

# **REPORT TO THE NATHAN CUMMINGS FOUNDATION**

## **“Cohorts: How They Learn, Lead and Influence”**

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### **EXECUTIVE SUMMARY**

The Jewish Life Program at the Nathan Cummings Foundation (The Cummings Foundation) asked Bronznick & Co., LLC to launch a planning project focused on the concept of cohorts as agents of social change. Our work was intended to identify the best ways to develop cohorts as learning networks, as an alternative model for leadership in the Jewish community, and to explore their potential to influence communal norms.

The thirty programs and organizations that participated in our inquiry collectively represent more than two decades and thousands of participants in the fields of leadership development and social justice initiatives. We scanned this landscape for a diversity of perspectives: from established foundations with significant resources and long-term programs to nascent initiatives now ushering their first cohorts into existence. From “big picture” thinkers providing the aerial view to “on the ground” activist leaders, both within and outside the Jewish world, we invited a wide range of voices into the conversation to help us dissect the DNA of cohorts.

This report summarizes our findings. First, when considering the question of the influence of cohorts in the Jewish community, as well as the larger arena of social change, we found both promising opportunities and clear limitations. There is ample evidence of the practical impact that can be achieved when cohorts convene around “common cause,” to focus on urgent imperatives and discrete, strategic goals, ranging from volunteer service and grassroots organizing initiatives to synagogue transformation efforts and interfaith funding collectives. We were encouraged as well by the meaning and resonance that participants take away from such leadership development and social justice programs and how these programs may promote, in the words of one Jewish social justice organizer, “influence disproportionate to the numbers.”

Among the barriers to influence that emerged from our inquiries was the indication of “reluctant leadership,” particularly among programs targeted to the next generation. While there are abundant examples of creative thinking and innovative projects, we found some ambivalence about assuming the mantle of leadership in the wider sphere. A more troubling observation was the discovery that when newly minted leaders return to their home institutions, they sometimes find environments that are unprepared or unwilling to take advantage of their new skills and leadership capacities. The resulting

exit of these leaders to more hospitable conditions represents a significant loss to those home institutions and community.

Another obstacle to influence might be articulated as the problem of “good intentions.” Although it may appear counter-intuitive at first glance, we found that, in fact, the potential for authentic learning and change may be subverted by convening institutions that lean too heavily on pre-determined outcomes for their cohorts.

Our inquiries focused on the workings of cohorts and the elements that contribute to their vitality and long-term sustainability. We heard a common refrain about the key factors that contribute to successful gathering and learning experiences. These include a diverse mix of didactic and experiential learning experiences; opportunities for peer interaction; the establishment of “safe space;” calibrating the proper roles for convenors and participants; and the critical importance of encouraging “esprit de corps.”

We also examined the paradigms and operating principles of a broad range of leadership programs. Here we identified several common themes. These include a recognition of the continuous circuitry that exists between personal transformation and public activism, the emergence of more collaborative leadership models, and a commitment to developing contexts and tools that build tolerance for real diversity within cohorts and communities.

The result of our inquiries is a set of three recommendations. One of our central conclusions is that any effort to have an impact on widespread communal norms of mainstream Jewish institutions would require a major, multi-faceted initiative that would fall beyond the scope or capacity of the organizations and cohorts funded by the Jewish Life Program. Rather, our recommendations present possible program initiatives that would support, enhance and extend the tangible and vibrant work of these groups, and make them more effective within their own spheres of influence.

The first option would be for the Jewish Life Program to support the efforts of their grantees to develop alumni programs. These initiatives would protect and nurture the investment that has already been made in the individuals and groups convened by these organizations. An alumni support mechanism would help these organizations maintain their networks, provide continuing education and encourage peer-to-peer learning. An alumni component also would benefit the participating organizations by establishing a “giving-back” function, with alumni serving as mentors, teachers, and consultants to new generations of cohorts and to colleagues in the field.

The second program option would be to establish a fund for evaluation and documentation by current grantees in the Jewish Life Program. This fund would be framed as an integral component of institutional development. A rigorous and systemic approach to evaluation would expand the learning and leading potential of grantees and, moreover, would benefit their respective fields of activity, through dissemination of lessons learned. By supporting a disciplined approach to evaluation, documentation and

dissemination of ideas, The Cummings Foundation would enhance the strategic capacity of these groups over the long term.

In addition, as The Cummings Foundation looks to the future, we suggest that one major program initiative to explore would be the creation of several new working groups, each devoted to a specific social justice issue. Each working group would be composed of four to six organizational teams that would convene regularly over a sustained period. The design of such a program would be predicated on a continuous cycle of learning, strategy development, field testing of new ideas, evaluation, revision, implementation, re-evaluation and dissemination of data, results and conclusions. The role of The Cummings Foundation in this project would be to participate as a partner in the learning process and provide the resources to implement pilot projects and to extend the work group's efforts to the larger field.

## **METHODOLOGY**

Our planning project for The Cummings Foundation emerged after a series of discussions with Rachel Cowan, Director of the Jewish Life Program, about leadership and social change within the Jewish community. After several sessions devoted to the nature of individual and institutional leadership, we arrived at the concept of **cohorts** as the focus for our inquiries, both within and outside the Jewish communal arena. We defined cohorts as groups – either formally organized or more loosely affiliated – who meet on an episodic basis to learn, to discuss common interests, and to apply their collective skills and momentum to discrete issues.

We developed a list of thirty interview subjects in collaboration with The Cummings Foundation. Our interview subjects included directors of leadership and social entrepreneur programs, social justice and grassroots organizing projects, and other programs of a more hybrid nature dedicated to policy, institutional and community transformation. (See Appendix A for interview list and brief descriptions of organizations.)

After an introductory letter describing the nature and purposes of the project, each individual participated in a 60-90 minute interview with Shifra Bronznick and/or Didi Goldenhar, with several additional interviews conducted by our colleague, Margo Bloom.

Our inquiries focused primarily on three areas: the degree to which these cohorts are influencing their respective fields, as well as the broader landscape of communal norms; the learning and support mechanisms that bolster the capacity of these groups to lead and exert impact; and whether the cohort model embodies a more participatory and ethical form of leadership development.

During our investigations, we were introduced to the work of the Leadership Learning Community (LLC) which provided us with several excellent reports which summarized their findings about many leadership and alumni programs currently in operation.

## **FINDINGS**

### **OPPORTUNITIES: LEVERAGING THE POTENTIAL OF COHORTS**

Our interviews explored the impact of cohorts, as perceived by the diverse convening institutions and the individuals who have participated in them. What is the influence of these cohorts within their respective fields of activity and activism? How do individuals draw on their cohort experiences to enhance their potential as change agents? What are the obstacles to leveraging the potential of cohorts?

#### **Individuals and the Community: The Opportunity for “Disproportionate Influence”**

We found broad consensus that the cohort model deepens the understanding and practice of personal leadership, and that this benefits the individual’s relationship with his or her own community and sphere of influence. The resonance of this relationship was characterized by one interview subject as “trickle-down impact” and was noted by many directors and participants associated with the programs under review, particularly those focusing on leadership, social entrepreneurship, and community organizing.

“Trickle-down impact” is especially noteworthy among programs that focus on youth and young adults, including the Bronfman Youth Fellows Program, Kolot’s Rosh Hodesh groups for adolescent girls, the American Jewish World Service (AJWS) student volunteer corps, the Genesis summer programs for high school students, the Jewish Organizing Initiative (JOI), and Avodah: The Jewish Service Corps. These programs, among others, target young people at a critical stage in their identity formation and imbue them with a consciousness of social justice, while building their skills as nascent leaders.

For Simon Klarfeld, founder of Genesis, developing an individual social consciousness has tremendous potential for contribution within the community “especially for adolescents, who are in a blur between worlds. We want to create *mensch*s, and to combine being a *mensch* with a consciousness about what you have to contribute as a member of community, whether you’re an official member or not.” Klarfeld sees the Genesis program as leverage for young people to make more reflective, intentional decisions in their lives about the nature of their commitment to community. “You must be involved. Part of that involvement has to be intentional living and conscious decisions about what’s important. Even if you are not officially a leader, never step back from responsibility.”

The Jewish Organizing Initiative approaches this task forthrightly, teaching its fellows to develop community-organizing projects. As described by Michael Brown, the goal of the program is to “internalize a grassroots perspective into their life and work” through life-long careers as community organizers, “not as policy wonks or community agency heads.” Brown reports that 80% of JOI’s alumni have continued to work as community organizers. This commitment to social change underscores what Rabbi David Rosenn emphasizes about the young adults who live and work together in the Avodah program; “When they leave,” says Rosenn, “they take the values, expectations, and experiences with them in a way that encourages them to stay involved in Jewish life and social change.” The goal at Avodah is not about becoming community organizers per se, but to make sure that a social justice commitment becomes part of each individual’s ultimate “portfolio.” By doing so, Rosenn believes that experiences like Avodah will be “influential disproportionate to its numbers.”

The concept of “disproportionate influence” is amplified when the program participant is an adult who already occupies a leadership position. Programs that use the cohort model to bring identified leaders together for learning, reflection and leadership development are designed to nourish and challenge their participants and, in so doing, replenish and strengthen their respective communities. At the Wexner Alumni Institute, for example, Cindy Chazan notes that, over the past fifteen years, alumni of The Wexner Graduate Fellowship have brought their learning and leadership experiences back to their positions as Hillel directors, rabbis, educators, and even as Deans and Vice-Chancellors of rabbinical schools. Rabbi Shoshana Gelfand of the Wexner Heritage Program observes that its learning programs have been instrumental in shifting the alumni priorities in their own communities; for example, by starting day schools or by infusing Jewish content into their local Federations and Jewish Community Centers. Similarly, Rabbi Nancy Flam notes that the Spirituality Institute’s retreat-based program for rabbis, “helps them recover and discover their inner lives so that they can lead from a place of authenticity and wisdom.”

