engaging young professionals onto their boards.

It is possible to engage young leaders, but organizations must first reflect on who they are and how their mission might be appealing to younger Jews. They must try to create events and situations that appeal to them, in both content and accessibility. Organizations should allow for young professionals to use their skills in a meaningful

way. Today's young leaders want hands on experiences and want to know that their contributions create meaningful change for organizations. Even if they are not able to give financially at the same level as senior leaders, they want to feel that their contributions—both monetary and otherwise—are equally significant. More than anything, research shows that young professionals want experiences that are personally meaningful. When young leaders are recruited they need support through training and mentorship programs. Finally, organizations must be committed to lasting and sustaining relationships and show a capacity for change if they hope to engage new leaders for a sustainable future.

## **Acknowledgements**

The opportunity to participate in the double masters degree program through Hebrew Union College's School of Jewish Communal Service and New York School of Education was a truly remarkable experience for me. I would like to thank the entire faculty, who has given of their time, energy and expertise through both programs. I would especially like to thank Richard Siegel and Lori Klein for acting as teachers, mentors and guides, instilling an understanding of Jewish communal professional work that will stay with me throughout my career. I have been blessed to be a part of an exceptional cohort of students, who have each taught me an incredible amount. I am proud to call them colleagues and friends.

This thesis would not have been a reality without the guidance from my advisor, Dr. Sarah Bunin Benor. Her experience, time, and patience allowed me to formulate my goals and visions for this project and see them come to fruition. I deeply appreciate her willingness and diligence to work within our bi-coastal constraints. Thank you also to Gerald Bubis, who helped guide the early stages of this research. His expertise in board governance was indispensable, as was his thoughtful advice as to the best way to frame this study. I would also like to acknowledge Marjorie Spitz Nagrotsky and Samantha Pohl, who read an early draft of this thesis, and provided useful feedback. Their insightful comments and diligence shaped this paper, and I am grateful for their dedication. If errors remain, they are entirely my own.

The research for this thesis would not have been possible without the help of professionals and participants from UJA-Federation of New York and American Jewish World Service. I would like to thank them for the access to necessary materials and



individuals and their openness in discussing their programs and institutions. The work that each organization does is necessary to both the Jewish and greater communities. In particular, thank you to Hannah Toce, formerly of UJA-Federation, and Jenny Goldstein of American Jewish World Service for sitting with me on multiple occasions, and for helping me to better understand their organizations and their work.

Lastly, I would like to thank my family and friends for their support while I worked to complete the requirements for both masters' degrees. I could not have done this without their assistance and love. In particular, thank you to my husband, Rabbi Daniel Stein, for always listening to my ideas, giving me a different perspective, and providing unending support.

It is my deepest hope that this research will aid organizations that are interested in questioning the demographic make-up and responsibilities of their board members. To actively look at engagement of a new generation is a process that can ultimately create lasting change in an organization. I hope that organizations take the time to look introspectively and make the changes to ensure their sustainable future.

## Chapter I Introduction

Perhaps the greatest spiritual innovation of Lurianic Kabbalah is the partnership it creates between God and humanity. In this worldview God grants humanity responsibility over certain aspects of creation, and charges humans with effecting change or *tikkun* in the world. The only way that God is able to do this is if “God concentrates Himself not out there, at a point in the world, but within Himself. By this act He leaves a void in which His creatures can come into being. Tzimtzum, then, is not itself creation but the necessary prelude to it” (Borowitz, 1992). In pulling back, God establishes the space necessary for creation to occur and for man to work at completing creation. In this story, God is given the characteristics of a supreme leader: able to do the job alone but understanding that in order for growth to occur in others, space is needed.

Though this religious narrative might be spiritually compelling, my interest in it stems from its applicability to the Jewish nonprofit world, where boards often lead organizations without making room for the next generation of leaders. All too often, older, seasoned leadership fills the majority of seats on these boards. Though these leaders may bring with them a wealth of knowledge, as well as considerable financial means, they also present a serious challenge: they do not create a sustainable future for the organizations they serve. In such situations there is seldom room for the next generation of leaders to emerge, nor knowledge of how to recruit and incorporate them into the process of leadership. New leaders bring new ideas, energy, and excitement that will be missed if the current leadership never changes. What is needed is a *tzimtzum* of leadership whereby the veteran leadership lays the foundation, actively engages and

trains the new leaders, then pulls back, staying involved but providing these new leaders the opportunity for involvement on their own terms.

Over the last several years, UJA-Federation of New York (UJA-Federation) has run a board development and training program called “Observership.” This is an initiative of UJA-Federation of New York that engages young professionals by allowing them to sit on a network agency board for a year while attending supplemental learning programs through UJA-Federation. During a wrap-up session for the program, its organizer expressed the key issue surrounding quality engagement:

I’ve never had to force an Observer [participant on a UJA-Federation of New York board observation program] down someone’s throat, because they are excited about having young blood and new ideas around the table. That being said, one of the things that I often hear...is that sometimes when [participants] get there it doesn’t... necessarily feel that way...sometimes it feels like there’s a disconnect between what they are saying...and what the actual action is.

In speaking with the participants, the program organizer pointed to the crux of the issue surrounding board engagement of younger professionals: the disconnect between what the board express they want when engaging young professionals and how they go about engaging them.

In this thesis I examine the necessity and struggle of engagement, explore the needs of twenty-five to thirty-five year olds, and suggest opportunities for engagement based on the findings from my research. To do this I researched two young leadership engagement and training programs that currently exist in the New York City Jewish community. The first is the Observership Program through UJA-Federation of New York. The second program is American Jewish World Service’s (AJWS) Global Circle Initiative. This new initiative seeks to engage young professionals and educate them about AJWS’s causes with the hope of cultivating them as future board leaders and

donors. Using interviews with program staff and participants, observations from events, available information from the organizations, and relevant literature, I offer a best practices guide that organizations of any size can use to think about moving forward with engagement of young professionals.

The process of engaging young professionals cannot be done without a willingness to change. Bethamie Horowitz, in her article “A Gap of Our Own Generation,” calls on Jewish institutions to embrace larger cultural changes occurring in America. She writes, “A shift is needed, to recognize that pride, pleasure and meaning play a bigger role today than fear, guilt and obligation” (Horowitz, 2006). Jewish organizations, she asserts, must understand the needs of this new generation and work to create changes in their organization that reflect the desires of the younger generation. Indeed, where “fear, guilt and obligation” (Horowitz, 2006) once were uniting factors for the Jewish community, they have less contemporary relevance to young people, as Jews have grown more comfortable as Americans. If organizations are to expand and thrive they must embrace engaging young professionals by understanding their needs. At the very least this can lead boards to willingly give young professionals roles on their own terms. Thinking more broadly, this could lead to a restructuring of board roles and responsibilities in order to create more opportunities for young professional engagement.

## **Chapter II: Leadership, Past and Present**

For many of today's successful nonprofits, governance and board involvement have emerged as issues of critical importance. An agency is unable to function – legally or practically – without a board. Maintaining a healthy board and providing qualified, diverse leadership, however, is often easier said than done. Over the past several decades, the landscape of nonprofit board engagement has changed dramatically. This chapter examines the origins of nonprofit boards as they exist today, the relationship between the board and the staff, and what is needed to take board governance and qualified leadership into the future, given new and changing realities.

In order to envision the future of good board governance practices, it is instructive to understand their evolution. Gerald Bubis explains that the current board structure developed out of a culture of volunteerism. At the turn of the century, staff-run social sector agencies did not exist in the Jewish community. At the end of the nineteenth century, an unprecedented wave of immigration prompted Jewish communal leaders to create new institutions that addressed emerging and immediate needs. These social service organizations cared for and protected the Jewish community. As these organizations grew, the need for paid professionals who would focus their time and attention on the institution grew as well. "Sometimes slowly, sometimes quickly, sometimes unevenly and with little forethought, people were hired to provide the services. Volunteers still worked side-by-side, hand-in-hand with those they hired" (Bubis, 1993). The transition from volunteer- to staff- managed institutions was not an easy one for the Jewish community to make. Conflicts between staff and volunteers were

prominent then as they still are today. To limit such conflicts, the two constituencies needed to clarify their roles (Bubis, 1993).

Bubis cites twelve main roles for board members: legal oversight; hiring and firing of staff; agency oversight; selection and election of leadership; policy formation; resource development; evaluation procedures; board recruitment; human resource development; planning; program development; and acting as interpreters to the community (Bubis, 1993). The board members' core responsibilities, as defined by Bubis are focused on the legal, fiduciary, and oversight functions.

UJA-Federation provides an *Agency Board Governance Primer* (Zimmerman, 2004) to board members of local Jewish nonprofit grant recipient organizations. In it they describe the role of board members in detail. Like Bubis, the *Primer* focuses on the legal, oversight, and fiduciary responsibilities of the board. "Because, for the organization to function effectively, the board must delegate day-to-day operations to the executive director, oversight is the board's chief operational role" (Zimmerman, 2004). In this way, both Bubis and the *Primer* work to delineate the distinctions between the staff and the board. Unfortunately this theoretical understanding of duties is often blurred in practice.

According to *Governance as Leadership*, the three main spheres of responsibility put forth by Bubis and Zimmerman are places where professionals play key roles as well. This overlap makes understanding the differences between the staff and lay roles harder, often causing frustration. Chait and colleagues define this as a "problem of purpose" (Chait et al., 2005, 14). They explain there are ways the problem of purpose plays out: official work is episodic but board members do not accept that; some official work is

unsatisfying, so board members seek non-official work to satisfy their needs; important board work is often undemanding; and lastly, some work is exciting and rewarding but not encouraged. The perception from board members, therefore, is that their primary role is not engaging. What is needed, the authors suggest, is a move away from task oriented board work. Boards must ask themselves bigger questions such as, “What is it we’re governing?” (Chait et al., 2005, 25). What exists currently on many boards is a disconnect between the assumptions that board members have about their work, the board and the agency—what the authors call one’s “mental maps” (Chait et al., 2005, 26)— and the “modes” or cognitive approaches utilized based on the agency’s needs. In other words, what the board members expect to do is often different than how the work is actually achieved. Enacting a change towards big picture governance will lead to board members feeling fulfilled in their roles, thereby creating a stronger sense of ownership for the agency.

