

Cultivating the Talent: Women Professionals in the Federation System

A RESEARCH REPORT

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The mission of Advancing Women Professionals and the Jewish Community (AWP), a national nonprofit organization, is to advance women into leadership in Jewish life; stimulate Jewish organizations to become productive, equitable, and vibrant environments; and promote policies that support work-life integration and new models of leadership.

AWP seeks to leverage the talents of women on behalf of the Jewish community and to act as a catalyst for change. AWP has found that identifying the systemic barriers that prevent women from advancing, leads to discovering the challenges that exist for everyone in the workplace – women and men, professionals and volunteers. Through research, pilot projects, advocacy, and publications, AWP is removing barriers and helping Jewish organizations establish policies and practices that expand opportunities for everyone.

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EXECUTIVE SUMMARY

This report, *Cultivating the Talent: Women Professionals in the Federation System*, results from an AWP study commissioned by the UJC in November 2006.

The study was launched with an email survey of 950 women federation professionals in UJC's database. The email survey posed two questions: "*Are you interested in advancing to a more senior position in federation?*" and "*Would you be willing to discuss your professional aspirations in a follow-up phone conversation?*"

In response to this email, 130 women affirmed that they sought advancement to senior positions in federation and agreed to participate in a telephone interview. The interviews with this self-selected sample of women professionals focused on their career aspirations and the resources that might help them to achieve their stated goals. The women who participated in this study represent a wide range of professional positions and functional departments from 47 federations of varying sizes and locations across North America.

The central finding of the study is that these women professionals aspire to diverse leadership roles in the federation system, as well as in other Jewish agencies. Most noteworthy is that 21 women out of the 130 interviewed (16%) aspire to become federation CEOs. A significant number of professionals in this sample can envision themselves as federation COOs, Campaign Directors and other senior management positions, and as CEOs of other Jewish agencies. Their high aspirations manifested throughout the life-cycle continuum, including women with and without children, married and single women, and women with grown children, both single and partnered. This finding was represented across all professional levels and functional roles, and across all federation sizes and locations. Only 15 women said they felt unsure about their long-term career aspirations.

Our interviews explored the contributing factors to professional growth thus far. Federations were credited for providing on-the-job learning, good supervision, and special projects that accelerate learning and build relationships with professional and lay leadership. Many women also recognized self-motivation and community visibility as critical elements of successful federation careers.

Asked what professional resources would support their career aspirations, the majority of women professionals called for mentoring and networking within the system; off-site learning opportunities; on-the-job coaching; and high-visibility assignments. Many women seek greater expertise in fundraising development, fiscal management, and strategic planning. Among more discrete skill sets, these professionals cited the need for training in negotiation, conflict resolution, and public speaking.

While this study focused primarily on future career aspirations and needs, the interviews briefly explored obstacles that have been experienced along the career path. The most commonly cited barriers to advancement were a lack of clear career pathways, limited job

openings at the highest ranks, work-life issues, and gender bias, particularly in the area of compensation.

The study concludes with recommendations that address three broad areas: *first*, public support for women's career aspirations, beginning with broad distribution of this report; *second*, sequenced career planning, through pilot projects at selected federations, and *third*, policy development for workplace flexibility over the career trajectory. By sharing the findings of this study and pursuing these recommendations, UJC will send a positive message to women federation professionals – about its commitment to leverage existing strengths, address systemic barriers, and cultivate the talent of women professionals on behalf of the federation system and the Jewish community.

I. INTRODUCTION

The goal of this project was to identify women federation professionals who aspire to leadership positions and to learn from them what individual and systemic resources might help them reach their goals.

This report builds upon organizational knowledge that has been developed through previous studies of the federation system and the larger Jewish communal sector. These include: AWP-UJC's *Creating Gender Equity and Organizational Effectiveness in the Jewish Federation System* (Cohen et al., 2004); *The Jewish Sector's Workforce: Report of a Six-Community Study* (Kelner et al., 2005); *Recruiting and Retaining a Professional Work Force for the Jewish Community* (Kelner et al., 2004), and *Gender and the Federation Executive Search Process* (2007), by Jessica Bell, Senior Director for Education and Training at UJC's Mandel Center for Leadership Excellence. These studies provide context for understanding workplace conditions within federations; specifically, motivations for entering the communal sector, factors that contribute to professional satisfaction or dissatisfaction, and gender-related career constraints.

Other communal studies have taken a broad view of current conditions, surveying as many as 1400 workers in a diverse array of Jewish organizations. By contrast, this study focuses closely on a self-selected sample of 130 women professionals in 47 federations who responded to an email query about their interest in advancing to more senior levels. In subsequent telephone interviews, these women discussed their career aspirations and needs. As such, this study was designed to help UJC and the federation system develop effective resources for aspiring women professionals.

II. METHODOLOGY

A. OUTREACH

In June 2006, AWP-UJC reached out via email to 950 women federation professionals in UJC's database. The email survey posed two questions: "*Are you interested in advancing to a more senior position in federation?*" and "*Would you be willing to discuss your professional aspirations in a follow-up phone conversation?*"

A total of 184 women professionals responded to the initial email query – 158 women professionals who responded affirmatively about career advancement and 26 women who wrote that they were not interested in career advancement. In November 2006, UJC commissioned AWP to develop this study with the women professionals who had responded affirmatively to the initial query. A total of 130 women professionals agreed to participate in the study, by engaging in a 30-minute telephone interview with the AWP research team. The interview protocol invited the respondent to reflect on her

professional experiences to date and to discuss future career goals. The interviews were conducted from November 2006 through January 2007.¹

B. INTERVIEW PROTOCOL

Professionals at AWP and UJC designed the interview protocol, with guidance from AWP Research Director Steven M. Cohen. Telephone interviews were conducted by Didi Goldenhar, Senior Consultant to AWP; Sivanie Shiran, Director of Leadership Programs; Dana Schneider, Consultant, and Audra Berg, Former Program Director.