Outside the Jewish community, the concept of creating “disproportionate influence” is a salient feature of the leadership programs developed over the last two decades by the Ford, Kellogg, and Rockefeller Foundations. For example, the Ford International Fellows Program, which provides full graduate fellowships to marginalized populations in 22 developing nations, proceeds from the belief, as articulated by Executive Director Joan Dassin, that “talent is randomly distributed but only selectively developed.” Ford’s response is to challenge and counterbalance the existing “concentration of privilege” in order to access the best talent. “For these very disadvantaged people, we are opening the door; they will do the rest.”

### **Cohort Initiatives in the Field: The Opportunity for Practical Impact**

This report does not presume to offer a comprehensive review on the quantifiable outcomes of leadership and social change programs. However, our interviews with directors and participants of these programs yielded an impressive array of visible results,

from the achievement of specific tactical goals, to the development of key strategic initiatives, to the creation of new forms of engagement in Jewish life.

The success and influence of these cohort initiatives appear to be bound by what Lisa Goldberg of the Revson Foundation calls “common cause.” “You can’t put cohorts together unless you have a common cause.” Marian Krauskopf, of Ford’s Leadership for a Changing World, echoes this sentiment when she declares that “genuine coalition demands real equality where everyone participates and where you get things done.”

One index of impact among social change initiatives is the practical response of cohorts to urgent imperatives. This is exemplified by such programs as the American Jewish World Service, which, through its International Jewish College Corps, annually sends hundreds of Jewish students to Latin America, Africa and Asia to work hand in hand with local community members on sustainable development projects. Likewise, the evolution of the Partnership for Excellence in Jewish Education (PEJE) results from a strategic focus on convening activists, philanthropists and leaders and providing them with tools to support their efforts to develop Jewish schools. Yet another example is provided by the Progressive Jewish Alliance (PJA) in Los Angeles, whose Criminal Justice Working Group, composed of local activist volunteers, established the Jewish Community Justice Project, an innovative Jewish model for mediation and restorative justice. Executive Director Daniel Sokatch says that this project “puts our principles into practice, while creating a new cadre of Jewish social justice advocates.”

Other cohorts leverage their influence by addressing a distinct sectoral need. In an interview with Mark Charendoff, current President of the Jewish Funders Network and previously director of Jewish Educational Services for the Jewish Community Centers Association, we looked at the experience of establishing Jewish educator positions within Jewish Community Centers. As reported by Charendoff, identifying a significant gap in the field was the starting point for building local commitment to the potential role of Jewish educators in the community center setting. The next step was to catalyze the collective potential of Jewish educators as a force for change, by bringing them together to gain practical knowledge and to build the context for their professional aspirations. Equally important was the sustained intervention and “tough negotiations” at the local level, to ensure that local JCC’s gave proper support to their new educators. The result has been increased respect and compensation for professional Jewish educators in JCC’s as well as an exponential increase in their numbers.

Cohorts also have the potential to take root and address issues of change within selected groups of institutions, as evidenced by the influence of Synagogue 2000 (S2K). Co-founder Ron Wolfson notes that S2K, which has worked with nearly 100 synagogues over the past seven years, brings together synagogues to create cohorts, with each synagogue forming internal teams of 20-30 people, including rabbis, cantors, lay leaders and members; these groups “energize” the community to a greater degree than would be possible for any individual. S2K also has been the inspiration and wellspring for other synagogue transformation efforts, such as STAR (Synagogue Transformation and

Renewal) which provides consulting services to synagogues. Moreover, the subject of synagogue transformation now is being integrated into rabbinical school curricula, at the Hebrew Union College in New York and the University of Judaism in California.

Sustainability is an important reference point when considering influence on the community. In the sphere of Jewish organizations and social justice initiatives, the Jewish Funders Network, the Jewish Fund for Justice (JFJ), and the Jewish Social Justice Network all represent cohorts who recognize that, in the aggregate, they have the potential to bring a “multiplier effect” to their common needs and interests. Marlene Provizer of JFJ, describing the Interfaith Funders Network, affirms that these collaborative efforts serve as an internal modality to increase knowledge, as a way to heighten visibility, and as a mechanism to “push the field.”

Evaluation and learning projects outside the Jewish community offer a useful perspective for understanding how cohorts exert impact on a given community or field. The Echoing Green Foundation, which supports young social entrepreneurs starting innovative public service projects, studied the effects of its own program over a seven-year period (1991-1998) and found that 76% of the projects launched by 220 Fellows were still in operation, having transitioned successfully from their founders. For Director Lynn Rothstein, this was a potent finding which reflected the foundation’s emphasis on systemic change that extends beyond the leadership of the founding entrepreneur. Similarly, the Threshold Foundation, a funding circle whose members who contribute financial resources, time and effort to examine issues and prospective funding projects, is predicated on a grants-by-consensus approach. This benefits localized grassroots organizations, macro-level policy change initiatives, and multi-year grants to key organizations in such issues as globalization and gay/lesbian rights.

The Aspen Institute’s Economic Opportunity Learning Program suggests another example of how the cohort model can be deployed to create systemic change. The Aspen Policy Program decided to launch a learning project focused on micro-credit and self-employment policy. Five nonprofit practitioner organizations, two national funders, and a team of evaluators committed to a five-year collaborative learning process. The project’s guiding principle was an exploratory, documentary approach with a focus on strategy, rather than on individual leaders or particular institutions. Over five years, the cohort examined strategic premises, linked these premises to “practices on the ground,” and made mid-course corrections. The benefits to the participant nonprofit organizations included the evidence of strategic goals that had been achieved, an archive of cumulative data, increased visibility, and long-term, mutually beneficial relationships with their cohort partners. The benefit to the funders was an authentic learning partnership with grantee organizations and a tactile understanding of the field that surpassed the kind of knowledge usually available to foundation executives. At the end of the project cycle, the grant makers created a fund to disseminate the Aspen learning pieces to hundreds of other nonprofit organizations. Thus, the Aspen cohort model, with its emphasis on learning, evaluation and documentation, resulted in considerable benefits, not only for its

members, but also for the entire field, including practitioners, funders, policymakers, and other stakeholders who benefited from the lessons learned.

## **CHALLENGES: IDENTIFYING THE OBSTACLES TO INFLUENCE**

### **The Individual Obstacle: “Reluctant Leadership”**

There are significant obstacles to the influence that cohorts and their individual members can exert in their given institutions and communities. Many of these obstacles can be extracted from the reflections offered by directors of convening organizations, as they revise their programs and adjust their participant criteria. There is also a tension around the very notion of outcomes, whether these expectations are articulated by individual participants, funders, or convening organizations.

One obstacle appears to be the phenomenon of “reluctant leadership.” Most leadership and social entrepreneurship programs, both within and outside the Jewish arena, proceed from the assumption that their fellows desire, and are prepared to assume, the mantle of leadership, not only for their given project but in a larger sphere of influence as well. This is not always the case. The Joshua Venture provides a good example of a new program that is revisiting its selection criteria in response to its inaugural cohort of young social entrepreneurs. Brain Gaines notes that the Joshua Venture’s first Fellows were not chosen particularly for their leadership potential but for their original ideas and their “risky work.” For this group, it would have been unfair to label them as leaders or change agents for the mainstream Jewish community. “They don’t want to carry that mantle.” For the next iteration of the program, the Joshua Venture intentionally selected candidates who have a strong commitment to a social change agenda, and an explicit desire to influence the institutions and leadership of the organized Jewish community.

The observations offered by the Joshua Venture are echoed by Heath Row, the self-described “social capitalist” who launched the national Company of Friends (COF). The COF Network convenes the readers of *Fast Company*, a popular New Economy magazine, for regional discussions and networking. Row found that each regional “cell” of entrepreneurs, “free agents” and new technology leaders requires two or three coordinators because, as he wryly notes, people are both “reluctant to lead and reluctant to be led.”

### **The Community Obstacle: Resistance to New Leaders**

We have reported on the positive effects that the individual leader can bring from the cohort model back to his or her institution and community. However, there is also a risk that newly minted leaders may return to home environments that are undeveloped, unprepared, and, in some ways, inhospitable to them. The result is that these new leaders and well-trained social entrepreneurs often leave these institutions and communities,

isolated and disenchanted by the gap between their own potential and the lack of perceived opportunity in their community.

This phenomenon was captured by one of our interviewees in describing the unintended outcome of a sophisticated leadership program created for regional directors of a national agency. The participants rated the program highly and, at the end of the three-year cycle, they even received professional development credit and pay increases. However, shortly thereafter, all the directors who participated in this program left the national agency because what they had learned had expanded their horizons, and their organization could not respond to their new needs and interests.

This crisis of disjuncture also drove the Kellogg Foundation's decision to, after twenty years, close down its National Fellowship Leadership program which had trained 700 fellows. Rick Foster characterized the conditions leading up to this disengagement as the problem of "building the capacity of individuals such that their only avenue of success was to leave their jobs." The consequence was that the Kellogg Foundation was robbing these communities of their best resources. The Foundation's new Leadership Program for Community Change is designed to be consistent with Kellogg's belief that "leadership exists in place." Kellogg has selected five communities, each with 25 Community Leadership Fellows. Each community is vetted for "readiness," which Kellogg construes as the community's capacity to identify nascent leaders, share power structures, and work on issues of common concern.