Working toward a more engaging role for board members only partially creates a functioning board. The leadership qualities of volunteers also play a crucial role in their effectiveness as leaders. Traditionally it was suggested that boards should consist of members who have any combination of three main factors: wealth, wisdom and work. Wealth refers to one’s ability to financially support the organization. Wisdom suggests the capacity of an individual to understand the community and maintain a wealth of decision-making experience. Work describes a person who is willing to put in the effort necessary for the organization to function. They are present for board meetings, prepare for these meetings by reading and reacting to reports, and accept tasks (Bubis, 1999).

Bubis takes this notion a step further and suggests that boards also should possess members with wit and wallop. Wit and humor are necessary to relieve stress and tension during board meetings. The ability for a board member to lighten a serious mood can be the difference between solving an issue and leaving an open wound. Wallop describes a board member who has the ability to connect to others. This skill will allow the board member to help further the mission of the organization to others outside of the institution (Bubis, 1999).

For the sake of a peaceful relationship between staff and boards, Bubis suggests two more necessary attributes: people skills and *menschlichkeit*. People skills are the ability for board members to understand others around the table and know how to work with them and with others inside and outside the organization. *Menschlichkeit* deals with the respectful way in which board members treat one another and staff, providing each person with respect. Both of these skills help establish a positive board/staff relationship. Lastly, Bubis expresses that for a Jewish nonprofit, it is incredibly important that boards have members who are committed to Judaism. This value allows a Jewish organization to stay true to its mission and maintain Judaism as an integral part of its vision.

Along with these various qualities, it is necessary to consider demographic diversity. If a board is comprised of seasoned leadership who fulfill the characteristics cited by Bubis but does not engage a wide range of ages, genders, professional experiences and social expertise, then their ability to function at the highest quality and adequately achieve their institutional aims is hindered. This situation creates the potential for consensus without pushback, which is necessary for growth to occur.



*Governance as Leadership* suggests that boards faultily tend to “harvest rather than cultivate trustees with attractive traits and talents” (Chait et al., 2005, 138). When a trustee is “harvested” it implies that he or she is already a part of the agency and is in the process of being groomed for service. This type of board engagement brings new board members who often possess views that are in line with the thinking of that board. This results in a board with members who have similar specific talents with no foresight as to how they will function with the board. It is not surprising then, that this has resulted in boards and agencies that are not able to work at the highest level.

To fix this issue Chait et al. suggest that boards should learn to capture the four important forms of capital: intellectual capital, referring to the brainpower used to generate the things that agencies need, such as mission and necessary resources; reputational capital, which advances the reputation the board wants to achieve through its members; political capital, “the influence and leverage that people within an organization acquire and deploy to elevate one above others, and to promote one solution over another” (Chait et al., 2005, 151); and social capital, the connections and values that are made from social networks. The main difference between this model and older models of board development is that it forces board functioning to be accomplished collectively by the board rather than as individuals. The board is given the job of thinking strategically about how to utilize these four forms of capital in order to further the agency. Ideal candidates should not only possess individual traits but also understand the necessity of working within a team. When agencies create boards that are working teams they have a much better chance of streamlining their mission and vision to make them viable

institutions that can weather the economic change and remain relevant to new interests. Unfortunately, not every agency can accomplish this.

“The problem is that over time, organized Jewish life becomes a closed circle... So even though every organization espouses a commitment to bring in ‘new blood’, in reality those who are invited in are rarely those who challenge the status quo way of thinking” (Marker, 2003). If agencies and boards are to grow they must be open to challenging themselves and the normative board consensus. It is here that professionals in their twenties and thirties have much to offer. They are highly educated, think creatively, and can add depth to a board. Indeed, “many researchers believe that the impact of Millennials [and young professionals in general] will be far greater than that of the baby boomer generation” (Burkus, 2010).

Unfortunately engaging diverse board members of any age who can think strategically is difficult for many organizations. The 2001 *Jewish Policy Research Report* describes boards of the British nonprofit sector and the successes and challenges they face. The report finds that board make-up presented a crucial issue for many boards. Firstly, recruiting volunteers and those who will become leaders has been challenging, leading in many cases to an aging board. Secondly, pressures of time and responsibility have been a hindrance to cultivating new leadership. Thirdly, boards felt unsupported due to funding restrictions. Finally, the report cites engagement challenges based on attractive versus unattractive missions. Respondents argue that if their organization’s mission was not viewed as an attractive cause they had a difficult time recruiting new leaders to their boards. The factors these boards cite are challenges that exist with engagement for North American organizations as well. There are, however, ways to turn

these challenges into opportunities, but they take willingness for self-examination and change. But change they must, because as Steven Windmueller points out, the landscape of Jewish life is continuing to evolve.

In his article, "The Survival and Success of Jewish Institutions," Steven Windmueller suggests that the reason agencies have a difficult time in the changing communal landscape is due to their inability to weather change. He writes:

The challenges faced by agencies and the Jewish community today represent unique opportunities for the Jewish future. The ingenuity of leaders, the social environment in which these institutions operate, and their creative resilience and responsiveness, represent the framework for organizational transformation in the twenty-first century (Windmueller, 1999, 86).

How they approach this challenge and their ability to adapt within their agencies will dictate how they fare in a changing reality.

The key factor necessary to help weather this change, he suggests, is to know what people want. Rather than continuing with the status quo of those currently involved and lamenting the lack of newcomers who buy into their vision, Windmueller suggests that boards should understand what others want and work with them to achieve those goals. He explains that for agencies to not only survive but also thrive they must be creative, assessment based, have a handle on their business plan, be credible and substantive, focused, and open to guiding and making room for new leadership. In other words, they must be strategic in their endeavors and be outcome oriented in their approach. A solid and streamlined agency has a higher ability to express their mission and recruit new members and leaders. How an agency recruits these leaders presents an important issue for the Jewish community, and one that I will explore in depth in this study.

The understanding of board responsibilities has evolved over the past century. Board member characteristics that were once necessary for success have changed. Success is achieved through clarity, strategic action, and self-reflection. Many organizations have yet to enact these necessary changes. If they are to effectively engage new members, they must understand their role, the needs of these potential members, and open themselves to their presence. This is particularly necessary as agencies look to engage young professionals, as this demographic is different from generations before them.

### **Chapter III: Understanding the Generation**

Engagement of young professionals (Generation Y, generally referred to as those born between the 1970s and the 1990s), while a time consuming endeavor, can have positive results for agencies. When agencies actively seek and positively engage young professionals they are ensuring the next generation of leadership. Young professionals provide energy and excitement to the work of nonprofits. The key to successful engagement lies in understanding the needs of this generation and working to meet those needs.

The literature on this generation of young professionals is varied in what it says about their needs and desires but it does point to one clear fact: their needs are radically different than generations before them. Tsvi Blanchard in his article, "How to Think About Being Jewish in the 21<sup>st</sup> Century: A New Model of Jewish Identity Construction," explains that members of Generation Y are more able to participate in American life as insiders. The American society of the late twentieth and early twenty-first centuries is a "self-consciously pluralistic, multicultural society that understands ethnic or religious identity in terms of its profound commitment to individual freedom of choice" (Blanchard, 2002). This understanding of religious and ethnic differences was uncommon for past generations of Jews. Rather than an identity that was based in self-preservation, which necessitated communal obligation in order to survive, this new generation constructs their identities in conjunction to their positive relationships with other Americans. The need to prove one's allegiance is no longer necessary, allowing for freedom of choice and identity. Individuals, therefore, can choose affiliation that has meaning and relevance for them. Jack Wertheimer, for instance, pointed out that young

Jewish leaders fall into two categories of engagement: establishment or non-establishment. While establishment leaders choose to affiliate with long established institutions, non-establishment leaders feel a connection to Judaism but express it “through cultural participation rather than through philanthropy, advocacy, and defense” (Wertheimer, 2010, 3). The ability for connection through different types of programming and organizations is largely what sets this generation apart.

Generation Y’s transitional life stage explains how they engage in communal life, which differs from prior generations (Israel, 2001; Cohen and Kelman, 2005; Ukeles et al., 2006, Wertheimer, 2010). Most notably, the time between college involvement and marriage that Wertheimer refers to as “the odyssey years” (Wertheimer, 2010, 5) presents a significant involvement change from previous generations. For many Jews, college and marriage bring increased contact with the organized Jewish community. Between these events, however, affiliation and involvement diminish, and young Jews tend to be less engaged. In past generations the time between these two points was much shorter. As the age of marriage has risen this transitional period has expanded, leading to a drop off in communal involvement. As Israel and Cohen and Kelman point out, however, while involvement during this period may have declined, Jewish identification has not (Israel, 2001; Cohen & Kelman, 2005). While participants in Israel’s study point to an increasing disconnect in communal involvement, they continue to have Jewish identities. Recent studies have reached similar conclusions – that Jewish identities do exist for Generation Yers but they have a different feel from those of previous generations.

Generation Y Jews often describe themselves as being on a Jewish journey, but their expression of that journey varies from previous generations (Cohen and Kelman,

2005; Cohen and Kelman, 2008; Greenberg, 2006; Ukeles et al., 2006). Past generations were often interested in direct communal affiliation through dues payment to Jewish institutions, donations to specifically Jewish institutions, and participation in Jewish communal events. A 2006 Reboot study entitled “‘Grande Soy Vanilla Latte with Cinnamon, No Foam...’ Jewish Identity and Community in a Time of Unlimited Choices” confirmed,

despite their integrated appearance, we find that Generation Y Jews feel incredibly self-confident about their Jewish identities. In contrast to the survival ethic of many of their grandparents’ Jewish journeys, and contrary to the continuity fears of the 1990’s, Generation Y Jews are very positive about being Jewish (Greenberg, 2006, 15).

While some Generation Yers choose to affiliate in similar ways to their parents and grandparents, many seek differing ways to express their Jewish identity. For instance, in a study of Jewish cultural events in New York City, Cohen and Kelman found that participants are looking for involvement that is “ironic, funny, entertaining, contemporary, playful and empowering” (Cohen & Kelman, 2005). Many of the participants explained that involvement in these cultural events rather than involvement in formal Jewish institutions allowed for participation that was relevant to their interests and done without pressure, on their own terms. In a more recent study, Cohen and Kelman supported the understanding that Generation Y Jews have Jewish identities but express their Judaism in differing ways. Their look into the Jewish singles population – the population in transitional time between college and marriage – concluded that this population is interested in Judaism and has a Jewish identity, but their expression of their identity must be done on their own terms (Cohen & Kelman, 2008).