Interview questions addressed professional background, career aspirations, professional needs, and career constraints. The interview protocol relied largely on open-ended questions, supplemented by several checklists that addressed categories for professional development. (*See Appendices for interview protocol.*)

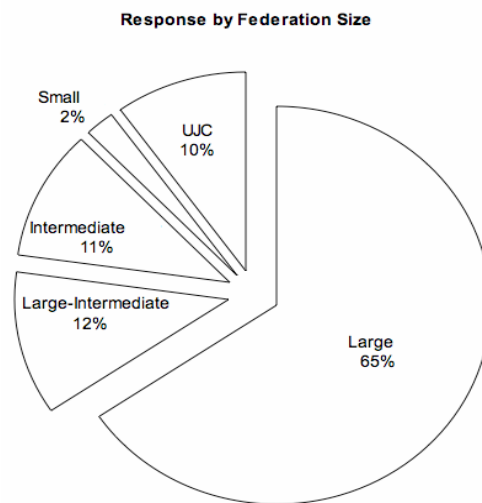
The core purpose of the interview was to elicit, from the respondents' perspective, what experiences and resources would support their career aspirations. As such, the interview itself functioned as a positive intervention, by encouraging these women federation professionals to think strategically about their career goals.

C. INTERVIEW RESPONDENTS

1) Federation Size and Location

The 130 interview respondents in this study represent 47 federations, including 23 states and three communities in Canada. Professionals from the national UJC office also participated in the study. Federations of every size are represented: (*See Appendices for complete list of respondent federations.*)

- 18 large federations
- 12 large-intermediate federations
- 12 intermediate federations
- 3 small federations.

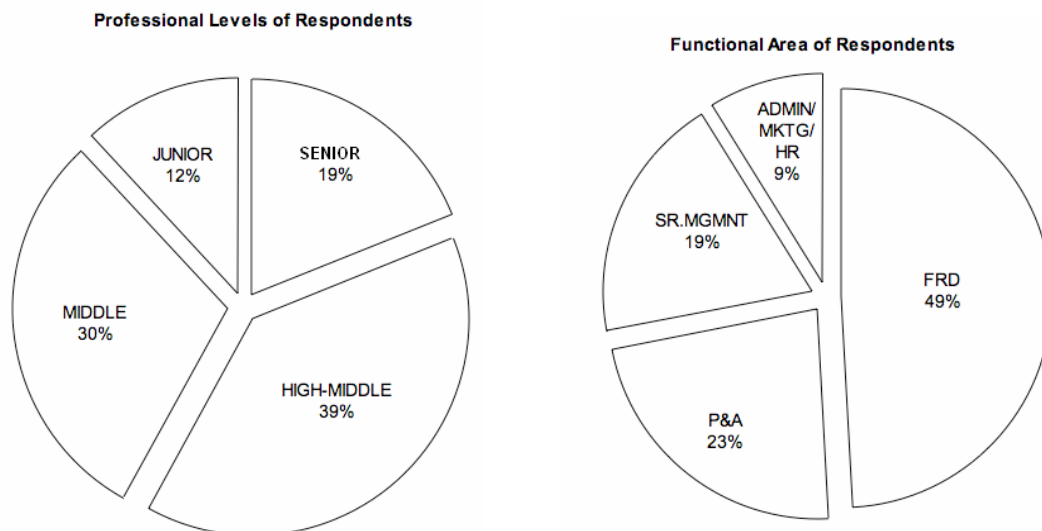


¹ This study is based on qualitative research conducted with a self-selected sample of women professionals employed by the federation system of North America. These women identified themselves as “aspiring to advancement” and as such, were invited to engage in an interview about career aspirations and professional development needs. The results provide a rich picture of their perceptions, both of themselves and their work environments. While the findings offer valuable insights about this sample of aspiring women professionals, they do not presume to represent the perspectives of women professionals who chose not to participate in the study.

The majority of women professionals in this study (85) are employed by large federations. Women from large-intermediate (15) and intermediate-size federations (14) contributed valuable intelligence, as did the respondents from UJC (13). Relatively few women (3) responded from small federations.

2) Functional Role

The sample group represents the full range of federation job titles. Most of these women (49%) are employed in fundraising positions, followed by professionals in planning and allocations (23%). Women in cross-functional, senior management positions constitute 19% of the respondent sample. Fewer women professionals (9%) responded from departments dedicated to human resources, marketing, operations and IT. (*Note: In the functional chart below, “Senior Management” refers to high-rank, cross-functional positions, e.g., CEO or Associate Executive Vice-President.*)



3) Professional Level

The women in this sample represent every professional level. The largest group (39%) holds titles in the high-middle ranks, i.e., as department directors; 30% place in the middle ranks as associate and assistant directors. About 19% of these professionals serve as Executives of small federations or as Vice-Presidents or comparable sub-Executives of large or large-intermediate federations. The smallest group (12%) represents junior-level staff holding associate-level positions².

² Personnel rankings are consistent with UJC annual Position Reports, per Professor Steven M. Cohen's classifications of the eight "most valued job titles": 1) CEO; 2) COO/Assoc. Executive Vice-President; 3) Asst. Vice-President; 4) Chief Financial Officer; 5) FRD Director; 6) Endowment Director; 7) Campaign Director, and 8) Planning Director. For this study, Positions (1) through (4) were classified as "senior management" and Positions (5) through (8) as "high-middle." The purpose was to show the significant percentage of women in this sample who already occupy leadership positions on the departmental level.