### **Outcome as Obstacle: Community Influence Undermined by Good Intentions**

A third perceived obstacle to influence is the reliance on pre-determined outcomes by convening organizations, leadership programs, and foundations. Rabbi Irwin Kula, President of CLAL – The National Jewish Center for Learning and Leadership, believes that this tendency subverts the potential for authentic change. "We need to detach from outcomes. In a moment of transition, all you know is that there needs to be a change from the past. But don't determine outcomes for the future, or it stops being a moment of transition." Kula indicates that one problem of structuring groups is the assumption that they have to stay together. He points to CLAL's creation of the Jewish Public Forum (JPF) as an example of a group that defied that assumption. The JPF reached out to cultural and intellectual leadership in America and brought them together for discussion, "with Judaism as the wisdom tradition." The "outcome" for this cohort was the experience itself. While the group no longer meets, they have stayed together loosely through e-mail. Kula's axiom, both for individuals and convening institutions is, "Don't try to control the creativity."

The influence of cohorts also can be undermined by ostensibly good intentions. A telling example was reported by one interviewee. Having observed that her colleagues in the communal arena had little access to professional development, she leveraged the power of e-mail – "viral marketing" – and brought together a group of her peers. The objective was to provide a "gateway" for these professionals who began meeting monthly for

networking, speakers and panel discussions. After about a year, the group “came under the spotlight” of the organized Jewish community, and the participants found themselves beholden to the institutional sponsors who had contributed modest funds to the effort. “It became too political,” notes the organizer. “Whenever a group of young professionals gets together, the organized community latches onto them, ‘to save the Jewish people.’” She stresses the need for institutions to maintain a delicate balance, between providing the right resources but not predetermining the outcomes or trying to influence the “DNA” of the group.

## **HOW COHORTS FUNCTION: WHAT WORKS**

We examined how cohort models work within social entrepreneur programs, public policy and institutional change programs, leadership development projects, and grassroots organizing entities, as well as looser confederations of individuals who gather periodically for networking and intellectual stimuli.

We asked about the functional components of these cohorts and how these working parts under gird the cohorts’ internal support system, enhance their learning potential and provide momentum for activist initiatives. Do cohorts indicate preferences for convening venues and formats? What learning preferences have emerged, respective to curricula, learning styles, and skill building?

## **CONVENINGS:**

Cohort groups may meet monthly or annually -- for daylong conferences, weekend site visits or five-day retreats, with the size of the group ranging from eight to 800. Such gatherings act as a magnet for networking, a venue for learning, and a platform for drafting strategy and creating synergies among like-minded people who want to make a difference. The groups that we studied included those that shared the same agenda and vision, as well as those that came from different backgrounds and offered diverse perspectives. We found tremendous enthusiasm and support for the activity of coming together -- to connect, communicate and collaborate, through networking, study, reflection, skill-building, personal development, song, prayer, team work, and action planning. There was agreement among many of our interviewees that the most powerful magnet for any cohort was “real work that needs doing.”

Convenings vary according to the composition, needs, current imperatives, and long-term goals of the cohort and convening organization. Each convening creates its own ecology, ranging from Achiot, a group of 25 Jewish feminists who have gathered for an annual “Renaissance” weekend for the past fifteen years, to the 43,000 members in Company of Friends, the community of Fast Company readers who gather in regional city “cells” to discuss work, leadership, business and life issues.

We found broad consensus that the personal impact of attending such conferences and meetings is profound and significant. As Simon Klarfeld observes, “There is a magic to residential, experiential moments, taking people away from their usual routine and allowing them to think anew.” Rabbi Shoshana Gelfand reports that Wexner Heritage participants create “a shared language and experience” at their retreats, beginning with their “personal odyssey to leadership,” which aligns their personal, Jewish, and institutional story. At Joshua Venture, the initial cohort of eight young social entrepreneurs began by noticing their differences. “I’m a filmmaker. What do I have in common with a rabbi?” By sharing their actual experiences of struggling to launch their enterprises they came to feel a “heartfelt camaraderie” that transcended the diversity of their backgrounds.

Ruth Messinger, Executive Director of AJWS, affirms that activists need to talk with their peers about the challenges of running a small organization and to share innovation in the Jewish community, as well as to share the common challenges enmeshed in the lives they have chosen. “What does it take to have a lifetime of social justice?” Mark Charendoff says that bringing people together reminds everyone that “these are great vineyards for toiling in” and that convenings help people transcend the “existential loneliness” of being a Jewish foundation professional or educator or activist.

In looking at convenings, we found that the success of such gatherings hinges upon four elements: 1) Making convenings relatively accessible; 2) the creation of “safe space”; 3) striking the right balance between convenor and participants, and 4) bringing “fun” to the experience.

### **Access: Local/Regional vs. National**

In terms of access, we found that a local or regional focus supports the convening function, especially over the longer term. National gatherings do have some advantages. Deborah Meehan, of the Leadership Learning Community, applauds the value of national gatherings, for the diversity and added texture that such gatherings contribute to the common knowledge base. However, she cautions, national gatherings require time, distance and money, all of which are experienced as obstacles by the leaders and activists that we interviewed.

Overall, we found a distinct preference for local convenings. Although the Jewish Social Justice Network has convened nationally, Cindy Greenberg notes that there are serious questions about what it means to be allied as a national organization since “these are locally-based organizations that deal with local concerns.” Similarly, Michael Brown, of the Jewish Organizing Initiative, notes that the “real heart of the work is local and what people may benefit from is time spent together with local colleagues.” However, he adds, when JOI Fellows from Boston spent a few days with Avodah Fellows in New York, that was deemed “very useful.” Likewise, Sharna Goldseker of Bronfman Philanthropies says that local efforts tend to be more “personally driven” and that this is often critical to the dynamic that launches start-up efforts.

There is, however, also a substantial appetite for regional conferences and learning circles. Synagogue 2000 uses its regional model to increase access for synagogue teams; the regional grid makes it possible for participating synagogues to interact easily with each other. Deborah Meehan suggests that the regional model offers greater potential for working across disciplines to achieve systemic goals. By way of example, she reported on her own experience with forty Kellogg Fellow alumni in the Bay Area. The group came together to mount a response to California's Proposition 187, working closely with the local school and community health boards to achieve cross-sector impact. As an *ad hoc* group that met regularly for six months, this cohort became educated about school and welfare reform and came to know each other around a shared community change agenda. For this regional group, convening across disciplines served as the modality for change, without the pressure of building an organization which, Meehan notes, "requires a lot of resources."

### **Safe Space: Creating Fertile Conditions**

The creation of "safe space" was cited frequently as a necessary prerequisite for the exchange of ideas, for dialogue about difficult issues, and for creating a platform for learning. The Genesis program, as described by Simon Klarfeld, is designed to help young people learn "how to listen, how to persuade, and how not to distance oneself." The four-week experience is "a constant cycling between risk and safe space, with the program as the facilitative fabric." Synagogue 2000 has created a curriculum that begins with prayer, study and discussion of personal life issues by the synagogue cohort. The groups are encouraged to use the first year in their two-year program strictly for study, reflection, and for looking thoughtfully at themselves and their synagogue, rather than taking action too quickly. At the annual Wexner Graduate Fellowship Alumni Institute, Cindy Chazan confirms that the creation of safe space allows the Fellows to "talk about shortcomings and fears, both personal and professional."

The Ford International Fellows Program strives to create conditions for their retreats that support the broad array of languages, leadership styles, disciplines and political systems that their Fellows bring with them. This groundwork emphasizes "working hard to communicate across cultures and other divides." The Kellogg Foundation, the Rockefeller Next Generation Leadership Program, and the Aspen Institute all stress the primacy of creating a "safe place" for launching conversations that may touch on issues of division as well as connection. The Rockefeller program has actually engaged the Harvard Negotiation Project's spin-off consulting firm, Vantage Consultants, to train their Fellows in the competencies needed to conduct, "difficult conversations." These organizations have all worked carefully to develop participatory convening models that combine personal and professional interactions, in order to facilitate the building of trusting relationships and a cohesive group dynamic.

## **The Convenor's Role: A Delicate Balance**

The behavior of the convening institution has enormous influence during its gatherings. The convenor must create the fertile conditions and provide the necessary tools and resources while giving the group enough latitude to sow its own seeds and determine its own growth process. The freedom of the group to determine possible directions during convenings is analogous to the balance that needs to be maintained between overall cohort development and the tendency of the organizing entity to project outcomes, as described earlier.

Deborah Meehan of the Leadership Learning Community confirms that the greatest need at convenings is to get groups actively engaged “rather than just downloading information.” Meehan believes that Open Source Technology offers enormous potential for letting the activity be driven by the community, “to see where the greatest level of energy is, to support its self-organizing capacity, and to unleash the spectrum of thinking.” Indeed, when one organization convened a group of creative and accomplished young Jews, there was resistance to the presence of a strong facilitator and to the perception that the organizers might push their own agenda. When Rachel Levin of the Righteous Persons Foundation and the Bronfman Philanthropies’ Roger Bennett launched Reboot and convened a cohort of creative young talented Jews, they used Open Source Technology to create a context for conversation that would be driven by the participants’ own curiosities and passions. Similarly, the Wexner Fellow Alumni play a major role in planning the program for their Institute and in leading the sessions. Even the high school students in the Genesis program are gradually given more planning responsibilities over the four-week duration, until they take the helm to design the final Shabbat of the program.