The nature of wanting involvement that is on one's own terms is a by-product of the individualistic culture of Generation Y (Greenberg, 2006; Sheahan, 2006; Ukeles et al., 2006). Americans today are living in a time where everything a person wants is only a click away. From the wealth of information and opportunities provided by the internet, to musical selections tailored to the listener through an iPod, to a Digital Video Recorder that allows the user to record television and watch it at any time, technology is geared to provide instantaneous, individualized results. It is not surprising then, that Generation Y – a generation well accustomed to this reality – would expect their Jewish programming and involvement to be provided in the same way. Many are looking for communal involvement and connection that fits their needs, passions and desires. These needs, Greenberg explains, are for a personal and informal expression of Jewish identity and a focus on a cultural connection to Judaism (Greenberg, 2006). The study performed by Ukeles Associates similarly finds that Generation Y Jews want a connection to Judaism that is both personal and informal (Ukeles et al., 2006). Peter Sheahan also describes Generation Y as lifestyle-centered, meaning they are focused on their personal experiences and “independently dependent,” insinuating that this is a generation that has learned to be self-reliant and individualistic (Sheahan, 2006). This is a generation that knows what it wants and expects to get it. That nature presents both challenges and possibilities when thinking about engagement of young professionals onto boards.

Many in this generation express a desire to connect to a community. While that is similar to previous generations, the difference with Generation Y is that they often do not feel tied to just one community. The 2006 Reboot study finds that this generation feels confident about their Jewish identity, although it is just one identity among many



(Greenberg, 2006). Living at a time when there are no restrictions to the ways that Jews can become involved in the society causes a freedom that was not always felt by the community. That freedom has translated into the ability to become active in multiple avenues, communities, and programs. The idea of limiting or centering one's actions within the Jewish community is no longer a necessity for survival, as it was once perceived. Shaul Kelner took an in-depth look at how Jewish foundations are engaging and educating young professionals. In response to the differences between previous generational ties to the Jewish community and this generation's he writes,

From one perspective, the shift from proclaiming unity to encountering diversity represents a sea change in the way that American Jewish institutions are creating practices through which Jews imagine and engage one another. From another perspective, however, the new emphasis on diversity can be seen as a reconfiguration of the 'We Are One!' ethos that many of the donors and directors of family foundations brought with them from the federation world (Kelner, ms).

Kelner points to the positives and the negatives of this shifting understanding in communal ties. Generation Y is causing a reconfiguring of the former communal ethos. The question then becomes how agencies are working to engage this new generation, the ways in which they are changing, and the results of that effort. The expectations of seasoned leaders need to change. Rather than trying to fit this generation into the mold of the past generations, instead, they should look at them and engage them as individuals. Young professionals need to have a reason to come around the table and become a part of organizations.

Organizations should look inwardly to gauge if they have the capacity and openness to welcome this generation into their leadership. If young people do come to the table, however, then they must be open to training, listening and evolving. As the research suggests, continuing to work under the same assumptions that described the

previous generations on the board will not allow for successful engagement of young professionals.

#### **Chapter IV: Methodology and Agencies**

Through this study I set out to research how young Jewish professionals, ages twenty-five to thirty-five are becoming engaged in Jewish nonprofit lay leadership. I wanted to gauge the successes and challenges facing this cohort as they enter into leadership roles and the ways that agencies are supporting them as new leaders. To begin my study I sent an email to over forty Jewish agencies in the New York metropolitan area asking them questions about their board, its demographic makeup and whether or not they were actively engaging young professionals. The overwhelming response was that this demographic is not present on the boards, but that organizations had a desire to engage them. From these responses and my knowledge of the community I chose two agencies as the focus of my research: UJA-Federation of New York, specifically their young leadership training program, Observership, and American Jewish World Service's new young leadership initiative, Global Circle.

The data that I collected from these organizations was qualitative. In order to ascertain the impact and success of these programs, I interviewed the professionals involved with the programming, participants at the programs who had taken a leadership role, and, in the case of UJA-Federation, some of the executives who worked with the program participants on the agency level. Professionals who manage the two programs helped me to identify interview subjects. Interviews were each between 20-60 minutes in length and took place either in person or over the phone between January and June 2010. I interviewed fourteen participants and staff who were engaged with the Observership program and four professionals and lay leaders associated with the Global Circle program. These interviews were analyzed to find patterns, similarities, and areas for

improvement in order to ascertain the aspects of the program that were welcoming, engaging and supportive to the participants.

Interview protocol for participants of both programs was similar. It focused on understanding how the participants came to the program, the factors that kept them involved and projections for their future involvement. In all of these instances new questions arose based on their responses. For the program professionals, interview questions focused on the history of the program, the goal of the project, the methodology used to create the program, and impact (or expected impact) on the organizations involved. When I interviewed agencies that were participating in the Observership program, the questions focused on the current board demography and responsibilities, the impact of having an Observer on the board, and the goals for the agency board in the future.

In addition to the formal interviews I also observed programs, collected data through informal discussions with participants at events and analyzed data collected by the program professionals through their follow-up with participants. At UJA-Federation, I was able to monitor three of Observership's Complimentary Learning Workshops through my internship in the organization. Through these observations I was able to speak with more participants and find other participants to interview aside from the ones suggested to me by the professionals. I had access to organizational documents and other necessary materials, including exit interviews with participants. As Global Circle was in its infancy at AJWS, I was given access to the documentation that guided the program and follow-up since the program's inception. Through these methods I saw the programs in action from different vantage points and more easily gauged their impact and success.

UJA-Federation and AJWS represent organizations of differing sizes and organizational structures. Some of their methods are similar, but the use of these two organizations is not meant to be a comparison. They both expressed a desire to engage younger leadership through their programming and have taken steps to work towards the goal of long-term engagement and board succession. They have done this, through different methods – UJA-Federation’s Observership program offers governance experience through observation, and Global Circle provides governance experience through non-board leadership. Both programs experience success and challenges with young professional engagement.

#### UJA-Federation of New York

United Jewish Appeal – Federation of Jewish Philanthropies of New York, Inc.’s (UJA-Federation) mission is to “care for those in need, rescue those in harm’s way, and renew and strengthen Jewish life in New York, in Israel and around the world” (UJA-Federation, 2004, 1). United Jewish Appeal of Greater New York and the Federation of Jewish Philanthropies of New York merged in 1975. Both agencies were established to care for and acculturate new immigrant Jews to New York and provide funding and advocacy to bring Jews from Europe to America. They also supported the creation of the new state of Israel. Today they have continued this work by providing “grants, capacity-building support and advocacy services” (UJA-Federation, 2004, 1) to over 100 network agencies throughout New York. An agency in the New York metropolitan area becomes part of the network when they accept a grant from UJA-Federation. They also work through “identifying new issues facing the Jewish community and mobilizing institutions

and resources to address those issues” (UJA-Federation, 2004, 1). In addition to its work in New York and the United States, UJA-Federation works to advance these goals in Israel and Jewish communities throughout the world.

In 2003-2004 an agency restructuring effort allowed them to reexamine their short and long-term goals. They identified the need to strengthen their efforts in promoting Jewish life both locally and internationally. The result of this long-term vision was the creation of four Commissions: The Jewish Communal Network Commission, the Caring Commission, the Commission on the Jewish People, and the Commission on Jewish Identity and Renewal. Each commission was tasked to fulfill the mission of the agency. They also increased their efforts to engage volunteer and professional leadership. This included the structure for their board, which was also re-envisioned in light of the agency restructuring.

The Board of Directors is elected annually based on recommendations from a nominating committee. They are responsible to “manage the affairs and determine the policies of UJA-Federation” (UJA-Federation, 2004, 5). They serve a one-year term in office, but are allowed to serve up to six consecutively. The nominating committee is charged with seeking a particular type of person for the board:

The Committee for the Nomination of Officers shall seek candidates who will further the primary objective of UJA-Federation, which is to forge the maximum unity of the Jewish community, enlarge the number and amount of contributions to the annual campaign of UJA-Federation and thereby enhance the services made possible by the funds thus raised... (UJA-Federation, 2004, 21).

The Board of Directors also convenes an Executive Committee responsible for governance between board meetings. In addition to the Executive Committee there are several significant committees. UJA-Federation’s four-commission structure is mirrored

in the committee structure. Each of these Commissions is led by a cabinet. The multi-tiered structure creates the opportunity for volunteer leadership at a variety of levels. Board positions, cabinets, and subcommittees each have a different giving level, as well as an array of leadership positions suited to different backgrounds and experience.

The ability to fulfill specific board duties is not all that is required of board members. The *Standards of Participation* set forth by UJA-Federation stipulates that board members must understand the mission of UJA-Federation and uphold it through their involvement; know that in order to fulfill its mission, the organization and board must work to raise funds; agree “to be educated and actively engaged in the world of that body and to attend its meetings regularly”; support the agency through a significant gift; and get involved in financial resource development efforts (UJA-Federation, 2004). UJA-Federation policy stipulates that board members must be Jewishly literate and active in the greater community, understanding its nuances and issues. *The Standards of Leadership* also states that leaders in the organization must embody *Tzedakah* (Righteousness), *Tikun Olam* (Repairing the World), *Pidyon Shevuyim* (Ransoming of Captives), *Kol Israel Arevim Zeh-la-Zeh* (All Jews are Responsible for One Another), and *Gemilut Chesed* (Acts of Loving Kindness). Fulfilling responsibilities such as creating future leadership and serving as a role model are expected roles for board members. Cultivating future leadership is a challenge that UJA-Federation has worked to meet.

In 1993, as a result of the desire to increase the number of donors, lay leaders, and volunteers involved with the organization, UJA-Federation created the Human Resource Development Strategic Planning Implementation Task Force. This task force evolved

into what is today known as the Volunteer and Leadership Development Division (VLDD). Following the 2003-2004 strategic plan and subsequent restructuring, this division assumed an increased prominence. VLDD's mission is to "develop and implement meaningful initiatives to engage and educate volunteers and lay leadership..." (Birnbaum et al., 2004, 7, as quoted from "Looking Forward: Building Communities" by John Ruskay). In 2004 the department commissioned a study from the NYU Wagner Graduate School of Public Service. The Capstone project, entitled "Engaging Lay Leaders: The Role of Training and Education at UJA-Federation of New York," was commissioned to identify "strengths and gaps in service within their current lay leadership development structure" (Birnbaum et al., 2004, 5) and offer possible suggestions for improvement in their volunteer training and education. The team found "there is no common linear path for the development of lay leadership" (Birnbaum et al., 2004, 21) as there are many points of entry into the organization. Indeed, within the organization there was no set definition for the role of lay leader or shared understanding of qualities lay leaders should possess because each division used lay leadership in different ways and valued different traits. As a result many lay leaders expressed feeling untrained and unprepared for their roles in the organization.