4) Entry into Federation and Jewish Communal Service

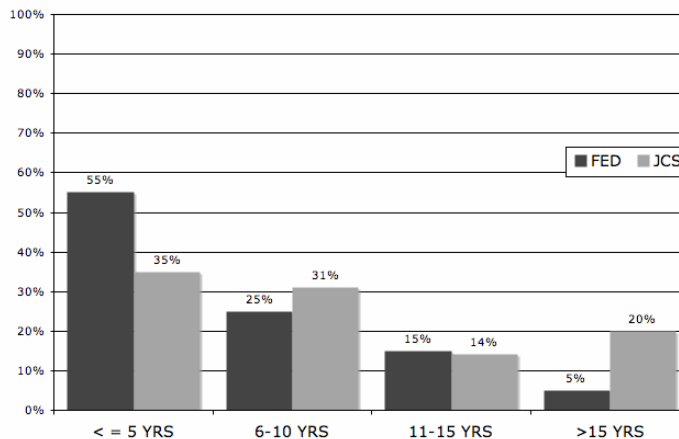
After identifying functional roles and titles, we asked our respondents, “*Why did you enter the Jewish communal service field and this federation in particular?*” Our purpose was to explore the motivations which these professionals bring to their federation careers.

A six-community study of the Jewish workforce by Kelner et al (2005) categorized the personal motivations linked to entry into the Jewish communal field, ranging from professionals who have been affiliated since the teenage years, to those who transitioned into communal jobs; for example, from other fields or from raising a family. Kelner’s study examined the relationship of initial motivation to workplace satisfaction and to patterns of employment *migration* (within the communal sector) and *attrition* (exit from the communal sector). Similarly, we asked our respondents about their motivation for entering federations and the communal sector, to provide a more textured understanding of career and leadership goals.

More than half of the women in this self-selected sample cited their dedication to the Jewish community as the primary motivation for entering their federation and communal service. The word *passion* surfaced frequently in their reflections, whether they had been raised in a federation family, pursued a personal interest during high school or college, or served as a lay leader. About 16% of the group had entered federation life after prior careers in the private or secular nonprofit sector. Some women had spent several years at home raising their children and explicitly linked their re-entry to the workforce with their desire for a meaningful professional life. Other factors, aside from deep commitment to the Jewish community, included moving to a city with family connections; (31%); an attractive job opening (35%), and prior volunteer involvement (15%).

5) Tenure in Federation and Jewish Communal Service: More than 50% of these professionals have been employed at their current federation for five years or less. The vast majority (81%) have been employed at their current federation for ten years or less.

Tenure Level in Federation & Jewish Communal Service



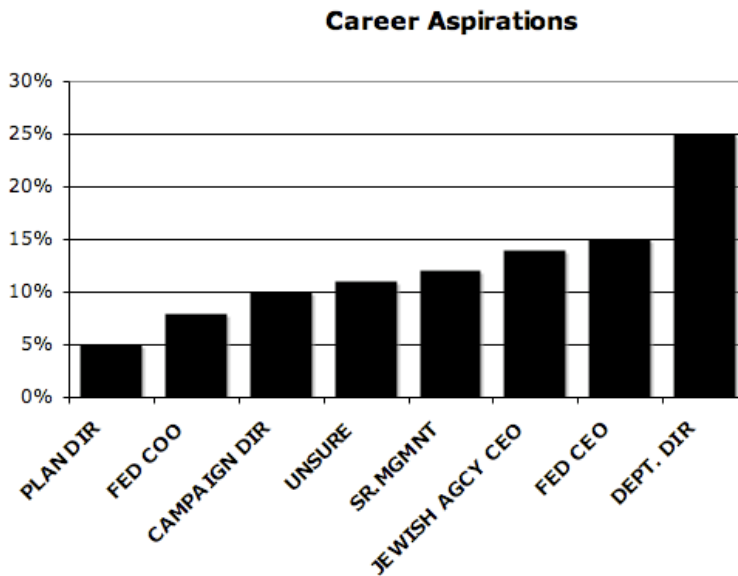
We also asked our respondents about tenure in Jewish communal service, including other federations, Jewish agencies, day schools, Hillels, and local and national communal organizations. Here, the length of tenure appears to be more evenly distributed, suggesting that these women professionals tend to *migrate* among jobs within the Jewish communal sector.

III. FINDINGS

A. CAREER ASPIRATIONS

1) The women professionals in this study aspire to significant leadership positions in the federation system and in the Jewish communal sector.

We asked our respondents, “*In what capacity would you like to be working 3-5 years from now? And, what is your long-term career objective?*”



The primary finding of this study is that more than 100 women professionals (of the 130 in this self-selected sample) seek advancement to significant leadership positions, both within the federation system and throughout the communal sector. The job titles to which they aspire include: federation CEOs, federation COOs or Vice-Presidents, agency CEOs, campaign directors, planning directors, and department directors. Notable to this study is that 21 women in this sample stated that they aspire to become federation CEOs.

The desire to advance into leadership roles held true across functional departments and professional levels, and across federation size and location. This finding also held true for single and married women without children, married women with children at home, single mothers, and women with grown children. In other words, leadership aspiration stretched across the career life cycle, notwithstanding differences in how the career timeline was charted. (Several women in high ranking positions said they did not wish to advance as they do not wish to relocate or that they plan to retire within 1-3 years.)

2) Women federation professionals aspire to a diverse range of leadership roles.

Our question about short and long-term career aspirations invited our respondents to volunteer more than one leadership goal. Most of these professionals said they could envision themselves in several positions. For example, 20 women said they could envision themselves as the CEO of a Jewish agency; some of these women also said that they could aim for the COO of a large federation.

Many women seemed compelled to explain why they did *not* want to become federation CEOs. For these professionals, the CEO role, with its relentless public demands, does not offer a reasonable balance of meaningful work and decent family life. The CEO position was described variously as “24/7,” or a “dog and pony show.” These women, many of them already in senior positions, viewed the COO role as offering more autonomy to do creative work in their federations and community. As one senior-level professional said, “*Number 1 is about always campaigning for your office. Number 2 is about governing.*”

3) Many women federation professionals articulate “career advancement” as the sequential pursuit of professional excellence and community influence.