For social action groups like Avodah, the Jewish Organizing Initiative and the Progressive Jewish Alliance, the role of the convenor is to empower the people to do the work, by providing expertise and resources as needed. The challenge, as articulated by Marlene Provizer, is “How does an effective community organizing leader utilize expertise and at the same time nurture the leadership of their members?” Michael Brown of JOI says, “Never do anything for people that they can do for themselves,” while Daniel Sokatch remarks that “fifty percent of community organizing is getting the dates arranged, getting the coffee and getting the room.” Likewise, Cindy Greenberg of the Jewish Social Action Network sees herself as a repository of knowledge, by matching groups that can exchange skills.

In the New Economy business community, Heath Row created Company of Friends after studying what brought people together in a collective way, including salons, anarchist cells, evangelical Christians and Quaker communities. Row found that, in his own experience, “too many structures stilt a group.” Fast Company provides tools and resources, and spends time cross-pollinating networks, in order to encourage people to “stretch themselves and stretch each other.” At the MacArthur Foundation, Daniel Socolow resists bringing alumni Fellows together for any predetermined purpose, but

occasionally convenes selected groups by fellowship year, “to provide an environment for the unexpected. The paradox is that if we design the program or put a structure on it, the unexpected is less likely to happen.”

What happens when the delicate balance between convenor and group is skewed? Deborah Meehan notes that one indicator of success for leadership programs studied by the Leadership Learning Community is a “mutiny,” in which participants take initiative in redesigning their seminars. This was, in fact, what happened in the first cohort year of the Rockefeller Next Generation Leadership (NGL) program. Surita Sandosham, a Fellow in that first cohort and now the NGL Program Manager, recalls that her cohort rebelled against the Foundation’s “well-intentioned” structure; their “mutiny” uncovered the need to solicit the participants’ feedback, in order to evaluate and strengthen the program and build an effective problem-solving network.

The role of the convenor and the discipline required to maintain the proper distance may be particularly difficult when issues arise that threaten to disrupt “safe space.” Even in these situations, convenors must resist the temptation to manage the experience. Rick Foster describes Kellogg retreats where there was evidence from the outset of risky issues and troubling conflicts that might polarize the group; for example, around issues of race and class. Instead of raising the issues, the Foundation decided it would be more meaningful to build trusting relationships and then wait for the cohort members to raise these issues themselves.

### **Making it Fun: The Importance of “Esprit de Corps”**

Finally, what about fun? Rabbi Irwin Kula stresses the importance of being inventive and creative at these gatherings. “There’s no place in American Jewish life for that kind of new thinking, to be playful and thoughtful, to be improvisational.” Daniel Sokatch emphasizes that fun is a “huge” element in community organizing. “The PJA ethos is “cool, hip, a mix of earnestness and fun.”

Regardless of organizational affiliation, urgent imperative, or long-term goal, people need to have a good time – breaking bread, sharing family time, creating skits, singing, or simply gathering in the hallways for impromptu conversation. Indeed, for social justice activists, there’s a special value in the esprit de corps gained at these gatherings since, as Ruth Messinger suggests, “There’s a level of group health needed to alleviate the intensity of the work we’re doing.”

## **LEARNING**

We asked about the kinds of learning that cohorts want. What are the most successful learning formats? What skills do cohorts need? From whom do cohort members learn best?

Two primary axioms for successful cohort learning surfaced from our investigations. The first is that cohorts need to be given permission and encouragement to engage in different kinds of learning – text study, written curricula, case studies, resource people, mentors, coaches, scholars and experts. Second, they need to hold each other responsible for learning and to take mutual responsibility for getting there. This second axiom indicates the high level of peer learning that informs the education process of these groups.

### **Learning Formats: The Didactic-Experiential Mix**

Our interview respondents confirm that participants do well with a variety of learning formats. Cindy Chazan emphasizes that drawing upon both didactic and experiential models has been central to the success of the alumni programs of The Wexner Graduate Fellowship. Similarly, the Genesis program names its learning components as “heart, head and hand,” combining cognitive and intellectual issues, affective issues and experiential, hands-on experiences. The day school professionals and lay leaders in PEJE learn through text study, approaches to resource allocation and through each other’s school presentations.

While some people want to learn from “stars,” our general observation is that bringing in the “best and the brightest” as teachers can be a risky venture. In launching the Joshua Venture, Brian Gaines experimented with ways of training the first cohort -- “incredibly bright young people” -- in the best skills and practices of both the nonprofit and private sectors. What he found was that his initial design, a “mini-MBA” program, did not work. The Fellows chafed under the didactic approach and felt that the experts who were “parachuted in,” disrupted the essential intimacy of the program. They responded much more favorably to learning from the success and failures of other young social entrepreneurs that Gaines integrated into their retreats.

For groups focused on institutional change and social justice activism, the experience of learning must include pragmatic skill-building and resource management. First-year Echoing Green Fellows are trained in program logic and models, organizational capacity building, board development and fundraising. Avodah Fellows learn about conflict management, group dynamics and about “managing up” as an essential component of nonprofit management. The placement of Avodah Fellows in New York City community agencies gives them the opportunity to put their skills immediately into practice and to bring “real-time” work challenges back into the learning sessions. Rabbi David Rosenn says that, “the goal is to give them the tools to make change even when one does not have the position or authority.”

### **Peers: A Central Source of Wisdom**

The role of peers in the learning process is particularly important among these groups. Brian Gaines at the Joshua Venture found that, when the learning process was turned over to the Fellows, they emerged with the “Hot Tamale,” a format similar to venture

capital “auditions,” in which members presented their projects to each other, with a rapid feedback mechanism. For the Jewish Organizing Initiative, the group itself is utilized as a laboratory for learning about group dynamics and community organizing; part of the Fellows’ emerging leadership is to learn from their colleagues’ interventions in the group.

Peer-to-peer learning can be very powerful, but there are limitations to the degree and depth of these experiences, particularly among people whose age, work history, professional expertise or area of scholarship is narrowly defined. Rabbi Irwin Kula observes that, for example, younger people may have the passion but nothing to draw upon except their own life experience. To correct for these limitations, some programs, e.g., Wexner and Kellogg, make use of their alumni as mentors and coaches. Cindy Chazan notes of the alumni of the Wexner Graduate Fellowship in this regard that “some want a buddy system; some need a more ‘critical’ colleague.” Roger Bennett suggests that mentoring works best when it moves in both directions, as a bi-generational conversation. While mentoring is seen as critical to many cohorts, PEJE found that to help its day school principals, coaches – or *madrachim* – were essential.

## **LEARNING TO LEAD**

We explored the question of leadership development and the contexts in which individual and group leadership thrive. We asked people what they emphasize in developing leaders, as individuals and in groups. How do cohorts describe their leadership models? Do behavior patterns of cohorts suggest a more collaborative, and perhaps more ethical, breed of leadership?

With respect to leadership, we found four common refrains: the inextricable link between personal and public experience; the trend toward adaptive, facilitative leadership models; the importance of building teams; and an explicit commitment to diversity.

### **The Personal and the Public: An Inextricable Link**

We found that, in leadership programs and social change initiatives, there is a deliberate circuitry traced between inner life and outer activity. This circuitry animates the leadership experience and is perceived as a profound leverage for subsequent influence in the community.

The design of Synagogue 2000 proceeds from the belief that personal transformation precedes institutional transformation. This recognition empowers the entire synagogue cohort and creates more equal relationships between staff, clergy, board, and others. Meetings of synagogue cohorts reflect this principle; members start with prayer and text study and discuss what’s going on in their personal lives before attending to the task of looking at their own synagogue. Similarly, the Spirituality Institute proceeds from the belief that leading with integrity emerges from reconnecting to one’s inner life and spiritual practice. The Spirituality Institute builds its curriculum in stages: first, inviting its participants to look at their inner lives, how their personal issues are reflected in their

study and how their study is illuminated by their personal lives. It is not until the latter part of the curriculum that the rabbis begin to consider how the spiritual practice they are developing can be made manifest in their workplaces.

This is echoed by Rabbi David Rosenn's Avodah program, in which Fellows live together and share responsibility for the form and content of their retreats and learning programs. Rosenn says that "strong communities and strong relationships are critical to social change. You can't sustain long-term social change without a commitment to your spiritual life and your spiritual life needs to be linked to your external work."

For many Jewish communal leaders, especially spiritual leaders, finding a safe space in which to discover their inner lives is rare in a Jewish world which emphasizes building to serve others. But as Rabbi Irwin Kula noted, "If we would start building a Jewish life we ourselves would want, something that would really satisfy ourselves – rather than always trying to imagine what others want – that would be a powerful change."

The recognition of the link between the personal and the public drives the learning model of many leadership programs. Jennifer Cobb of the Rockwood Fund notes that their program for social activists has "cherry-picked" the best of meditation and spiritual practice programs, in addition to theories and practices drawn from corporate and nonprofit leadership training. Rockwood believes in working "from inside to outside, from external back to internal." The social activists who come to Rockwood bring a 360-degree assessment tool that has already been completed by their colleagues, bosses, partners and themselves. They then explore the gap between the way they perceive themselves and the way they are perceived by others, and how this gap might be preventing them from fulfilling their vision. Rockwood's program is designed to help social change activists narrow this gap by plotting the learning agenda they need to create to expand their internal capacity and to strengthen their external impact.