To alleviate these issues the Capstone team suggested that the department create a customer-centered approach, which explains the "benefits of involvement" (Birnbaum et al., 2004, 37) and clarifies the objectives of skill building and engagement for lay leadership. They also suggested a focus on improving and standardizing educational training programs to allow for professional adaptations based on needs and increasing opportunities for access to training (Birnbaum et al., 2004).



Since this study was conducted, many of the suggestions put forth in the Capstone have been implemented. Susan Kohn, the Executive Director of VLDD, explained that the department has made a conscious effort to separate programs that are engagement-focused from educational ones so as to not confuse them. They now work in collaboration with Financial Resource Development [the fundraising department] to customize learning experiences. The department also created more “on demand training” (Susan Kohn, interview), making individualized training digitally available for specific commissions and divisions.

This study and the changes enacted as a result of its findings suggest that UJA-Federation has been concerned with how they engage and support their lay leaders and that they are committed to change. They are cognizant of how they appear to potential donors and lay leaders, especially those belonging to the younger generation. They have developed many approaches and openings for cultivating new donors and leadership, creating many paths for entry with no standard trajectory for involvement.

One of these possible entry points into the organization is through the Emerging Leaders and Philanthropists Division (ELP), the result of a restructuring from the previously named Young Leadership Division. This division seeks to “offer young and successful philanthropic individuals and couples the opportunity to participate in the incredible global endeavor of renewing and strengthening the Jewish community in New York and around the world” (UJA-Federation website). Young professionals are first invited to attend an upcoming program, many of which are social and volunteer based. They then meet with a professional fundraiser who gets to know them and suggests ways to be involved, based on their interest, profession and giving capacity. In general,

professional trades divide the department. Each division offers opportunity for leadership and engagement. Those who want higher engagement are invited to join the ELP Strategic Council, the body that helps to make decisions for ELP with fundraisers.

The few who are interested in engagement on a deeper, direct board experience level, are directed to participate in the Observership Program, an initiative of the Volunteer and Leadership Development Division. Through this program, participants give a minimum gift of \$1500 to UJA-Federation and are placed for a year on either a network agency board, such as Camp Isabella Freedman, The Educational Alliance, and Hillel, or a task force within UJA-Federation. During the year they observe a board by attending board meetings and sub-committee meetings as a non-voting member. Throughout the year they also participate in Complimentary Learning Workshops through UJA-Federation, which include an orientation at the start of the year, a session on Jewish ethics in board governance, meetings with senior UJA-Federation leaders, and other programs. Participants are given a mentor from a group of former Observership participants. At the end of their experience on the program, Observers receive guidance as to next steps in their philanthropic career (UJA-Federation, 2009).

The program was created to “become a stepping stone for young leadership to be introduced to governance at the nonprofit board level and to test the waters before they have to make a full investment in it” (Susan Kohn, interview). In an interview Susan Kohn explained that the program has produced results in the organization. In tracking former Observership participants, they have learned that the gift given by the participants to UJA-Federation grows exponentially over time and often at a rapid rate. As a result of participation in the program, participants begin to engage in other places, such as ELP,

their trade divisions, and further within the network of agencies, while at the same time expressing more of a connection to UJA-Federation.

Participants themselves are recruited in a number of ways, including recommendations by fundraisers, colleagues, past and current Observers, mentors and agency executives. A small percentage come across it themselves through the website or word of mouth. Interested candidates fill out an application and go through an interview process, in which the program director ascertains their interests and availability. Accepted participants, which include the vast majority of those who apply, are then placed on a board or task force and given a mentor. Placements for the year are done in conversation with both the participants and the agencies. The program prides itself on matching based on interest to maximize the experience for both participants and boards (Hannah Toce, Senior Program Executive, Interview).

UJA-Federation understands that different individuals connect in different ways. The plethora of activities, programs, and divisions is a testament to this understanding and their organizational size. They are committed to finding ways for Generation Yers to connect and become involved, hopeful that this contact will lead to future engagement.

#### AJWS

American Jewish World Service was founded after Lawrence S. Phillips traveled to Honduras and El Salvador through Oxfam, an international relief agency. After experiencing the work done there by different religious organizations he felt “it was of critical importance that a Jewish agency should also exist, both as a matter of pride and as a fulfillment of Judaism’s fundamental tenets of *tzedakah* and *tikkun olam*” (Rivkin,

1989). This trip was taken in the early 1980s and the organization was founded not long after, on May 1, 1985 in Boston, Massachusetts.

The organization was originally established to be the “first American Jewish organization dedicated to alleviating poverty, hunger and disease among people across the globe” (AJWS website). In an article printed in the LA Times, Phillips explains why he saw the need to create such an organization: “I was concerned that the absence of this kind of commitment was also one reason why a great number of Jews find it difficult to identify with the organized Jewish community” (Rifkin, 1989). His goal was to create an opening into the Jewish community for those who are committed to this work.

The current mission of AJWS speaks to the organization’s original goals but with more emphasis on how they fulfill their work:

American Jewish World Service (AJWS) is an international development organization motivated by Judaism’s imperative to pursue justice. AJWS is dedicated to alleviating poverty, hunger and disease among the people of the developing world regardless of race, religion or nationality. Through grants to grassroots organizations, volunteer service, advocacy and education, AJWS fosters civil society, sustainable development and human rights for all people, while promoting the values and responsibilities of global citizenship within the Jewish community (AJWS website).

The agency is committed to four main pillars: fighting hunger, disease, and poverty in the developing world; offering service volunteer opportunities; advocating for global change; and education. Each of these four pillars translates into departments in the organization.

The Board of Trustees’ role involves “the entire charge, control and management of AJWS, its property and business and shall have the responsibility for establishing and implementing the policies, goals and programs of AJWS” (AJWS By-Laws). The tenure for trustees is initially one year but can be extended for two consecutive terms of three years each. The Board of Trustees includes approximately six committees: “an Executive

Committee, a Board Governance Committee, a Finance and Administration Committee, an Audit and Risk Management Committee, a Grants Committee and one or more program committees” (AJWS By-Laws).

For individuals to be nominated to the Board of Trustees they must fulfill the following qualifications: “leadership in the business, professional, arts or Jewish communities; major personal or financial contributions and commitments to AJWS and its activities; international development expertise; and membership on an AJWS standing committee” (AJWS By-Laws). They are required to regularly attend meetings, make AJWS among their top and most significant philanthropic destinations, and function as an ambassador of AJWS. Travel with AJWS is highly encouraged (AJWS, Board Member Responsibilities). The goal is for board members to adequately represent the agency.

At the time of my research the board was in the process of restructuring. Riva Silverman, Director of Development, explained that while the board does not currently possess a feeling of empowerment, the hope in restructuring is that room will be created for a more empowered model of involvement. The board work, she explained, is being done ahead of the agency restructuring. “...The notion was you have to have a fully engaged, empowered board if you are going to do strategic planning that makes sense” (Riva Silverman, interview). AJWS has hired a consultant to assist them in the restructuring process.

In May of 2009, AJWS launched their young adult initiative, Global Circle. Silverman explained that the initiative was started for two reasons. The first was “from the self interest perspective, wanting to be sure that we had the next generation poised to take over leadership” (Silverman, Interview). Silverman described the current leadership

of AJWS as younger than most other Jewish organizations but still averaging fifty to sixty years old. They wanted to ensure that a younger cohort of leaders would become involved and stay active, taking leadership positions within the agency in the future. The second reason Silverman states, is that,

Anecdotally...we were finding...there were...[young professionals in their] 20s and 30s working in Wall Street, Law Firms, [etc], who reached that threshold of \$1000 [the minimum donation to receive a follow-up phone call from AJWS fundraisers] and when the staff member called them to thank them, they would say, 'Do you have something for people my age? I've gotten invitations to [events] but it really doesn't feel like my cohort will be there and I'm looking for a community of like minded people who care about the same things.' So we were hearing from donors that they wanted something more (Silverman, interview).

Due to the request of their donors they sought to cultivate interest in AJWS with activists, donors on all levels, and future leadership.

To accomplish the task of creating what would become Global Circle, Jenny Goldstein, Senior Development Officer, contacted young major gifts donors individually, searched internally, and networked to create a base list of interested individuals. At the same time she also conducted a scan of young leadership development programs hosted by agencies in the New York metropolitan area. She used the information about their programming as a basis to organize a steering committee for this group, and together they began to discuss and plan a future endeavor.

Goldstein worked from a model of full empowerment. She saw the group as leading one another as opposed to being staff driven. Each event has been planned in conjunction with staff and a leadership steering committee. From September until December 2008, the young leadership committee was formed, comprised of fifteen individuals who met on a monthly basis. During this time they were tasked with envisioning the future of this group. They worked on the name of the initiative, created a

marketing and communications plan, organized the first few events, and raised \$50,000 for AJWS programming.

While the initiative was in the initial planning stages, the *Draft Mission Statement* read:

The Young Leadership program...will identify, cultivate and train the next generation of leadership for AJWS. We aim to inspire and engage young leaders through various initiatives, and to build a community of individuals who are committed to AJWS' values and long-term future (Goldstein, 2009).

After the first year of involvement, the program identified goals of 80% retention of the leadership into the following year, cultivation of ten young adults to involve in the programming, the holding of 2-3 events in May and Sept, participation between 60-120 attendees each, and increasing fundraising within the leadership group to \$100,000 (Goldstein, 2009).