When asked about short-term goals (3-5 years), most respondents emphasized their intention to improve effectiveness and achieve maximum impact in their current positions. They also spoke of advancing within their departmental and federation hierarchies; for example, younger professionals spoke of moving up from their associate-level roles, mid-level professionals sought to achieve leadership of their departments, and higher-level professionals identified the senior management group as the next step.

Many respondents spoke of their goals in expansive ways that transcended new titles or steps in the federation hierarchy. They expressed a preference for creating positions that would permit them to expand the vision for their departments, give them a greater degree of autonomy and offer them a seat at decision-making tables.

I can't just say that I want to be promoted. Here you have to name the job. You have to say, “This is the position I want, and here is what I envision for that position.” - Senior manager, Toronto

While most interview respondents articulated an impressive degree of ambition, 15 of these professionals said that they felt unsure about long-term aspirations. For some of these women, the interview itself functioned as a stimulus, calling up the need for individual career planning. For quite a few women, this question led to the subject of work-life challenges. For others, this question spoke to their federation's human resource challenges, respective to professional development or leadership succession issues.

B. PROFESSIONAL GROWTH TO-DATE: EXISTING OPPORTUNITIES

We asked our respondents to reflect on what factors, professional and personal, had leveraged their growth thus far. This self-selected group was highly articulate about the opportunities they had been offered, and the opportunities they had made for themselves.

The most commonly-cited factors included: **learning the job, good supervision, special projects, professional development, and self-motivation.**

1) Learning the Job: Many of these women professionals say that they are growing professionally within their positions. Nearly everyone spoke first about the importance of “learning the job” and developing expertise in their functional areas – especially fundraising, management and supervision, and strategic thinking.

Women also cited their increased understanding about how federations work, specifically lay-professional relations, knowledge of the local Jewish community, and one-to-one solicitation. Women with prior careers in the secular nonprofit or private sector emphasized the primacy of “adapting to the institutional culture.” A few women reported the improvement of discrete job skills or Judaic knowledge.

2) Good Supervision: For many of these women, good supervision has been the key to professional development, either from a current supervisor or CEO, or a past supervisor or CEO. This was a common refrain, both for women whose careers have been spent entirely in the Jewish communal sector and those who come to federations from the private or secular nonprofit sectors.

I meet every six months with my direct supervisor to review my job goals and performance and I get good feedback from her.

Young professional, Atlanta

Very early in my career, [before coming to federation], I had two supervisors who were exceedingly supportive and willing to share the spotlight. I was encouraged to take risks and get beyond my comfort zone in terms of in-depth analysis and public speaking. That was really important.

Senior manager, formerly in corporate finance

My supervisor gives me speaking engagements and exposure to lay leadership. He gives me opportunities to attend staff Cabinet meetings and Board meetings.

Associate director, Chicago

Good supervisors in federations also seem to play an important mentoring function, by providing career advice and role models. Supervisors who bring experience from other federations were seen as particularly useful in this regard.

I was given pivotal advice early in my career that set me on a good path in terms of career development and what experiences I need in order to advance. I've based a lot of my career moves on who is going to supervise me.

FRD professional, UJA-Federation

[My supervisor] saw me from the beginning and made me a professional. She is a role model with drive, honesty, and forward thinking, a brilliant woman who knows how to navigate the system effectively. She knows how to pick the right staff and her staff has great retention.

Mid-level professional, Chicago

In those federations that lack formal mechanisms for career planning, good supervision is critical. As one woman VP noted, *"I have huge aspirations and I have evolved in my career, but professional growth is a huge challenge because there is no clear path. I was lucky because I had a manager who was committed to my professional growth."*

3) Special Projects: Leading or serving as a team member on a special federation project offers multiple benefits. For professionals new to the system, coordinating a Super Sunday or planning a gala is like *"jumping in the deep end and learning how to swim."* Many younger professionals spoke of being exposed to such new projects almost continuously. For women at the middle and higher-middle levels, opening a satellite office for a large federation or working on a strategic plan increased expertise, developed leadership capacity and provided substantive access to professional and lay leaders.

The cross-functional value of special projects was cited, both to *"expand the portfolio"* and *"work across the aisle."* This value was noted by fundraisers who had worked on venture philanthropy or donor stewardship and by senior planners who had participated in strategic planning with FRD professionals and lay leaders.

Organizing a high-profile community outreach event with a steering committee of 100 people helped me assess what success looks like.

Campaign professional, Atlanta

I cultivated a new donor, resulting in a gift of \$16-\$20 million which quintupled the size of our foundation.

Senior professional, New Jersey

4) Professional Development: In-House, Local Community and UJC

a) In-house professional development: Overall, the respondents gave their federations mixed reviews for in-house professional development. Some federations received high praise. Several professionals praised the Miami federation's ongoing professional development; one young woman noted, "*Our Young Professionals Group has asked for more 'process supervision' in addition to 'task supervision.'* We also meet monthly with the Campaign Director and occasionally with our ED."

Other women expressed dissatisfaction with their federation's approach to professional development. As one manager said, "*The problem is that we get trained for what's now, not what's next.*" Another manager observed that, at her federation, professional development "*is used as a reward, so if you are someone who needs PD you are not going to get it. This makes no sense.*"

Several women spoke highly of **coaching** which had been made available to them at their federations. In Philadelphia, a coaching initiative was implemented as part of that federation's strategic planning process. As described by a senior-level professional, "*Coaches helped us work through our new roles. It was a very good experience, with an organizational psychologist. I met with the coach every 2-3 weeks for three months, then once monthly for three months. Three women also worked as a group with a coach because they had similar issues. It's the kind of program where you will get out what you put into it.*" Similarly, a UJC professional spoke well of a coach who videotaped her and helped leverage her strengths.

b) External courses and conferences: Several women spoke of increasing their functional skills through local courses and conferences. The challenge of such opportunities is the time they require away from the office. The Washington, DC federation, for example, offers every professional a \$700 annual stipend for professional development, which can be carried over from year to year. However, the sense from our interviews was that, because of the intense workload and high staff turnover, few professionals take advantage of this opportunity.

c) UJC professional development: The interviews revealed the extent to which these women professionals take advantage of UJC professional development. Professionals who work in large-intermediate, intermediate or small federations especially value **conferences** and the **GA** as important venues for networking with colleagues, especially with their functional counterparts from similar and larger size federations.