At the Leadership Learning Community, Deborah Meehan finds that "within leadership development programs, many people find that issues of spirituality emerge in unanticipated ways during the course of intensive learning." Meehan, who has convened meetings devoted to the connection between social activism and spirituality, observes that experienced community leaders believe that some form of personal transformation or deepening of commitment to a larger good is at the core of effective grassroots leadership. While most programs have not consciously integrated "spirituality" within the formal design of their programs, their participants have addressed that need by designing retreat agendas that incorporate individual learning plans, fellow-initiated study seminars and rituals and ceremonies.

### **Collaborative Leadership: "Stepping Up and Stepping Back"**

We found a strong trend toward more adaptive, facilitative forms of leadership, both in leadership development programs and in organizations dedicated to social justice. Leaders increasingly understand that the challenge is not to "empower" other people but,

in the words of the Ford Foundation's Marian Krauskopf, "to help people recognize their own strengths." At many of these organizations, the selection process, working group structures, and convening formats are explicitly designed to enhance their collaborative, facilitative potential.

One Jewish leadership program has discovered that the group's "powerhouse profile" needs to be supplemented with a good "facilitative" person as well as "nascent or nontraditional faces of leadership." Similarly, Surita Sandosham looks for Rockefeller Next Generation Leaders who bring group process skills and different sets of expertise. "We want to create a leader-full community." The Echoing Green Foundation selects Fellows who bring a vision of social change and community-building skills rather than expecting their personal leadership to dominate the process. This is consistent with the Foundation's commitment to systemic change and their special focus on succession issues with their social entrepreneurs, to ensure that they do not get caught in the "founder syndrome." The emphasis at Echoing Green is on passing the projects to the next iteration or generation of leaders. "The Fellows learn that they don't always have to be the leader. They know that it's important to hand the project over to the community."

Rick Foster describes the Kellogg Foundation's shift in perspective about leadership as moving from the "power of one" to "less about John Wayne and more about facilitating others' ability to lead." Foster emphasizes that the individual leader can no longer go alone on complex issues. "Globalization and computers explode boundaries; thus, leadership development has to be approached as permeable membrane, looking at all relationships in broader geographic sense. In this context, leadership is designed to build relationships of similar interests and create space for others to lead."

One caveat must be added, however, to the discussion of collaborative leadership, in explaining the validation of the assumption that these more facilitative leadership models result in more ethical outcomes. Rabbi Irwin Kula says that such a hypothesis is both true and false. He has seen many pluralistic groups that operate in authoritarian manner. "There are communities which, for all their ideological purity and social purposes, are clearly built on charisma and an authoritarian model. There's debate and complexity, but no individual vote." He also has seen "good people espousing ethical leadership who can't get anything done, and authoritarian, hierarchical people who have been able to do great good."

Similarly, Marian Krauskopf of the Ford Foundation warns against an overly passionate embrace of collaborative community-based leadership. "Lots of structures in our society are run more traditionally and hierarchically, and there is a lot of power and prestige and possible leverage in those structures." That being said, the Ford Foundation has found that new kinds of grassroots leaders understand that they function most effectively by "stepping up and stepping back" as a way of leading. The emphasis on collaborative leadership has extended to Ford's research component. The Fellows participate in a partnership with a cooperative inquiry research team, posing their own specific leadership questions and then seeking to learn more about alternative ways of handling individual

challenges in their communities. In this kind of effort, the process is itself an outcome because the goal is to create a knowledge hub that others can access about collaborative leadership.

### **Sustainability: The Building of Teams**

The building of teams appears critical to both leadership programs and social change initiatives, primarily so that individual leadership development does not drain talent or energy from the surrounding community. This issue speaks directly to the sustainability and influence of cohorts; indeed, the Leadership Learning Community has found that the development of Fellowship “teams” within the community can correct for the absence or withdrawal of any individual leader.

At the Progressive Jewish Alliance, for example, each working group brings together local volunteers who are charged with developing projects, organizing conferences, staffing events, drafting position papers and even preparing amicus briefs for the court. While each group includes at least one staff and board member, the volunteers drive the process.

Michael Brown seeks to inculcate JOI Fellows with the basic principles of community organizing; these include the importance of teams and the necessity of building initiatives that are based on the knowledge and expertise “of the people who will be most affected by the issues.” In the Jewish Social Justice Network, Cindy Greenberg describes the group’s leadership as “less hierarchical,” and more oriented toward a team approach, with fewer distinctions between board, staff, and volunteers in decision-making.

### **Embracing Diversity**

The importance of building diversity into leadership and social justice initiatives cannot be overemphasized. The commitment to common cause, combined with the work that needs to be done, serves as a magnet for leaders and social activists regardless of personal or cohort identity. When Marian Krauskopf of the Ford Foundation asserts that “leadership abounds,” it is with the acute understanding that the public discourse around leadership must be lifted from the province of a homogeneous elite and expanded broadly.

An explicit commitment to diversity is evident in Avodah, American Jewish World Service, the Bronfman Youth Fellowship Program, and the Spirituality Institute, among many others. Whether diversity is constructed across generation, denomination, geography, class, sector, gender or sexual preference, it is widely acknowledged as a contributing factor to long-term vitality, impact, and sustainability. (While race is an issue that has not been particularly applicable to Jewish efforts, it is a critical index of diversity in all general leadership programs.) As Simon Klarfeld emphasizes, “It is important to create a diverse group with different opinions. From that struggle comes creativity.”

Building cross-denominational networks is of particular concern to the Wexner Foundation, which devotes considerable attention and care to its alumni's varying denominational concerns and needs. The result of this modeling has been a new sensitivity towards these issues among the alumni. The expectation is that, as these alumni assume leadership positions in Jewish institutions, they will embody this spirit of genuine respect for Jews of different perspectives and denominations.

For the college students participating in AJWS volunteer trips, the encounter with the diversity of the group is as potent as the intense experience of volunteering in a foreign country. Ruth Messinger reports that, for some participants, this may actually be their first experience of being in a program together with people from Orthodox backgrounds.

In the Progressive Jewish Alliance, the diversity of the volunteer work groups is a highly-prized value. The PJA Criminal Justice Group, for example, was comprised of twelve people, including a chairman of Talmudic studies, a renowned constitutional scholar, a UCLA law professor, a screenwriter, an older activist, a Reform rabbi, and a mystery bookstore owner.

Outside the Jewish communal arena, the major foundations have long recognized that, because the United States is so diverse, leadership programs have to build their leaders "across differences." Rick Foster notes that the first cohort of Kellogg's National Leadership Fellows were exclusively white and male; by the sixteenth year, the Fellows were largely female, people of color and community-based. Similarly, Surita Sandosham notes that the Rockefeller Next Generation Leadership program raised the age limit to fifty, specifically to accommodate more women who were prepared to explore their leadership potential at a later stage in the life cycle.

When Rabbi Irwin Kula considered the issue of cohorts, diversity and the creation of a more collaborative model of leadership, he suggested that "the ideal model would be democratic, collaborative groups who maintain balance between interior and exterior work.... How big can you build the tent? How diverse are you – are you willing to be?"

## **RECOMMENDATIONS**

We were asked to launch a comprehensive inquiry into the ways that cohorts in the Jewish community learn, lead and influence communal norms. While we were not charged with the responsibility to design new initiatives for the Jewish Life Program, it seems useful to respond to a larger question embedded in this inquiry; that is, how the Foundation might leverage the significant investments it has made in supporting initiatives that promote social and economic justice, ethics and Jewish spiritual practice, Jewish leadership and organizational culture that reflect these values, and new partnerships between Jews and people of other faiths around common goals.

The most difficult question that we confronted during this process revolves around the issues of potential and scope. How likely is it that the groundbreaking work of progressive cohorts supported by The Cummings Foundation can influence the norms of the organized Jewish community? Founders of Jewish social justice programs, like Rabbi David Rosenn of Avodah, believe that “our influence will be disproportionate to our numbers.” Ruth Messinger of AJWS is forging ahead with great determination to ensure that every engaged Jewish person makes a term of community service an essential ingredient of his or her life history. The Jewish Fund for Justice has formed a working partnership with the Boston Combined Jewish Philanthropy (widely recognized as the most innovative Federation in the county) to support low-wage worker projects. However, despite their passion and commitment, echoed by many other like-minded colleagues, we see that the organized Jewish community’s commitment to social and economic justice is too often muffled by the competing allegiances of the Jewish affluent, combined with an ongoing shift to the political right.

To many astute observers of the Jewish world, it is clear that the innovative work of The Cummings Foundation grantees in the arena of spirituality, synagogue transformation, Jewish healing, and Jewish social entrepreneurship has illuminated important new avenues of creativity, goodness and vitality. In particular, a number of synagogues have benefited from participation in change initiatives, including the growth of independent prayer groups – *minyanim* and *chavurot* – that have sprung up as vital cohorts within long-established synagogues. The influence of a new kind of leadership also infuses several outstanding institutions; notably, the Jewish Community Center in Manhattan, whose Executive Director has achieved extraordinary results while leading from a platform of ethical values, collaborative leadership and a commitment to diversity in denomination, family structure, and sexual preference.