As the group continued to meet and define themselves, the mission statement evolved into Global Circle's *Statement of Purpose*, which states that the group is "an emerging community of young professionals dedicated to supporting American Jewish World Service's mission to alleviate poverty, hunger and disease in the developing world. AJWS Global Circle aims to inspire and engage through personal philanthropy, social events and social justice initiatives" (Goldstein, 2009). The group met and exceeded the goals set in 2009. The new priorities for the 2010 year include: increasing their reach of marketing to involve more connection to their facebook group, listserv members, website hits, email open rates, and involving more men in programming and leadership; increasing education and training for committee members about Global Circle and AJWS; increasing donations; maintaining quality programming; and launching an advocacy component to the group (Goldstein, 2009).

This group expanded and grew into the Global Circle Steering Committee. In the *Steering Committee Responsibilities and Expectations* packet, the committee set out its explicit goals for leadership. Steering committee members must understand AJWS and be advocates for the agency, they must make a significant gift (but this gift is not explicitly stated), they must fundraise for the agency, they must make a commitment to participate in at least 75% of meetings and events, and they must serve on a sub-committee (Goldstein, 2009). Each of these requirements mirrors the requirements for the AJWS Board of Trustees. Unlike the AJWS Board of Trustees, however, the Global Circle steering committee does not require a minimum gift to secure participation.

The steering committee decided to limit themselves to no more than 20 members with term limits of two years, renewable twice. Steering committee members are tasked with cultivating new leadership by nominating individuals, keeping an eye to the diversity of the steering committee, and working to ensure that members are of varying genders, ages, occupations, and denominations within Judaism (Goldstein, 2009). Global Circle sub-committees include: Executive, Marketing, Fundraising, Programming and Nominations. It was created in this way to mirror the board structure of AJWS (Goldstein, 2009).

Global Circle launched their first event in May of 2009. Goldstein explained the group wanted to start with a large event as a catalyst to building the listserv and growing involvement. They started with a program held at a Chelsea art gallery, featuring work by photojournalist Ron Aviv, followed by a question and answer session with him and a reception. The event was free for participants. Following the success of this event, Global Circle held a house event where two former American volunteers in Uganda



spoke about their experiences and cocktails were served. Another event was the screening of the documentary, "Reporter," after which New York Times reporter Nick Kristof and Ruth Messinger held a question and answer session. This event had a fee of \$25. Many other events have followed including a fundraiser that offered tiered seating prices, which allowed young professionals to attend at a level appropriate for them. Goldstein explained that events were chosen based on connection to AJWS's mission and the content provided. She has been committed to providing programming that is both social and educational, with costs that are reasonable.

There has been a tension from the time of Global Circle's launch regarding the group's relationship to the larger agency and what the future will look like. In all of the planning that has gone into Global Circle it has been a priority to create a direct relationship back to the agency as a whole. Jenny Goldstein explained, "It's always challenging because in some ways it is a separate offshoot. We [Global Circle] have a little bit of a different branding, a different name, but we've made it clear that the whole goal of Global Circle is to further the mission of AJWS" (Goldstein, interview). Silverman explained that the steering committee and staff spent a lot of time ensuring that materials for both Global Circle and AJWS have the same look and language. The challenge was to give Global Circle its own feel but make it very clear that it is part of AJWS.

Global Circle is so connected to AJWS, in fact, that the language of what to call the board of Global Circle and their rules for conduct became an issue. Language, Goldstein explained, is extremely important (Goldstein, interview). The board of AJWS did not feel that an agency should have two boards, so they requested that the leadership

of Global Circle take the name “steering committee” as a way of avoiding confusion. The steering committee itself is not allowed to have by-laws because the name “by-laws” refers to a level of responsibility that the Global Circle committee members are not required by law to uphold.

The future integration of Global Circle board members remains a question. When these leaders find themselves with the financial capacity and desire to take on a board position within the agency, will the agency be able to offer empowered engagement? AJWS has begun to answer this question through their restructuring process, but the results of this change will not be felt in the near future. The goal is to have a few spots on the AJWS board each year designated for former Global Circle participants. The question remains, however, if the agency has the capacity to involve the board members at or near the engagement level that the Global Circle steering committee involvement provided.

Both UJA-Federation and AJWS have struggled to find opportunities of engagement for young professionals. They have met that challenge through work and experience. The question for the future is how to integrate participants onto the agency board to promote their future leadership. Both agencies are creating or have created answers to this question. But the initial steps for engagement of young leadership, as both agencies have learned, lies in understanding how this new generation functions and engaging them in a way that meets their individual needs.

## **Chapter V: Findings**

In researching the reasons that young professionals become involved in lay leadership, I spoke with program participants on Observership and the steering committee of Global Circle, professionals who run these programs, and staff who work with boards that engage young professionals through these programs. While these two organizations are very different the research into these organizations gives a clear view of how differing missions attract young professionals. Jack Wertheimer (2010) found that Jewish leadership engagement fell into two categories: establishment and non-establishment. Establishment leaders are those for whom the protective mission of many long-standing institutions resonates. These leaders are drawn to missions such as the one espoused by UJA-Federation of New York. Through her research, Sarah Bunin Benor found that these leaders often come from positions in the for-profit field (Benor, 2010).

In contrast, non-establishment leaders tend to be more drawn to universal causes and questions of personal meaning. AJWS, with its highly universal mission and work, is a wonderful example of a less traditional Jewish institution (Wertheimer, 2010). Benor found that non-establishment leaders often work in nonprofit positions (Benor, 2010). Like Benor, I also found many similarities between the young leaders in UJA-Federation and AJWS. This, I believe, points more to the nature of those who choose to be involved rather than the institution itself, as the participants in both programs are a self-selecting group. In this chapter I explore my discussions with these individuals, noting how they came to the organizations; why they became involved; successes and challenges on their boards; their thoughts on the programs; and future involvement projections. Their experiences offer take-away understandings that will be helpful to agencies wishing to

engage this population, whether in establishment or non-establishment organizations or those that bridge the two spheres.

### **Coming to the Organization**

When asked why they became involved in their programs, participants gave three main reasons. First, they described involvement as being part of their nature. A few explained that their family taught them participation by example. They were exposed to familial involvement in the community and philanthropic endeavors. They also describe themselves as wanting to get involved and help those in need. This, one participant explained, was part of her nature.

Many participants also reported actively seeking out participation. This act of seeking out the organization was empowering for the young professionals. For some, this was the result of the previous reason for involvement. Since involvement in the Jewish community and philanthropy were part of their nature, it only seemed fitting to them that they would be involved on the board of an organization. One participant explained,

I...have always been very involved in philanthropy and Judaism. When I moved to New York I learned all about the UJA [-Federation] and the amazing things that UJA does and I thought...that's an organization that's mission is very much aligned with my own personal mission, and I wanted to get involved.

This theme of involvement resulting from belief in and support of the organization is one that came up in other discussions as well. Another participant described coming to the organization because he valued the way the organization was run.

The third and most prevalent reason listed for getting involved in organizations in the first place was due to being recommended or asked to participate. These recommendations came from family, friends, staff of the organization and other involved lay leaders from the organization. Some of these participants had not thought of or

known about the programs but when they were asked or recommended they explored the possibilities in greater depth. The support of the person who recommended or asked them to participate stayed with some of the participants and provided an added layer of comfort. It allowed for someone they could speak with as their involvement increased.

One participant explained:

I started to do the panels [a UJA-Federation task force committee that reviews grants given by the organization], and I sat on some great panels. I looked at the Y and a couple other ones as well and through that I met some amazing people. I wasn't even aware of the existence of the Observership program at the time but was nominated by...[a staff member] to be a part of the Observership program through my work on the panels. She got to know me really well and thought this would be a great fit for me, and so I decided to take her up on it...

This same participant explained later in her interview that the relationship with the professional from UJA-Federation who nominated her did not stop after she became involved in this other program. At one point this participant chaired a program at her Observership placement and the professional attended the event. She also spoke of a situation that occurred towards the end of the year and her ability to turn to this professional to seek advice on a possible solution. This experience tied her closer to the individual and as a result, UJA-Federation.

### **Why They Stayed Involved**

Entrance into the organization is only the first step. To keep them involved agencies must engage them and give them reasons to be active. The group of participants I spoke with listed many reasons for participating in the programs. The strongest reasons shared by the participants were: a desire to make an impact; a connection to the organization, group and people involved; wanting to get involved with something outside of work; and a desire to have experience with a nonprofit board.

*Desire to make an impact*

Participants with both organizations wanted to know that their work was making an impact on the organization, the board, and the constituents with whom the organizations worked. Some had been involved with organizations in the past or other parts of the same organizations and were looking for involvement that was more concrete. One participant of the Observership program was also a member of the Young Wall Street Executive Council, a council within the Emerging Leaders and Philanthropists Division of UJA-Federation. When asked to describe the difference between these programs he explained:

The primary objective of Young Wall Street is to raise money for UJA[-Federation], and the service or experience they provide is access and networking and the ability to sort of have young people start getting some sort of leadership development...the board is not a fundraising organization. It's an agency that helps people. The people on the board are there to hopefully guide and make decisions to help the agency achieve its goals of helping...I think they have more of a direct impact...

Another Observership participant also discussed a desire to have an impact on a board directly. When asked why she chose to participate in the Observership program she said:

I thought it would be a great way for me to have an impact on a particular agency depending on where I was placed...if I found something I was passionate about I'd love to have an influence on that and be able to...provide feedback and help out with board decisions and things of that nature...

The participants I spoke with involved in the AJWS Global Circle steering committee cited wanting to make an impact as well. Director of Global Circle, Jenny Goldstein, explained that she works to create a feeling of empowerment for participants. Both of the participants I spoke with expressed that this was one of the reasons they continued to be involved and take on more roles within the group. One participant elaborated:

...there has been a lot of room for feedback, a lot of room for discussion. Maybe in part it is just because I've taken the initiative to talk with Jenny or to talk with Dina [lay chair of the program] and tell them what I think, but the conversation is definitely open and they invite feedback and they want to know what people want. It has been cool to be a part of it from the get-go because there is room to just play around.

This participant became involved through a friend who experienced a trip with AJWS.

After her first event she sought out involvement and was engaged with the board from almost the inception of the program. She is now chairing the fundraising committee for Global Circle. This ability to impact the nature and direction of the group has been a key reason she remained involved and took on other leadership roles.