Missions were valued highly by newer professionals, as a “microcosm” of federation life. One young professional, new to federation life, reflected, “*I went on a Tel Aviv mission for young adults. There were 1200 people from around the world. It was one of the most enlightening and fulfilling experiences that I’ve had at federation, in terms of working with lay people. It was great professional development even though it was not billed as such.*” **CPE** and **Planning Institutes** were mentioned in passing, with mixed reviews; their utility seemed aimed to junior-level professionals.

Among more experienced professionals, two women spoke highly of **UJC’s Executive Development Programs (EDP I and II)**, primarily for the substantive relationships developed with colleagues in the system. As one Vice-President said, “*EDP has given me an understanding of the entire federation community and why some things can work here and not there. I have a network of women that I’ve never had before. My relationships with fellow EDP participants who are also my colleagues have improved enormously. We are really working together effectively.*”

5) Self-Motivation: Many women spoke of self-motivation as the primary driver of their professional growth. Whether they are senior-level managers fluent in the federation culture, mid-level managers with private sector job experience, or junior-level professionals, these women exhibited a sure grasp of their potential and articulated their specific strengths and development needs. These women recognized that career advancement would take more than earnest effort and good work. They spoke of creating professional opportunities for themselves, accessing resources and contacts inside and outside the federation, and inventing new jobs as openings became available.

I have advocated for myself. I have gotten promotions, assignments, exposure and training. Much of this has been my own willingness to step up when someone in my department was promoted out or when someone went on maternity leave. As the opportunity presents itself, I am welcomed to do more.

Mid-level professional, Baltimore

When I first moved into a serious Campaign role, I started writing down, after each event, what I should have done, and the next time I made that change. To grow my division, I did strategic planning and got the right people on board. I learned how to focus on controlling what I could control. I lived by the motto that no one is ever mad at you for being successful.

Senior development professional, Los Angeles

By contrast, other women in this group seemed less sophisticated about what part to play in their own professional growth. They were puzzled about why they had been overlooked for certain projects or expressed resentment about having to ask for professional development.

6) Recognition and Visibility: Our interview protocol asked, “*How well do you feel recognized in your work? In what ways have you been visible to others who might be helpful in your future career?*”

Nearly everyone cited the importance of **recognition** for specific efforts, projects and achievements acknowledged. The findings here were largely positive; more than 50% of these professionals say that their work is valued by immediate supervisors.

In addition, nearly half of this group said that they felt overall **visibility** in their federation community, with broad recognition of their talents and skills by CEOs, lay leaders and colleagues. Tangible examples of this recognition include awards (Employee of the Month, Mentor Award, Emerging Leader), press releases for successful projects, and congratulatory letters and public announcements from the Board President.

Higher-level professionals drew a distinction between visibility on the local level and visibility on the national level. Quite a few women pointed out that, while they feel recognized in their own federation settings, they lack the national visibility required to advance into leadership positions.

Women professionals who seemed more sophisticated about career development spoke of *managing their visibility*, to bring their work forward in the best light, with the right people. In many cases, this is about strategic self-promotion:

I'm getting more contact with senior lay leaders. That is what constitutes recognition in this kind of work. I get some kudos for what I do – or at least my lay leaders do – and that's okay. I also became the go-to person for a lot of things and that is good. Being seen as a resource is some sort of recognition.

Department director, Montreal

I have to promote myself. I can't expect visibility just because of my work. It's a two-way street. I meet and have lunch with managing directors whenever possible.

Middle-level professional, Washington, D.C.

Other women spoke of their skill in managing *varying degrees of visibility*, to navigate their federation cultures more effectively. As one senior professional said, “*I speak up and at the same time I don't speak up. It's a payoff so I can run my own show.*”

Some respondents said that they did not feel visible in their federations. A few women said they preferred *invisibility*. The lay-professional partnership, with its emphasis on the public role of lay leaders, suits their more reticent natures. This reticence sometimes stood in sharp contrast to stated career goals. One high-level professional, determined to become a federation executive, said, “*I don't need public recognition because the people I work with know that I do good work. I show follow-through, excellence and get recognition from lay leaders, one on one. My ED gives me credit in little and big ways.*”

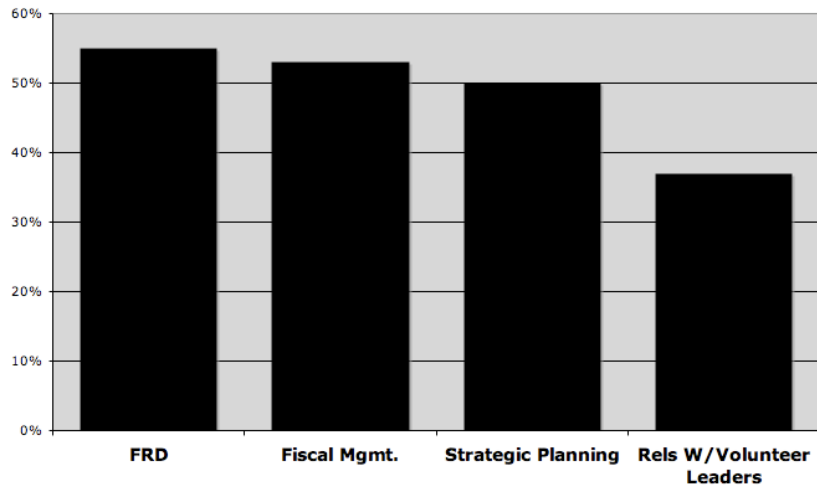
Other professionals feel that their functional roles limit their potential for greater visibility. Planning professionals said that their work gives them less exposure to lay leadership. As one senior planner said, “*If you’re a woman and you’re a planner, you’re doubly marginal.*” The same is true for professionals whose departments are considered background supports -- Human Resources, Information Technology and, in some federations, the Marketing Department. These women say that their functions “*behind the scenes*” give them fewer opportunities to showcase their talents and skills.