Nonetheless, for the most part, the center of the Jewish community, as represented by its vast network of local and national institutions, has not integrated new values or practices into its systems. Whether it’s the intransigence of the hierarchical leadership or regression to an earlier agenda, as a result of the collapse of the peace process and the rise in anti-Semitic incidents, there is little evidence that our mainstream organizations are developing new forms of facilitative, collaborative leadership.

Our conclusion, therefore, is that any effort to influence Jewish communal norms of mainstream institutions would require a major, multi-faceted initiative that is currently beyond the institutional scope and capacity of The Cummings Foundation-funded cohorts. Such an endeavor would require, as a starting point, a needs and readiness assessment of key stakeholders in the organized Jewish community and an evaluation of “fit” between these assessments and the abilities and aspirations of the current Cummings Foundation grantees and their colleagues in the field. We touched on these issues in our interviews, but we did not undertake the kind of inquiry that would allow us to develop a plan for influencing Jewish communal norms. Nevertheless, we flag this unexamined area of inquiry should you wish to explore these questions at some point.

What we have found, in fact, is that there is little appetite among most of these cohorts for reforming or transforming the organized Jewish world. As Brian Gaines of Joshua Venture said, “Our first cohort of fellows resisted the mantle of leadership in changing the Jewish community.” Rather, these social entrepreneurs wanted to focus on creating independent initiatives. In the second cohort, the Joshua Venture looked specifically for prospective Fellows who demonstrated interest in social change and in influencing the larger Jewish community. It would be worth assessing whether the Fellows in the second cohort expand Joshua Venture’s influence in the Jewish world, and whether they spark new interest in this kind of work among their colleagues.

It also is important to recognize that the appetite might be lacking in both directions. Leaders from mainstream institutions may often be less than receptive to participating in these new innovative programs. When the Spirituality Institute selected 60 rabbis in two cohorts for fellowships in the Spirituality Institute, despite the many rabbis who serve in mainstream organizations such as Jewish Community Centers and Federations, only one rabbi applied from a communal institution other than a congregation, a chaplaincy or a Hillel.

The question of how to build sturdy bridges between the most mainstream of the organizations of the Jewish world and these new entities has yet to be answered. It is worth noticing that, even among the impressive, committed Jewish alumni of the Wexner Fellowship, few work in Federations. If The Cummings Foundation concludes that it is actively interested in influencing Jewish communal norms in institutions such as Federations, a comprehensive effort involving a range of intelligent and appropriate partners would be required to develop such a strategic plan.

On the other hand, a number of the cohorts who have been examined in this report – including many Cummings Foundation grantees – are creating tangible and vibrant alternative contributions to Jewish life, and new opportunities for Jewish engagement. If the goal of The Cummings Foundation is to design the best way to increase the return on the investments that has been made to date – training Jewish community organizers; integrating community service as a part of every engaged Jew’s primary identity; supporting Jewish advocates; amplifying a Jewish progressive voice; reinforcing the creative efforts of Jewish social entrepreneurs; extending new spiritual practices to Jewish professional and lay leaders; launching synagogue transformation initiatives; and framing new approaches to Jewish healing – then there are several ideas to consider, as outlined below.

### **Program Option One**

#### **Support for Alumni Programs: Leveraging The Return on Investment**

The Wexner Fellowship program invests substantial resources in providing graduate fellowships and leadership development programs for its program participants. In return, alumni commit themselves to working within the Jewish community of North America

for at least one year for each year of funding. As a result of an external assessment, Wexner launched an ambitious and effective alumni and community development program. As directed by Cindy Chazan, a significant and visible leader in the Jewish communal world, alumni receive guidance on their careers, community development challenges, and personal development. She and her Wexner colleagues also provide alumni with access to a wide range of contacts and mentors. The centerpiece of the Wexner alumni program is an annual institute, largely designed by the alumni themselves, where an ambitious program of peer-to-peer learning is partnered by the judicious use of outside expertise and scholarship.

For many alumni, this network provides sustenance and support through friendship and collegial bonds across organizations, fields and denominations. Rabbi David Rosenn of Avodah, who is a Wexner Fellow Alumnus, considers this network a powerful ally to his work because “we take advantage of each other’s leadership and skills” and because his fellow alumni make him feel “inspired, not pushed.” According to Cindy Chazan, “Each layer of the experience of the Wexner Fellowship is built on the philosophy of safe space. It is rare in Jewish life to have that. We want to continue that feeling of safe space for alumni.”

Bronfman Youth Fellows commit to one year of volunteer service in social action programs subsequent to their fellowship participation; they also attend follow-up seminars and gatherings with their group and their Israeli colleagues. Bronfman alumni also stay connected through a list-serve for mentoring, job searches, graduate school and discussion of Jewish issues. Their interest in being part of a network is evidenced by the 95% return rate on a recent alumni survey. AJWS students who participate in the seven-week summer volunteer program abroad convene for three retreat weekends in the following year, where they build upon their international experience by developing additional skills in public speaking and campus organizing; the participation rate is 90%. Both Avodah and the Jewish Organizing Initiative have recently held alumni meetings that were launched in response to alumni requests, with alumni taking the initiative for the planning. The Spirituality Institute has held a retreat for its first rabbinical cohort as well, with two-thirds of the alumni participating. Synagogue 2000 is also exploring the opportunities for convening its alumni synagogue cohorts.

At the Kellogg Foundation, alumni gatherings are self-generated by Fellowship cohorts. While Kellogg allocates funds to its leadership center to convene alumni networking meetings around specific interests, the Foundation strongly believes in the “power of integration and disintegration; that is, to “bring people together around significant issues and then disbanding.”

Convening alumni presents both opportunities and challenges. On the one hand, as the Wexner Foundation discovered, an alumni component can be a powerful way to nurture the original investment in individuals and networks. On the other hand, Deborah Meehan’s extensive report, “Learning about Alumni Development,” notes that “time, distance and money” represent compelling barriers to the creation and sustainability of

such networks. The fact is, while alumni need to play a central role in launching these networks and designing the gatherings, most of the alumni of leadership programs are already grappling with severe time constraints. Without effective staffing and provision of resources by the convening institutions, these alumni initiatives will not sustain themselves.

There must be an authentic reason to bring people together since reunions alone will not be sufficient to attract alumni over the long term. According to Deborah Meehan's scan, alumni show the greatest interest in programs that will provide personal support, rejuvenation, continuing education and leadership development, collaboration within selected fields, opportunities to broaden perspectives, and venues for building and sharing skills. Alumni also want to give back to their sponsoring programs, as volunteers, mentors and consultants. Among the outcomes of these alumni gatherings have been collaborative teaching projects and a regional leadership institute that provides technical assistance for local not-for-profits. The report also notes that technology has been a good tool to "support connections already made rather than building new connections."

Should The Cummings Foundation choose to support its grantees by experimenting with alumni initiatives, this would send an encouraging message to those grantees who fear that -- in the words of one organizer -- there is a collusion between funders and organizers to keep "doing more for more and more people." An alumni support mechanism would, by contrast, allocate resources to sustain the people who are already "counted."

Since many of the original program experiences that forged these cohorts were powerful, even transformative experiences, it would seem to be wise to test alternative ways of further developing the leadership and activist capacities of these program participants. During this experimental period, The Cummings Foundation would evaluate the effectiveness of varying approaches to working with alumni. Equally important would be to document the lessons that could be learned and to share them with groups both within and outside the Jewish progressive world.

Should The Cummings Foundation chooses to identify an alumni component as a worthy program initiative, there is a great deal of information that is available through Leadership Learning Community and existing alumni programs that can inform the design of this initiative.

## **Program Option Two**

### **Evaluation and Documentation: Unleashing the Power of Lessons Learned**

One of The Cummings Foundation's greatest strengths is its effective partnership with grantees. The Jewish Life Program Director has played a critical role in helping organizations step back and reflect on their past accomplishments and forecast their future opportunities. This collaborative approach has helped the grantees develop good

institutional habits. For example, even in its first year, The Spirituality Institute has conducted an evaluation of the program's influence on the participating rabbis; their next steps in the evaluation process will include an assessment of the program's visible effects in the workplace. Likewise, Daniel Sokatch spoke with gratitude about the opportunity The Cummings Foundation gave him to launch the thoughtful planning process at Progressive Jewish Alliance that resulted in a multi-year strategic plan for the organization.

One simple but powerful way that The Cummings Foundation can help grantees expand their capacity to learn and lead is to establish a fund for evaluation, documentation and dissemination of lessons learned from the field. This is especially important in a time of severe financial constraints. By supporting a consistent and rigorous approach to documentation and evaluation and creating mechanisms to communicate ideas that emerge from these assessments, The Cummings Foundation will enhance the strategic capacity of these groups and the sustainability of their efforts over time.

In terms of evaluation, The Cummings Foundation might turn to the "cluster model" approach employed by the Kellogg Foundation's Leadership Program for Community Change. By integrating a coherent, consistent evaluation model with common indicators, The Cummings Foundation will have the opportunity to learn beyond each cohort's specific agenda and understand the cumulative impact of these programs. A cluster evaluation model also will bring The Cummings Foundation in a structured learning partnership with its grantees and help to synthesize the aggregate of what the organizations are learning over time.

### **Future Directions: The Working Group Project**

Jewish support for a host of progressive causes has been eroded effectively by the right-wing organizations sustained, focused approach to building support for its agenda. The result is that advocates for causes ranging from economic justice to environmental safety have been forced into a reactive position, to defend basic rights. Such activity is essential, but the energy and effort required to preserve dwindling freedoms detracts from the creation of positive programs, policies and messages that would capture the support of the American public. As Lisa Goldberg of the Revson Foundation suggests, "It is critical to step back and bring the best minds together to work collaboratively on a common agenda." She notes that this will require strong-minded advocates to subsume their individual issues and agendas for the greatest good. Equally important is to create an environment where we "support a variety of efforts, mechanisms and methods, scrupulously selected and rigorously evaluated, because none of us know for certain what will have the greatest impact."