#### *Connection to Organization, Group, and People*

The feeling of connection was a strong and motivating factor for why participants became involved. Some of the participants discussed being drawn towards involvement because of their belief in the organization's mission and the way the group was run. One Observership participant noted:

...as time went on and I met more people there, saw what they did, saw the way that programs were run, like I said, other not-for-profits that I touched or reach out to...nothing is as well oiled a machine as UJA [-Federation]. It really is, and I understand why...for some that doesn't rub them the right way. But like I said, for me, I am a business-minded person. I'm very pragmatic and I think that there is no reason why a nonprofit shouldn't be run like a business...That's what it is that appeals to me about the UJA [-Federation].

A disorganized organization, as some Observership participants experienced through their placements on network agency boards and task forces, was a factor that turned people off to involvement.

One Global Circle participant connected to the group because it was designed specifically for her age demographic and in many ways was appealing to her. She appreciated the focus that Global Circle had on advocacy and education. She felt that

these programs were designed with her in mind: the pricing of the event fit her budget, programs were offered at times she was available, and programs were interesting and appealing to her interests.

But most importantly, people stayed involved in these groups because they felt connected to the people involved. Many participants on both programs spoke of enjoying being with “like minded people.” One Global Circle participant explained that Global Circle provided,

...a group of honestly cool and hip people who were in my age range who are also doing things professionally that impress me and that make me want to know them for a long time because I feel like they are going to be influential, important people but in industries that I particularly am interested in...They are Jewish, they are committed to their Jewish identities, but there is this whole other element of networking and social environment that really connected with me the most...

The ability to network was a powerfully motivating factor for participants of both programs, a point that is supported through Benor’s findings (Benor, 2010). One Observership interviewee discussed his understanding of why his friends became involved. A main reason he cites is the ability to network, both with young professionals and seasoned leaders.

I look at my friends who are Jewish and not Jewish and the charities they get involved with and there’s definitely a certain social implication for why they pick one versus the other, maybe. You know one organization throws really awesome events and they want to be a part of it and they also like what the objective of that organization is. Or in some cases it’s networking. You meet like-minded individuals in the same profession and you get together and you do better for the community but at the same time you’re interacting with each other and that could one day benefit them professionally.

Other participants spoke about feeling a connection because the professional they worked with was engaging. With the Global Circle program specifically, those I spoke with revealed that the professional who runs the program reached out to them



individually, making a connection that allowed them to feel heard and supported. This feeling extended beyond the Global Circle program to the Observership program as well. Participants in the Observership program also spoke about the professional who ran the program as being an engaging personality who provided support as they navigated this new experience.

### *Involvement Outside of Work*

For those interviewed, a third shared reason for involvement was a desire to get involved with something that was outside of their professional obligations. Schedules for young professionals can be very demanding. These participants chose to become involved outside of their work because while the experience was appealing to them it also fit within their schedules. The pull of it being an activity they were choosing to do rather than an obligation was also a driving factor in involvement. One Observership participant explained that he sought out involvement because he was looking for something more in his life,

I'd spent nine years on Wall Street...there are some firms that were very good about encouraging their employees to do charity work, to do things. I was not at one of them. I was at one that, you know, you do what you did during the day and what you did at night was your own business. You know, not that there's anything wrong with that, but saying that it meant that I really did spend a very long time working very hard at a goal that really then and everyday I questioned what it is that I'm doing in my life. You know, I guess it [involvement] was a kind of existential satiation for me.

This participant sought out involvement in UJA-Federation and the Observership program as a way to fill a need that was not being filled by his professional work.

The number one response as to why they became involved, however, was that participants were looking for ways to be involved outside of work that would help others, but in a way that allowed them to use their professional skills. Among participants in

both programs, there was a shared feeling that their professions gave them something that they could offer. One Observership participant described a situation on the board she was sitting on in which they were undergoing a branding campaign. Marketing, as it turned out, was her profession, so she felt she was able to be of use to the board. She explained:

...for this year, they [the agency] had received funding from UJA [-Federation] to do a brand and logo exploration. So when the topic came up I actually presented what a brand was and what a logo was during one of the meetings, just to kind of share some of my experience in that area with how it fits in to their organization...I really enjoyed being able to share my professional expertise with the organization.

On the flip side, one participant described a situation in which he was placed on a board but did not feel that his skills and profession were what the board needed. As a result he felt out of place.

#### *Experience with a Board and Nonprofit Organization*

A final recurring theme in the interviews was that many participants wanted to get involved so they could learn more about board structures, functions, and the work that nonprofit agencies do. During one interview, an Observership participant explained:

I just thought it would be interesting to sit on a board of a nonprofit organization. I didn't really know anything about how nonprofit organizations run. I didn't really know anything. Obviously I've heard of Boards of Directors or board members and things like that, but I didn't really have any concept of what that entailed and I was just kind of curious for my own personal growth.

The Observership program provided, for this participant, a wonderful way to experience the workings of a board without making a long-term commitment to the organization.

The desire of wanting to understand the inner workings of a nonprofit organization was mirrored by another Observer participant, who explained that he did not work for a

nonprofit organization, so he saw inherent value in seeing the program he worked on evolve and take shape.

Aside from wanting to learn how nonprofits function, a few participants expressed that as donors, they were interested in seeing where their money was going. They noted that their involvement on the board allowed them to see that in a very concrete way. The involvement, then, became more involved than just writing a check.

### **Board Involvement – Successes and Challenges**

When asked to describe their experiences sitting on boards this past year, participants of both programs expressed three main themes that they felt were successful or challenging: support, board function, and participation.

#### *Support*

The most positive experiences were ones that were well supported. The participants on these programs valued the connections they made with board members and program staff. The more of an individualized connection the staff and board made with them, the more they valued their experience. In some instances with the Observership program participants were provided with mentors on the board to help guide their experiences. In others they were well supported by the board leader, who took the time to explain the board, the board members and the board meeting experience. One Observer described one such informal experience he had with the chairman of the board. The meetings were held at the agency, which is far from Manhattan. The chairman would drive this Observer and during that time would talk with him about the agency and his role, taking the time to orient him about what to expect and how to get

involved. These informal conversations allowed the Observer to feel connected and involved in the agency.

Boards showed their support of young professionals in other ways as well. Some boards provided orientation sessions for Observers and new board members that helped to explain the agency, board process, and what to expect from board meetings. Other agencies provided their young professionals with a mentor who was in charge of helping to acclimate them. In each instance, the individualized attention by both staff and board members aided in participants feeling connected and supported in their roles.

The board experiences that were described in negative terms very often were situations in which the participants were not supported by the agencies. One Observership participant described her experience with a board in which no one approached her,

...I didn't feel that anyone went out of their way to either get to know me or why I was particularly interested in being an Observer or sitting in on their board. I certainly didn't feel unwelcomed, but it was a kind of take it or leave it kind of thing. They didn't care that I was there, that is I don't think they really went out of their way to include me in things or incorporate me in any way.

There were also some instances in which the board or agency tried to reach out to young professionals but fell short in their attempt. A big issue mentioned by Observership participants was that often they were given a mentor by their boards but didn't know how to utilize them properly. The result was little follow-up from both parties and feelings of alienation on the part of the young professional,

I sort of felt like they didn't really reach out to me. They were very receptive to everything I wanted, and they were sort of welcoming in that sort of general sense. I mean I met with the CEO before I even started...I wasn't on the emails. The suggestions were not put to me, so it was all on me, which I certainly could have done more, but it was such a big organization that you don't really know where to start. There was no internal guidance.

One participant, when speaking at a final session for the program, noted that the staff made an effort to reach out, but to him this seemed forced. In speculating the reasons why the staff was so welcoming he said, “I think they [the staff] associated that ‘you are a board member so you determine what we get paid so we must be nice to you and you’re closer to our age than most board members.’” Sheahan and Kaunfer speak to the necessity of authenticity in their work, explaining that if an effort seems forced it will be a turn-off to young professionals (Sheahan, 2006; Kaunfer, 2005).

When asked what they would like to change most about the programs, many participants discussed wanting a mentor who would take them through the experience on the board, answer questions, and help them to find the questions they should have asked but did not know how.

#### *Board Function*

The young professionals viewed smoothly running boards positively. The participants described that these boards were able to accomplish tasks quickly and efficiently. One Observership participant explained what a functioning board and program do for her participation:

...I think the success of engaging people, like you don’t want to be a part of something that is floundering as it gets off the ground – that doesn’t feel promising. But I think even after the very first event I went to that they know what they are doing, even if they are figuring at least a vision of where they’ve wanted to go and that’s been huge in keeping me engaged...

Boards that are able to function well are able to accomplish more. The ability to do this is a motivating factor for young professionals’ involvement. In the words of one participant,

My experience was really smooth. It was a very well run board. Financial problems were not...there were no financial problems any more than wanting more money. [But things went relatively smoothly.] The staffers, the executive staff all were very respected, very experienced. They did a good job so there was no real crisis management.

Another Observership participant described her experience on what she defined as a well-run board:

The people [board members] know the organization inside and out. They are very committed to the cause. They ask very thoughtful questions. There's a great rapport among the members and they are comfortable asking questions about each other's specialty but at the same time they do keep it light. There is always laughter during the meetings. They also run very well – they start on time, they end on time, they follow the agenda, there's a good turnout.

This particular Observership participant described feeling welcomed onto the board as opposed to feeling as an outsider. She responded favorably to a board that respected her time, as did other participants on both programs. In these instances they described these boards as functioning well.

Global Circle participants reflected this feeling about the positive aspects of a well functioning board as well. While their program was about active board engagement rather than observation, they described enjoying the experience because their time was valued and meetings were done in an efficient manner. They were encouraged to give ample input and were integral in the planning process.

While positive board functions attracted young professionals, disorganized boards turned participants off. One Observership participant described not gaining much from his experience sitting on the board of a UJA-Federation network agency board:

I didn't learn much by sitting in meetings because they are so disorganized. They were looking for new board members to be like, 'get this thing into shape, show these people how to sort of organize themselves and care about what's going on here.' I felt that they [the board members] were just in it to give their donation and put something on their resume.

While he got involved in the organization and helped to create a change, he expressed wanting to sit on a board where he had the opportunity to observe how a well-functioning board works.

### *Participation*

Active and invited participation on the board was a drawing factor for program participants. Members of the Global Circle steering committee described the level of empowerment they enjoyed as energizing for them. One of the participants described his enthusiasm at being a part of the project from the get-go. The ability to be a part of the program's creation and be integral in the process is something that many of the participants from Observership expressed enjoying or wishing they had with their board involvement.