C. CAREER ADVANCEMENT: IDENTIFIED AREAS FOR RESOURCES AND SUPPORT

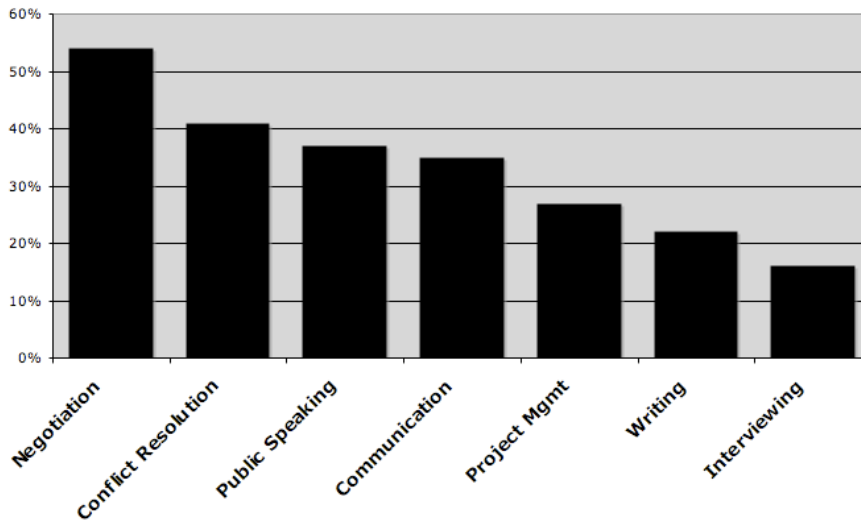
The next set of findings presents, from the perspective of these women professionals, what they will need to achieve their career goals.

Our interview protocol offered a three-part career development “menu” with three categories: **Areas of Expertise, Discrete Skill Sets,** and **Professional Development Supports**. We invited the respondents to select the training and resources that would improve their own career development. The graphs that follow display the respondents’ top rated offerings relative to each other.

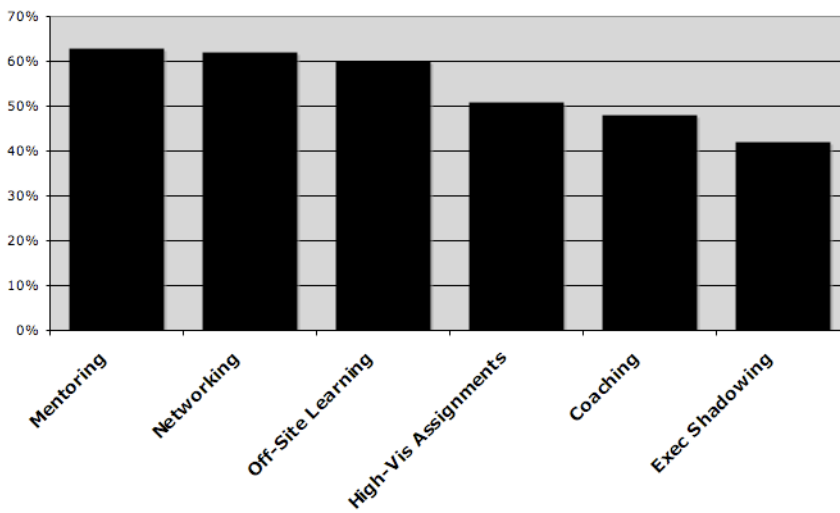
Targeted Areas for Greater Expertise



Targeted Areas for Improvement



Targeted Professional Supports



Overview

The findings yielded important information about what these women see as their top development needs (both in terms of areas of expertise and particular skill sets) as well as their preferences regarding different types of learning methods.

1) Priority Development Needs:

As the charts demonstrate, the majority of these professionals identified **fundraising, fiscal management and strategic planning** as areas in which they would like to develop greater expertise. They also identified **negotiations** as a particularly important skill. **Conflict resolution** and **public speaking** were also identified as essential by some of the respondents. Finally, **writing skills and project management** were requested as well, though by fewer women.

2) Priority Learning Methods: Mentoring, Networking and Off-Site Learning

The findings also indicated preferences regarding learning methods. **Mentoring, networking and off-site learning opportunities** were cited as primary needs throughout the interviews. This finding held true across every professional level and across federation size and location. Many women also spoke of the need for **high-visibility assignments** to spotlight their professional skills and expertise. This mirrors the findings described earlier, in which the respondents identified factors that had contributed to their professional growth to date. **On-the-job coaching** was also cited as a priority area of need, particularly to tackle the more strategic career issues.

Many women in this interview sample spoke of the potential benefits of establishing a **mentoring program** in the federation system. No consensus emerged about the definition of a mentor; the possible functions ranged from a friendly sounding board and source of informal advice to a higher-ranking professional or lay leader who might provide strategic counsel for career advancement. Many women named **professional colleagues** and **lay partners** who act as informal advisors and offer “*camaraderie and a sharing of ideas.*” While not everyone characterized this as mentoring, these “*kindred spirits*” were held in very high regard.

While many women credited their **supervisors** with good mentoring, the complex dynamics of these relationships tends to limit career guidance. On the other hand, several professionals spoke of their **CEOs** as important mentors. One senior manager said of her Executive, “*He is a mentor and role model for me. I have grown as a supervisor as I watch him supervise me.*”

Several women described their “**board of directors**” approach to mentoring, in which they call upon selected mentors, both men and women, for specific kinds of wisdom or guidance. These mentors might include current and former federation colleagues, as well

as colleagues outside Jewish communal service. For example, one high-level fundraising professional catalogued, among her mentors, a Campaign Director in another federation who provided advice on her development plan; her Women's Board President who helps her communicate with her Executive; a local attorney who counsels her on interpersonal issues, and a coach who taught her "corporate speak" since her current Executive comes from the corporate world. In this same context, several women named specific UJC staff who have provided fundraising acumen. Here, as in other kinds of mentoring, the professionals underscored the importance of structuring these relationships with appropriate boundaries and expectations.