What kind of context would support the creation of a brain trust that both invites collaboration and allows for experimentation? What might be the value of bringing together the "best and the brightest" to harness their ideas? As one of our leaders asked, "What would make it really worthwhile for me to put what I have to do aside, is to work

collaboratively with others outside of my ‘insular’ world? How do you manage the conundrum, that the “best and the brightest don’t play well with others?” What might be the role of funders in this kind of endeavor?

These are questions that helped draw our attention to the work of the Aspen Institute Policy Program and their innovative program that used a working group model to understand the field of micro-credit and leverage new strategies in the field. A group of not-for-profit organizations, funders, and evaluators collaborated over five years to learn about the field, test new strategies against the pragmatic realities, evaluate their efficacy over time, and revise initiatives. The learning that resulted from this five-year effort was useful not only to the project participants, but to hundreds of other organizations who benefited from their data that was widely disseminated.

We suggest that one future program direction for The Cummings Foundation might be a long-term “Working Group Project.” The main outlines of the project might resemble the Aspen program, particularly the commitment to an extended timeline, the dynamic circuitry between learning and practice, and the participation of additional funders in the process.

Other program design elements might be adjusted to serve the strategic interests of The Cummings Foundation. First, we would suggest that The Cummings Foundation consider an alternative to the customary practice of selecting the “best and the brightest” individual organizational leaders; rather the Foundation might consider building the working group with “teams” from selected Jewish social justice groups. These organizational teams – including the executive director, at least one other staff member, board trustees and volunteer leaders -- would serve to “root” the cohort model within each organization and build nascent leadership.

Second, we would recommend that The Cummings Foundation and its funding partners allocate sufficient funds toward the general operations of the participating organizations, such that the working group project enhances, rather than drains, the institutional capacity of these groups. Third, we would recommend that the working group project match teams drawn from the Jewish social justice world with teams from other like-minded organizations outside the Jewish communal arena. The resulting working group would strengthen the role of the Jewish community in interfaith coalitions and would enrich the texture of the discussion around the issue of common concern.

The Cummings Foundation might test alternative approaches to assembling the working group: the Foundation might assemble groups within disciplines or across disciplines, or convene a work group composed of interfaith community-based teams. For example, if The Cummings Foundation decides to convene a work group to address community service as an essential part of Jewish identity, the work group might include, in addition to selected The Cummings Foundation grantees, Americorps, the Peace Corps, or Habitat for Humanity. Bringing together “unexpected” teams also might be useful; for example: bringing in a team of media-savvy communications strategists, documentarians, or

investigative journalists who would help the working group shape a project that would attract media attention and thus, amplify the effectiveness of its work.

The critical factor for building and convening each work group would be a joint issue that is of passionate importance to all the participants. The Cummings Foundation might choose among different themes for its working groups: building local advocacy efforts; developing models for strengthening corporate social responsibility and accountability; the impact of community service on Jewish communal values; new ways of involving faith-based communities in living wage campaigns. By way of example, the Jewish Fund for Justice low-wage worker project might be expanded as an interfaith effort through the working group model.

The working group project would begin with strategy development, followed by pilot projects to test assumptions and new ideas, with subsequent iterations of evaluation, revision and implementation. The lessons learned would be shared throughout with the working group. The working group process might benefit as well by a program, through the Rockwood Foundation or Advocacy Institute, to strengthen the participants' leadership capacity, both on the individual and team levels. This component would support each team's "stretch" into new territory as well as leverage what has been learned about the inextricable link between personal development and public activism.

The role of The Cummings Foundation in the Working Group Project would be to provide the "safe place" for collective inquiry and the appropriate resources for developing strategies, testing new programs in the field and evaluating their success. We would strongly urge the participation of additional funding partners from the outset, to ensure that there is sufficient support to develop and revise these projects over an extended time horizon.

The benefits for working group participants could include: a) additional leadership development; b) participation in a learning laboratory for building teams and collaborations, particularly useful for interfaith and other multi-cultural efforts; c) increasing opportunity for institutional and field impact; d) the satisfaction of creating a joint enterprise with practical and profound synergies, and e) integrating evaluation, reflection and feedback into the work habits of activists.

As The Cummings Foundation strives to break down programmatic "silos" within its internal structure, the Working Group Project offers potential for participant teams to learn from one another, support one another and increase their cumulative potential for impact. The projects developed and implemented by such work groups might help unleash new creativity and vibrancy in the Jewish progressive world while serving as a model for the complex, collaborative leadership that building great teams demands and inspires.

# REPORT TO THE NATHAN CUMMINGS FOUNDATION

## “Cohorts: How They Learn, Lead and Influence”

### Appendix

***In Their Own Words:*** A description of the organizations and programs whose professionals generously gave their time and wisdom in interviews for this report.

#### **American Jewish World Service (AJWS)**

American Jewish World Service (AJWS) is an independent not-for-profit organization founded in 1985 to help alleviate poverty, hunger and disease among the people of the world regardless of race, religion or nationality. It breathes life into Judaism's imperative to pursue justice by helping American Jews act upon a deeply felt obligation to improve the chances for survival, economic independence and human dignity for all people. AJWS partners with local grassroots non-governmental organizations engaged in education, community building, health care, agriculture reform and economic development, and initiates projects to alleviate poverty. Ruth Messinger is the Executive Director.

#### **Andrea and Charles Bronfman Philanthropies**

The Andrea and Charles Bronfman Philanthropies is a family of charitable foundations operating in Israel, the USA and Canada whose mission is to develop, implement and support initiatives that help to strengthen the unity of the Jewish people. Roger Bennett is Vice President of Strategic Initiatives and Sharna Goldseker is Director of Special Projects.

#### **The Aspen Institute Policy Programs**

The Aspen Institute is a global forum for leveraging the power of leaders to improve the human condition. Through its seminar and policy programs, the Institute fosters enlightened, morally responsible leadership and convenes leaders and policy makers to address the foremost challenges of the new century. The Aspen Institute Policy Programs have achieved an international reputation as effective and impartial for a constructive dialogue on significant policy issues. The Policy Programs seek to improve public and private sector policy decision making by providing a neutral venue for leaders to engage in informed dialogue and inquiry on the complex, important issues of our time. Peggy Clark is the Executive Vice President for Programs.

### **AVODAH: The Jewish Service Corps**

AVODAH offers a year-long program combining front-line anti-poverty work, Jewish study, and community building. It provides an opportunity live out and deepen one's commitments to Jewish life and social change through a year of work in low-income communities in New York City or Washington, DC. Rabbi David Rosenn is AVODAH's Executive Director.

### **Bronfman Youth Fellowships**

Jewish teenagers in the U.S. and Canada, entering the twelfth grade of school, are recipients of the Bronfman Youth Fellowships. They spend five weeks of study, dialogue and travel in Israel. The purpose of the Fellowships is for students to return home with a new understanding of the myriad issues facing the Jewish people and the Jewish state, and a new appreciation of the need for dialogue among Jews of all kinds. Rabbi Diane Cohler-Esses is the Senior Educator.

### **CLAL – The National Jewish Center for Learning and Leadership**

CLAL stimulates volunteer, professional and rabbinic leadership to build responsive Jewish communities across North America. It helps individuals imagine new Jewish possibilities and promotes inclusive Jewish communities in which all voices are heard. CLAL convenes interdisciplinary conversations that explore the Jewish and American futures as well as enhancing Jewish participation in civic and spiritual life in North America. CLAL was founded by Rabbi Irving (Yitz) Greenberg, Elie Wiesel and Rabbi Steve Shaw. Rabbi Irwin Kula is the current President.

### **Echoing Green**

Echoing Green was founded over a decade ago by the leadership of General Atlantic Partners, a global private equity firm. As one of the earliest practitioners of venture philanthropy, a relatively new approach to philanthropy, Echoing Green has emerged as the premiere organization providing early stage funding to emerging social entrepreneurs around the world. It believes that social entrepreneurs are critical global change agents and deserve support. Over the past 15 years, Echoing Green has awarded more than \$20 million to over 350 social entrepreneurs and their groundbreaking organizations around the world. Lynn Rothstein is the Executive Vice President.

### **Fast Company, Company of Friends**

Launched in November 1995, Fast Company magazine was founded to address the global revolution that was changing business, and how business was changing the world. Discarding the old rules of business, Fast Company chronicled how changing companies create and compete, to highlight new business practices, and to showcase the teams and individuals who are inventing the future and reinventing business. Heath Row is Associate Editor of The Company of Friends, Fast Company's global readers' network that enables readers to connect, collaborate and communicate.

### **The Ford Foundation, Leadership for a Changing World**

LCW provides opportunities for advanced study to exceptional individuals who will use this education to become leaders in their respective fields, furthering development in their own countries and greater economic and social justice worldwide. A major new program of the Ford Foundation, Leadership for a Changing World seeks to stimulate a public conversation that recognizes that leadership comes in many forms and from many different communities. Marion Krauskopf is the Project Coordinator for the Office of the Vice President.