One participant on the Observership program was invited to take a larger role on the board by leading one of the agency's events. She described the way she was asked to chair the event:

I had a tremendous experience...they [the agency director and the president of the board] said, "You know what...you're new to the board. Why don't you plan this event?" And they gave me a buddy to plan it with who actually was a member of the board and was formerly with the UJA [-Federation]. And we decided to do it together. And that's basically how the decision was made...it was really a great experience to put that together and be a part of that...helping to plan the event was actually really instrumental in me feeling like I was a part of the board and becoming part of the whole process.

Other program participants were also given leadership roles on the board, and it helped to involve them more in the program and make them feel more invested in the organization.

As was noted previously, skills-based involvement was highly valued by participants. They enjoyed the opportunity to put their professional skills to use in a new

environment. It was this involvement that played a large role in allowing them to feel they were making an impact on the agency.

A tactic that some larger boards utilized was to encourage their Observers to participate in smaller subcommittees. Where the larger boards seemed overwhelming to some participants, these smaller subcommittees made participants feel more open to participation. At the final wrap-up session for the Observership program, two Observers on the same board were discussing their involvement. Both responded that they did not feel comfortable participating in the larger board meetings. One elaborated, saying, "I am an outspoken person, and I wouldn't have spoken in that venue. I would have stayed afterwards and said, 'Can you explain this.'" However, one of them sat in on a subcommittee meeting and had a different experience:

...they did this role play thing and I had to play [a part]. I had to pretend that I was a grandmother and seventy and it was actually pretty fun. But that was the only time I actually really participated.

Some Observership participants wanted an experience where they could just observe the board and did not seek involvement. One participant described himself as "very much an observer." He described not taking an active role but feeling as though he learned a lot about the organization that way. In the final wrap-up session, this sentiment was echoed by a few involved in the discussion.

Others, however, felt that they were on the outskirts of the board, a feeling they expressed negatively. In the words of one of the participants,

It was a very big board. So if you sat next to a few people they were nice and introduced themselves and things like that. But it wasn't as though I really met and got to know all forty people who sit at these meetings. It was overall a positive experience but I don't think I was particularly integral.



Two other participants who sat on smaller task forces (committee associated with one of the agency's four grant making commissions) told of similar experiences. One explained that on the task force she observed, she mostly watched the meetings because she did not have experience with this work. She also noted the significant age gap that existed between her and the task force members. Another participant on a smaller task force mirrored this sentiment, describing the group as having a set way of working and reporting that she did not feel as though she was able to contribute to the task force discussions.

### **Future Involvement**

Many of the participants interviewed saw themselves involved in lay leadership in the future. For these participants, their involvement in the programs led them to want to take more active roles going forward. Some Observers chose to stay in the program to experience a different type of board in the coming year. Others joined the board they observed. One participant joined his synagogue's board as a result of participating in the program. Both of the Global Circle participants have remained active in their leadership roles. From both programs, a number of interviewees described themselves as being more active donors, meaning that they give more money to the organization.

For each of the groups I interviewed timing of the events was key. The busy schedules of the participants were at times a barrier for their participation in the group events and the board meetings. One of the Global Circle participants speculated that one of the reasons people do not get involved is their desire to move ahead in their careers and the time that takes. Others discussed that as young professionals, they do not know what their availability will be in the future, once they settle down and have a family.

Some of the participants interviewed said they wanted more hands-on volunteer opportunities. One participant said that she wanted to make sure that with any board she sat on, she would also be a regular volunteer to the agency. Another expressed not being sure if she wanted to participate further with lay involvement because she wanted a role that was more hands-on and less fiduciary.

### **Findings Summary**

While the two programs were different, the findings point to many similarities as to why and how individuals became involved in lay leadership. The participants interviewed became involved in the organization because involvement was part of their nature, they sought out the organization, and they were recommended or asked by someone. They stayed involved because of a desire to make an impact, a connection to the organization, the people involved, wanting to get involved with something outside of work, and a desire to have experience with an agency board or nonprofit organization. They valued opportunities that provided them with support, involved efficient boards, and allowed them to be participatory when they wanted a deeper level of involvement. Quality programming allowed them to connect with others, involved education and socialization, and were seen as successful. What many missed from these programs were a quality mentorship experience, information on how to adequately involve themselves on boards, and a placement on boards that was appropriate for them. In the future, while many see themselves as continuing with lay leadership, some are hesitant to make a commitment currently because they are unsure how involvement will fit in with their future lives. Others hope for involvement that is more hands-on volunteerism. Their

experiences provide learning opportunities that institutions can utilize when considering why and how to engage young leaders.

## **Chapter VI**

### **Conclusion: What Agencies Can Learn**

While it is challenging to engage young professionals in organizational involvement, it is possible. It takes a willingness to be open to change and the ability to truly listen. The following are some tips that agencies can follow when thinking about engaging young professionals in a lay capacity.

**Know who you are:** This generation's young professionals are drawn to organizations that fit with their passions and needs. Belief in the mission, Elie Kaunfer points out, is a necessary factor in successful engagement. He claims that participants in Kehilat Hadar are engaged because their personal interests are in line with the mission of the minyan (Kaunfer, 2006). But connection to the mission is driven by an inner will and interest on the part of the individual; an organization will not be suitable or attractive to every person. If the mission is clear and direct, however, it will be easier to attract interested individuals.

Michael Gecan writes about community organizing and how it can be effective for nonprofit institutions: "We take roles in activities originally designed to address needs that were real fifty years ago, or twenty years ago, but that have long since disappeared or changed" (Gecan, 2002, 134). He charges organizations to look honestly at their mission, look at their customers and constituents, and gauge if the organization still has the ability or necessity to be as effective as it once was. He suggests that if agencies honestly look at themselves and their missions they will disorganize those parts that are not working (Gecan, 2002). Once an organization has really looked at their mission and role in the

community and feels comfortable and connected with that mission, they will be better able to involve others with them and their cause.

**Don't be afraid of change:** In order to engage interested young professionals in an agency, it is imperative that negative thinking is changed into positive actions. If the engagement is approached with a feeling of negativity regarding how young professionals involve themselves in the community, the result will be failure. Give room for different paths and experiences. For instance, organizations can create an active online presence so that interested individuals can find them on their own time.

Organizations can also create volunteering and engagement opportunities that fit with the agency's mission and allow individuals to get involved in a hands-on way. An agency should come up with different ways that individuals can become involved in appropriate aspects of the organization, whether that be as a board member, volunteer, or donor.

**Relationships, relationships, relationships:** The literature and interviews are clear – relationships are the key to engagement. Relationships, Kelman and Schonberg learned, are the key to success. This is especially true with face-to-face interactions (Kelman and Schonberg, 2008). For an engagement effort to succeed, time must be put into creating relationships. In all of the interviews conducted, the fostering, nurturing and sustaining of relationships created the best experiences. Global Circle worked as well as it did in the beginning because the program director reached out to individuals. By getting to know people the professional was able to learn what they were interested in and help them to find the best programs to fit their needs and interests. This is a lesson that can be learned from the tenets of community organizing. Michael Gecan explains:

We don't take the time to 'relate,' to connect publicly and formally but meaningfully with others... We don't take the time to meet one to one with others, to hear their interests and dreams and fears, to understand *why* people do what they do or don't do what they don't do (Gecan, 2002, 21).

Gecan shows that when individual discussions with others are done well, when we take the time to really listen, we will learn more about other people and break down barriers or stereotypes that might exist. This is especially true for nonprofit boards as they try to engage new members. Many of the successful board experiences in the Observership program were the result of boards and staff reaching out to the young professionals. A quality mentorship experience, for instance, helped some Observers to feel more comfortable sitting on their boards. These relationships were successful because someone reached out and listened to the needs of those with whom they were working.

**Involve 20s and 30s to Attract 20s and 30s:** Peter Sheahan suggests that it takes this generation to attract this generation (Sheahan, 2006). If the goal is engagement of young professionals in an organization, then young professionals must be involved in the engagement effort. However, this goes beyond asking a young professional to find people they know. This involves bringing them into the process and empowering them. An example of this is the Global Circle program. Group decisions and planning are almost entirely done by the young professionals leadership, the Global Circle steering committee. They are given leadership roles in the ideas and planning of events. Prior to the programming they help to advertise to people they know, and during the event they are active and integral. Again, principles of community development dictate that we must appeal to what people want and not what we think they need. These young professionals should be allowed the opportunity to express their needs with room left for

their suggestions and criticisms. A quality relationship must involve openness to feedback and an ability to change. Both Global Circle and Observership gave excellent examples of this. The creation of Global Circle is a result of listening to donors. For Observership participants, some of the most valued experiences were the ones in which Observers were able to participate and have their feelings heard.

**Be outcome oriented:** When marketing to young professionals, agencies should know their goals for programming but make sure they are working with the needs of the generation they are targeting in mind. Peter Sheahan reminds readers to “Concern yourself only with the benefits associated with your ‘product’ for the end user, be that status, money, or image. Whatever! Just make sure your main marketing message is built on these outcomes...” (Sheahan, 2006, 109). First understand what the target audience wants, then promote the program to entice involvement.

**Ask:** It is important that organizations are not shy about asking someone to be involved. The worst that the person can say is that he or she is not interested. However, only a minority of individuals of any age will express a desire to be involved on a leadership level. The vast majority will become involved when someone approaches them or recommends involvement to them directly, as was the case with the majority of participants I interviewed. It is important to remember to assign jobs and involvement that will cause the highest level of *flow*. Flow is a theory described by Mihaly Csikszentmihalyi. A state of flow exists when high skill equals high challenge. “The task at hand draws one in with its complexity to such an extent that one becomes completely involved in it” (Csikszentmihalyi, 2003, 40). Giving existing or potential

board members roles on the board that allow their skill to match the challenge will go a long way to keeping them engaged and involved. This was a theme that came through during the interviews with participants. Many expressed feeling highly engaged when they were able to use their professional skills for the agency, as was the case with the Observership participant who presented her marketing skills to the board during their rebranding process. A Global Circle steering committee member enjoyed putting her skills at creating and maintaining interpersonal relationships to use for the group. When participants are able to use their skills it gives them a greater sense of joy and ownership over what they are doing.