I go to women volunteers for professional issues and professional women around Jewish issues. Male lay and professional leaders are helpful around issues in the community.

Department director, Cleveland

Some women said that they had no mentors. There was some variance here about the desire for such a relationship. A few women seemed unaware that such relationships might be beneficial.

In terms of possible future mentoring programs, we heard frequent preferences for a system-wide mentoring initiative, with male and female mentors at higher levels. This common refrain speaks to the value of accessing the expertise and collegial support that already exists within the system. One high-level professional noted that it may be wise in such programs to avoid a *formal* matching system. "*People have to learn how to cultivate relationships so that they can develop their own mentoring relationships. Assigning mentors is not the same experience.*"

A few professionals spoke about what may be regarded as successful **peer mentoring programs**, including programs in Montreal and Los Angeles, both carefully structured. A Baltimore peer mentoring group brought women professionals together for dinner discussions around issues of career advancement and work-life balance. These women crafted individual career plans and were matched with a formal mentor from the Baltimore nonprofit community. In another community, a group of women professionals, including those in federations and other Jewish communal agencies, meet quarterly in a place where they are unlikely to see their colleagues or friends, to talk frankly about their challenges and to offer advice to each other.

As a coda to this set of findings, it is worth mentioning that nearly half of the women asked for **on-the-job coaching** to support career advancement. This finding aligns with our experience as interviewers. Many women said that the interview conversation had stimulated their thinking about career development in new ways.

Most of these women also spoke of the need for **networking** – nationally and regionally, to meet with their professional counterparts, to cultivate contacts, and to achieve greater visibility in the system. The desire for **off-site learning opportunities** was linked to networking, as a meaningful way of meeting with other professionals away from the

home federation. This included opportunities to attend conferences both within and outside the Jewish communal network, devoted to nonprofit management, fundraising and leadership development.

Newer professionals, especially from intermediate and small federations, said they would benefit from participating in **missions** and the **GA**. At higher professional levels, several women speculated about whether an MBA would improve their career advancement. The most frequent request was for a “**junior-level**” **Executive Development Program**, with an integrated approach to the developmental needs of middle managers. As a program manager in New York City said, “*We do a good job of executive level development and early career development, but not a good job in the middle.*”

D. CAREER CONSTRAINTS AND OBSTACLES

The next set of findings presents the constraints and obstacles – local, system-wide and personal – that stand in the way of career advancement, according to these interviews. Most of the respondents named at least one of the following obstacles: **lack of career pathways and planning, limited job openings at the highest levels, relocation, work-life challenges, gender bias and compensation.**

1) Career Planning and Pathways – Uncharted or Overly Rigid

There needs to be a better system of career ladders. There is a sink-or-swim approach to promotions. My path has been purely accidental rather than conscious, strategic decisions. UJC should identify talent throughout the system for training and career tracking. It has to be more systematic and less happenstance.

Senior manager, large federation

Nearly everyone stated the need for **career planning**. Most of the women said they have no sense of the system by which talent is developed or how people are trained to assume leadership roles. A typical comment, expressed by a mid-level professional in Atlanta, was, “*The process seems very random; it’s hard to see or know how people move up or why they move out.*”

Linked to career development is the issue of **career pathways**, within single federations and throughout the system. More than two-thirds of the respondents identified the lack of career pathways as a major barrier to advancement. A large-federation Campaign Director said in this regard, “*We need a better sense of what the clear definition of skills is for each position and an understanding of what it takes to get to the next level.*”

We also heard about **rigid career pathways**, of professionals being limited to fundraising or programming. As one high-level fundraising professional said, “*The programming people are primarily young social workers whereas the fundraisers are*

mostly aggressive and have competitive goals. For people to grow, there have to be more career paths and more cross-functional teams.”

I would benefit from job rotation and learning from other departments and at affiliate agencies, as well as working more with lay leaders. There should be more people coming into Jewish life from outside, who can bring skills and experiences from other sectors. There should be a system of “leaves” where you can try other things and bring that learning back to federation.

Senior planner, large federation

In a similar vein, many women spoke of promotions as the addition of responsibilities without contextualizing new positions in a comprehensive career plan. A senior manager observed, *“There is a phenomenon that the job is growing because we are competent to handle more and more, without any thought – on our part or theirs – about how this fits with our career growth.”*

Women with prior careers in the private sector were particularly aware of the lack of systematic career planning. A former real estate executive commented, *“There is a very clear bias, based on paying your dues within the system, regardless of the professional experience you’ve had elsewhere. There is no valuation of skills from the private sector or other sectors.”*

Another professional, formerly in corporate finance, said, *“We need to think creatively about how to tackle this issue. My bank was a huge organization, but they were very conscious about advancing women. Upper management spotted people who they wanted to move ahead and intentionally moved them ahead. They made an effort to help the women move forward – it was very intentional.”*

2) Limited Job Openings at Highest Levels

Many respondents referred to the limited number of senior-level jobs within their own federations and throughout the system. At several large and large-intermediate federations, professionals remarked on what one woman called *“narrow options at the top in a hierarchical system.”* These women observed that their Executives are not likely to retire in the foreseeable future; some Executives’ tenures ranged from 24 to 35 years.

The effect of these static conditions is that professionals reach a certain level of managerial responsibility and then have nowhere to go. Several women said that they circumvented this stasis by “inventing” new jobs for themselves. One professional described her strategy as a “diagonal” course that crossed functions and departments, rather than through the traditional “vertical” hierarchy.