### **The Ford Foundation, International Fellowships Program (IFP)**

The Ford Foundation International Fellowships Program (IFP) was launched by the Ford Foundation in 2000 to provide opportunities for advanced study to exceptional individuals who will use the education to become leaders in their respective fields, furthering development in their own countries and greater economic and social justice worldwide. To ensure that Fellows are drawn from diverse backgrounds, IFP actively seeks candidates from social groups and communities that lack access to higher education. Joan Dassin is the Executive Director.

### **Genesis, Brandeis University**

Genesis presents Jewish high school students with the unique opportunity to spend four weeks living in a diverse community. Participants negotiate ways of living together and learning from each other. It strives to create a safe environment that encourages exploration and personal development. Encountering the unexpected, participants learn the most about who they are as individuals, as Jews, and as citizens in a broader society. Those entering 11<sup>th</sup> or 12<sup>th</sup> grade are eligible to apply. Simon Klarfeld is its Founding Director.

### **Jewish Fund for Justice (JFJ)**

The Jewish Fund for Justice is a national, publicly-supported foundation that acts on the historic commitment of the Jewish people to *tzedakah* (righteous giving) and *tikkun olam* (repair of the world). JFJ believes that their commitment to combating poverty in the U.S., and the injustices underlying it, is an essential part of Jewish core identities and values. Marlene Provizer is CEO and Executive Director.

### **Jewish Funders Network (JFN)**

The Jewish Funders Network is an international agency that provides leadership, programs and services to help Jewish grant makers be more effective and strategic in their philanthropy. JFN members understand that their philanthropy goes much deeper than the act of writing a check. Together, they collaborate and plan so that their money can be used to effectively change the world. The basis for all JFN programs is the textured world of Jewish values and identity that grant makers apply to whatever funding decisions they make. Mark Charendoff is President.

### **Jewish Organizing Initiative (JOI)**

The goal of JOI is to create opportunities for Jewish young adults to work for social justice as trained grassroots community organizers, and to model a pluralistic Jewish community that values Jewish learning, relationship building and justice. JOI provides full time paid professional jobs (salary \$18,000 per year plus health insurance and benefits) to about twelve young adults (ages 22-30) each year in Boston, MA. The JOI fellows work for a year at these jobs and also take part in weekly reflection sessions in on community organizing, social justice, Jewish tradition, as well as several community building retreats throughout their year with JOI. Michael J. Brown is its founder and director.

### **Jewish Social Justice Network**

Established in 2000, the Jewish Social Justice Network is a consortium of organizations working to promote the involvement of Jews in social justice work through a variety of methods, including community organizing, advocacy, activism, training and education. The participating groups and the Network are non-partisan, non-profit, and reach out to Jews across the spectrum of Jewish affiliation and identity. Cindy Greenberg is Project Director.

### **Joshua Venture**

Joshua Venture helps emerging Jewish social entrepreneurs transform their visions into action. It trains and supports a new generation of leaders whose innovative projects or “ventures” contribute to a just, vibrant, and inclusive Jewish community. Brian Gaines is the founding Executive Director.

### **The W.K. Kellogg Foundation**

The W.K. Kellogg Foundation is a nonprofit organization whose mission is to apply knowledge to solve the problems of people. Its founder, W.K. Kellogg, the cereal industry pioneer, established the Foundation in 1930. Since its beginning the Foundation has continuously focused on building the capacity of individuals, communities, and institutions to solve their own problems. Rick Foster is past Vice President for Leadership Programs.

### **Kolot: The Center for Jewish Women's and Gender Studies**

Kolot offers a new angle of vision on Jewish life. An interdisciplinary center dedicated to furthering our understanding of gender as a fundamental category of the social and cultural analysis of Judaism, Kolot functions as both an academic and an activist center. As an academic center, Kolot furthers scholarship and trains rabbis and other Jewish leaders. As an activist center, Kolot generates innovative projects and practices which affect the religious and spiritual lives of today's Jews. In 2001-04 Kolot's primary national projects are *Ritualwell.org*, a website of contemporary Jewish holiday and lifecycle rituals, and *Kolot's Rosh Hodesh: It's a Girl Thing!* a unique program for adolescent girls which fosters self-esteem and enhances Jewish identity. Sally Gottesman is the Chair.

### **Leadership Learning Community**

In 1998, The W.K. Kellogg Foundation and the James McGregor Burns Academy of Leadership convened the first gathering of 20 leadership development programs to engage in collective learning and explore opportunities for collaboration. Participants called for the formation of a sustainable learning community to continue their work. Representatives from 30 leadership programs and 10 foundations met to define the work of this community and formally launched the Leadership Learning Community. Deborah Meehan is the Director.

### **The MacArthur Fellows Program**

The MacArthur Fellows Program awards unrestricted fellowships to talented individuals who have shown extraordinary originality and dedication in their creative pursuits and a marked capacity for self-direction. Fellows are selected based on their exceptional creativity, promise for important future advances based on a track record of significant accomplishment, and potential for the fellowship to facilitate subsequent creative work. Daniel J. Socolow is the Director.

**Partnership for Excellence in Jewish Education (PEJE)**

A collaborative initiative of major philanthropic partners, PEJE is designed to strengthen Jewish day school education in North America. Through grant making, expertise delivery, and advocacy, PEJE works to assist individual schools, promote excellence in the field at large, and increase awareness and support of day schools in the broader Jewish community. Rabbi Dr. Josh Elkins is the Executive Director.

**The Progressive Jewish Alliance (PJA)**

The Progressive Jewish Alliance is a national membership organization dedicated to the Jewish traditions of pursuing peace, promoting equality and diversity, and ensuring social and economic justice. It serves as an outspoken advocate and participant in the struggle for many social, racial, gender, ethnic, economic and environmental justice issues. Daniel Sokatch is the Executive Director.

**The Charles H. Revson Foundation**

The Foundation was founded in 1956 by Charles H. Revson, the founder of Revlon, Inc., as a vehicle for his charitable giving. The Foundation's giving reflects the founder's own personal commitment, "to the spread of knowledge" and "the improvement of human life." The board established four program areas: in urban affairs, education, biomedical research policy, and Jewish philanthropy and education. The board also identified as priorities four themes: the future of New York City, the accountability of government, the changing role of women, and the impact of modern communications on education and other areas of life. Lisa Goldberg is the Executive Vice President.

**Rockefeller Fellows Program, The Next Generation Leadership (NGL)**

The Next Generation Leadership (NGL) program was created by the Rockefeller Foundation in 1997 out of a commitment to building a stronger, more sustainable democracy for the United States in the 21st century. NGL is based on the premise that future leadership can be identified and connected to develop solutions to the most difficult problems facing the United States and the world. NGL seeks to create an active and highly diverse network of leaders who are entrepreneurial, risk-taking and fair and who seek to develop solutions to major challenges of democracy, including issues of race, changing demographics, the digital divide and massive globalization. Surita Sandosham is the manager of the NGL program.

**Rockwood Leadership Program**

The mission of the Rockwood Leadership Program is to deliver effective and transformational organizational development trainings to public interest professionals. The Rockwood program is designed to serve people and organizations that have demonstrated leadership experience in the public sector, including environmental activists, foundation and philanthropic professionals, social justice and human rights workers, as well as public health, child welfare and other social reform advocates. Jennifer Cobb is the Program and Development Director.

**The Spirituality Institute at Metivta**

The Spirituality Institute at Metivta is a multi-faceted series of programs customized to key constituencies within the Jewish world. The aims of The Spirituality Institute are to help participants deepen their own spiritual lives; to help them deepen the spiritual lives of others; and to increase the value and support that Jewish institutions give to the life of the spirit. Rabbi Nancy Flam is the Founder and Director.

**Synagogue 2000**

Their mission is to be a catalyst for excellence empowering congregations and communities to create synagogues that are sacred, vital centers of Jewish life. In 1995, co-founders Rabbi Lawrence Hoffman and Dr. Ron Wolfson, with input from leading clergy, cantors, educators and change management professionals, made their vision of synagogue life in the 21st century the basis of a new national institute. Since its founding, Synagogue 2000 has worked with 95 North American congregations organized into six national and regional cohorts. Dr. Ron Wolfson is the co-founder.

**Threshold Foundation**

Threshold is a community of individuals united through wealth and a progressive vision, mobilizing money, people and power to create a more just, joyful and sustainable world. It provides a place where people with significant financial resources, a commitment to social change and an interest in their own emotional, psychological, and spiritual development can come together to scheme, dream, learn, work, play and see what happens. The Threshold Foundation serves the social change movement through collaborating with and funding innovative nonprofit organizations and individuals working towards social justice, environmental sustainability, humane economic systems and peaceful coexistence. Lucinda Ziesing is a member of the Foundation.

**Young Communal Professionals**

Young Communal Professionals was an informational network of mid-level Jewish professionals. Members were interviewed for this study.

**The Wexner Foundation Graduate Fellowship Alumni Institute**

Wexner Graduate Fellowship Alumni meet annually for institutes planned by the Foundation in partnership with an Alumni committee. In addition to peer teaching, Alumni study and dialogue with leading scholars, practitioners, and experts in the fields of Jewish life and leadership development. Cindy Chazan is the Director of Alumni and Community Development.

**Wexner Heritage Foundation**

The Wexner Heritage Foundation educates Jewish communal leaders in the history, thought, traditions and contemporary challenges of the Jewish people. It seeks to expand leadership vision, deepen Jewish values, and bring a Jewish language of discourse to policy and decision-making in the community. Rabbi Shoshana Gelfand is Vice President.