**Make room for new board members:** Succession planning is key on boards. Too often the old blood that has been on the board for many years continues to be on the board. While a diverse demography is necessary on the board, by creating time limits and sticking to them, more opportunities are created for organizational change and new, potentially younger board members to enter the board. Promoting new board members to the board when they first become involved can be overwhelming and quickly lead to burnout. Instead, allow for more opportunities for involvement by creating committees or subcommittees where appropriate. This will make room for varied engagement and will lead to a potentially higher pool of engaged leaders for the long term.

**Provide experiences that are hands-on as well as fiduciary:** As many participants expressed wanting to make a direct impact, let them see the agency from all angles. While the board meetings have specific topics that must be addressed, they should be presented with an understanding of outcomes and big picture ideas, as Chait et al. (2005)



suggest. Board members should be allowed to learn in depth the issues facing the agency. Then it should be an imperative to allow board members to be involved in the issues in a hands-on way, through volunteering, a presentation by a member of the organization, or through involvement in the planning process. This will allow the board members to have a tactile understanding of board discussions and give them a better understanding for their role in the agency.

**Provide adequate training and explanation:** Any new board member, including an energized young professional, needs to be trained about the organizational culture, the functionality of the board with regard to its work and place in the overall organization, and the players involved. Do not expect that they are coming into your organization with a full understanding of board process.

**Provide adequate support:** Both the literature and experiences from participants on both programs pointed to the necessity of supporting individuals who become involved on boards. Whether they come on as full board members, in a training program, or in an observing role, success is contingent on providing them with adequate support throughout their initial years with an agency. Agencies have done this in the form of a mentorship program, as was the case with some Observership placements. Some did this through orientations. While both mentoring and orientations are necessary for success, they need to be undertaken with the new board member in mind. Provide support that is ongoing, but based on their needs. To ascertain what an individual needs to feel supported, ask.

**First Impressions Count:** As one of the Global Circle participants noted, events need to be done right the first time. First impressions count with this age demographic; groups

must get it right the first time by thinking of all the details about a program, ensuring a smooth event, maintaining a guilt-free tactic, keeping costs low and affordable, and ensuring that everything done is of the highest quality (Kaunfer, 2006). Programs must be outcome focused, authentic and creative (Sheahan, 2006). Participants on both programs sought out a balance between social and educational programs. When asked which of the Observership events were the most successful, most participants responded that the first program, in which participants were introduced to the board process, and the last program that brought the participants into one room to reflect on their experiences from the year, were the most useful because they had an opportunity to learn new things and network as well. Both Global Circle steering committee members noted that programming has been successful, they felt, because each program is both social and educational. As well as being meaty and offering an opportunity to network, programs and meetings should be well planned out, organized, have clear goals and utilize time to the fullest. Someone in the organization should be steering the ship!

**Timing is key:** Part of understanding the constituents you want to reach is being aware of barriers to participation. It is essential to create programs and opportunities that remove barriers and fit the busy lives of young professionals. If young professionals are to attend, agencies must take into account their availability. For instance, an event during the workday might not gather a critical mass of working individuals. Rather, an agency should work with engaged young professionals and choose a different time that might work better. Not every person will be available at the same time, but the odds of reaching a critical mass are heightened when the constituent is taken into account.

## Summary

Young professionals represent the future of most organizations. Engaging this cohort is often difficult but necessary for the growth and change of an organization. Many young professionals will get involved with organizations or causes that fit their needs and passions. The research is clear; this new generation does have a Jewish identity, but it is expressed in different ways from the way their parents engaged with Judaism. As Wertheimer points out, there are those who engage with older, protective institutions and those who seek progressive or expressive institutions. To hold this generation to a standard that defined their parents' and grandparents' involvement neglects their personal identification. Rather, the organized Jewish community must offer multiple paths of engagement for Jews in their 20s and 30s.

To reach them, it is imperative to understand who they are and what they are looking to do. Agencies must be prepared for their energy and desire for impact. With many organizations this will entail learning how to evolve, becoming more outcomes oriented, and engaging their board members in big picture work for the organization. By doing this they will open themselves up to bringing new board members, especially young professionals, into the structure of the organization. The result will be a board that is diversified and better able to achieve its institutional goals and an agency that is better equipped to remain viable into the future.

## Works Cited

- American Jewish World Service. *Second Amended and Restated By-Laws of American Jewish World Service, Inc.* (Internal Document)
- American Jewish World Service. *Board Member Responsibilities.* (Internal Document)
- Benor, S.B. (2010) Establishment and Non-Establishment Spheres Serve Diverse Jews. *The Jewish Journal*. October 15.  
[http://www.jewishjournal.com/opinion/article/establishment\\_and\\_non-establishment\\_spheres\\_serve\\_diverse\\_jews\\_20101015/](http://www.jewishjournal.com/opinion/article/establishment_and_non-establishment_spheres_serve_diverse_jews_20101015/)
- Birnbaum, M., Kay, S.; Rabkin, R.; Silverman, G.; and Teig, S. (2004) Engaging Lay Leaders: The Role of Training and Education at UJA-Federation of New York. New York: NYU Wagner Graduate School of Public Service Capstone Project.
- Blanchard, T. (2002) How to Think About Being Jewish in the Twenty-First Century: A New Model of Jewish Identity Construction. *The Journal of Jewish Communal Service*, 79 (1/2), 37-45.
- Borowitz, E. (1992) Tzimtzum: A Mystic Model for Contemporary Leadership. In S. Kelman (Ed) *What We Know About Jewish Education*, Ed. Los Angeles: Torah Aura Productions. 331-341
- Bubis, G. (1999) *The Director Had a Heart Attack and the President Resigned: Board-Staff Relations for the 21<sup>st</sup> Century*. Jerusalem: Jerusalem Center for Public Affairs.
- Burkus, D. (2010) Leading the Next Generation: Five Ways to Turn Millenials Into Followers. *LeaderLab Quarterly*, 1/1, 18-21.  
<http://www.doaj.org/doaj?func=searchArticles&q1=David+Burkus&f1=author&b1=and&q2=&f2=all>
- Chait, R.; Ryan W.; Taylor, B. (2005) *Governance as Leadership: Reframing the Work of Nonprofit Boards*. Hoboken: John Wiley & Sons, Inc.
- Cohen, S. and Kelman, A. (2005) *Cultural Events & Jewish Identity: Young Adult Jews in New York*. New York: National Foundation for Jewish Culture.
- Cohen, S. and Kelman, A. (2008) *Uncoupled: How Our Singles are Reshaping Jewish Engagement*. New York: Reboot.
- Csikszentmihalyi, M. (2003) *Good Business: Leadership, Flow, and the Making of Meaning*. New York: Penguin Books, New York.
- Gecan, M. (2002) *Going Public*. Boston: Beacon Press.

- Goldstein, J. (2009) 2010 Global Circle Strategic Plan. New York: American Jewish World Service: February 17, 2009 (Internal Document)
- Goldstein, J. (2009) AJWS Global Circle Steering Committee Responsibilities and Expectations. New York: American Jewish World Service. (Internal Document)
- Goldstein, J. (2009) Young Leadership Update on Progress and Proposed 2009 Goals. New York: American Jewish World Service. (Internal Document)
- Greenberg, A. (2006) "*Grande Soy Vanilla Latte with Cinnamon, No Foam...*" *Jewish Identity and Community in a Time of Unlimited Choices*. New York: Reboot.
- Harris, M. and Rochester, C. (2001) *Governance in the Voluntary Sector*. United Kingdom: Institute for Jewish Policy Research.
- Horowitz, B. (2006) A Gap of Our Own Generation. *Forward*. June 23.
- Israel, S. (2001) American Jewish Public Activity—Identity, Demography, and the Institutional Challenge. *Jerusalem Letter/Viewpoints*. Jerusalem: Jerusalem Center for Public Affairs: No. 462.
- Kaunfer, E. (2005) *Attracting Young People to Jewish Life: Lessons Learned From Kehilat Hadar*. New York: Coalition for the Advancement of Jewish Education.
- Kelner, S. (ms) In Its Own Image: Independent Philanthropy and the Cultivation of Young Jewish Leadership.
- Kelman, A. and Schonberg E. (2008) *Legwork, Framework, Artwork: Engaging the Next Generation of Jews*. Denver: Rose Community Foundation.
- Marker, R. (2003) The Personnel Crisis in Jewish Life: A Contrarian Perspective and New Approaches. *Synagogue 3000*.  
<http://www.bjpa.org/Publications/details.cfm?PublicationID=643>
- Rifkin, I. (1989) Reaching Out to Non-Jews: American Jewish World Service Aims at Helping Third World. Los Angeles: *Los Angeles Times*, Dec. 9, Pg. 12.
- Sheahan, P. (2006) *Generation Y: Thriving and Surviving with Generation Y at Work*. Victoria: Hardie Grant Books.
- UJA-Federation of New York. (2004) Background and History Document, Appendix A. *UJA-Federation of New York Board of Director's Manual*. New York: UJA-Federation of New York. (Internal Document)

UJA-Federation of New York. (2004) By-Laws of United Jewish Appeal-Federation of Jewish Philanthropies of New York, Inc. *UJA-Federation of New York Board of Director's Manual*. New York: UJA-Federation of New York. (Internal Document)

UJA-Federation of New York. (2009) *Observership Informational Brochure*. New York: UJA-Federation of New York.

UJA-Federation of New York. (2004) Standards of Participation. *UJA Federation of New York Board of Directors Manual*. New York: UJA-Federation of New York. (Internal Document)

Ukeles, J., Miller, R., and Beck, P. (2006) *Young Jewish Adults in the United States Today*. New York: American Jewish Committee.

Wertheimer, Jack. (2010) *Generation of Change: How Leaders in Their Twenties and Thirties are Reshaping American Jewish Life*. New York: Avi Chai Foundation.

Windmueller, S. (1999) The Survival and Success of Jewish Institutions. In G. Bubis (Ed.), *The Director Had a Heart Attack and the President Resigned: Board-Staff Relations for the 21<sup>st</sup> Century* (pp. 77-86). Jerusalem: Jerusalem Center for Public Affairs.

Zimmerman, C. (2004) *Agency Board Governance Primer*. New York: UJA-Federation of New York. (Internal Document)

<http://www.ujafedny.org/emerge/>

[http://ajws.org/who\\_we\\_are/](http://ajws.org/who_we_are/)

<http://www.kehilathadar.org/node/6>