Younger women expressed frustration with what they viewed as the slow pace of career advancement. Several junior-level professionals in Miami and Washington remarked on **high staff turnover**. Their sense is that they must wait too long before being considered

as eligible candidates for higher-level positions. At one large federation, a middle-level professional said that she felt valued by her supervisor and lay leadership, as well as by her chief executive. *“My supervisor has asked for a new title for me. But the [CEO] is resisting giving me a Director title. He said, ‘She has a long future in this organization. I don’t want her to peak too soon.’”*

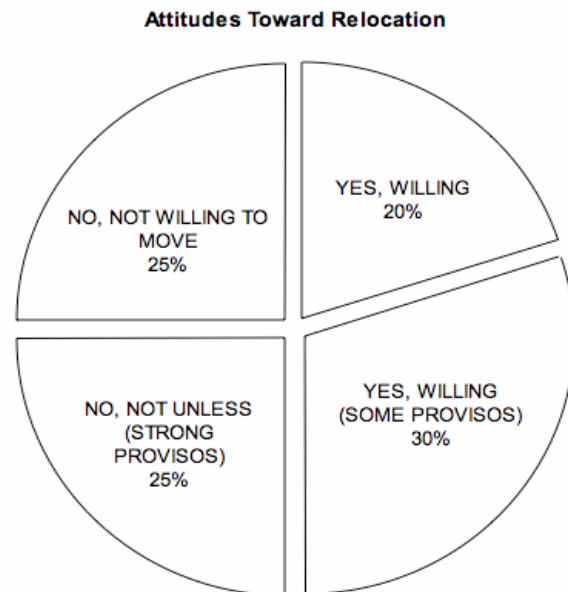
3) Relocation

The challenge of relocation for women federation professionals has been well-documented, both in the 2003 AWP-UJC research report on gender bias in the federation system and in the recent UJC report, *Gender and the Executive Search Process* (2007), by Jessica Bell.

Bell notes that relocation is a *“common obstacle for women and for search committees looking to expand their executive search options.”* Anecdotal reports from UJC and federation search committees have documented the difficult choices that some women have faced around relocation and why some candidates have removed themselves from search processes. The reasons include the difficulty of securing employment for the spouse, inadequate compensation packages, and issues around children and education.

Given these anecdotal reports and prevailing assumptions about women and relocation, we asked our respondents, *“If you were offered the opportunity to achieve your professional goals in another community in 3-5 years, would you be willing and able to move? What kinds of relocation can you consider? What might be the obstacles?”*

As this graph demonstrates, 20% of the women in this self-selected sample are willing to relocate for professional advancement, without provisos. This group includes young single women, married women with children whose husbands have flexible employment, and older women, married and single, without children at home.



An additional 30% are willing to consider relocation, with some provisos. The significant variables are timing and location. Women with children said that they would consider relocation at particular transitional moments; for example, between elementary and middle school, or after high school graduation. In terms of location, some women would consider the “size and strength” of the proposed Jewish federation community (for example, the presence of Jewish day schools). More often, the women professionals in

this sample expressed their preference for working in a federation community of comparable size. Spousal and partner considerations also play a role. Two women with female partners said they would need to consider whether the proposed community would welcome them. Orthodox women expressed preference for a community open to observant Jews.

For 25% of these women professionals, relocation is an option, but only under the most favorable conditions. The significant variables were salary and position. As one woman said, *“It would have to be a really sweet opportunity.”* Most of the professionals in this group are deeply rooted in their communities, through immediate and extended families; many said that the participation of their parents and in-laws made it possible for them to pursue careers, and they could not manage without this support. These concerns notwithstanding, even this sub-group recognized that relocation may be the critical lever to advance them toward their leadership goals.

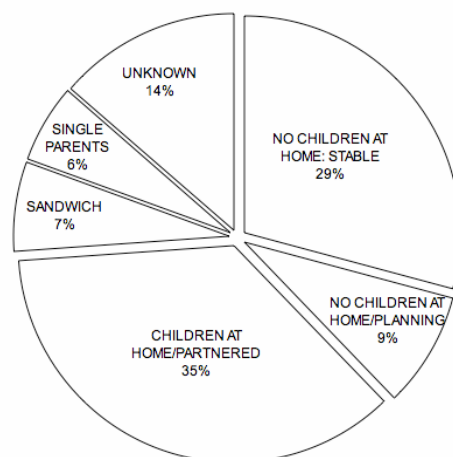
Finally, 25% of these professionals are not willing to move. These women are deeply attached to their current federations and communities, with family ties going back several generations. In most cases, their spouses own local businesses or are professionals in less portable careers.

4) Work-Life Challenges and Career Advancement

The subjects of work-life challenge and workplace flexibility surfaced repeatedly in the interviews. To explore these issues, we asked, *“In what ways have issues of work-life balance influenced your career choices or professional advancement, if at all?”*

Prior research inside and outside the Jewish communal sector has demonstrated the profound impact that workplace flexibility has on women’s career advancement, given the fact (widely documented) that women continue to shoulder two-thirds of family and care-giving responsibilities. It follows that the absence of institutional flexibility disproportionately affects women, thereby establishing a significant gender based obstacle. Nonetheless, we believe that this issue will increasingly affect all professionals – men and women.

(Note: In this chart, the largest proportion of respondents described themselves as married or partnered with children, followed by women who do not have children living at home, at all stages of the life cycle. Smaller groups represent those women planning to have children in the next 1-5 years; women caring for both children and aging parents, and single mothers. Finally, the interview protocol did not ask specifically about family status and some respondents did not volunteer this information.)



Our discussions surfaced four distinct work-life issues that affect women federation professionals: the confusion between **ad hoc vs. institutional flexibility**, the lack of **parental leave policy**; the problem of “**the mommy track**” at federations, and the conflict between **personal and professional choices**. The section concludes by featuring several **forward-thinking federations** which were praised for their sincere efforts to use workplace flexibility as a tool for women’s career advancement.

a) Ad hoc vs. institutional flexibility: When discussing organizational flexibility, about half the federations received positive appraisals, and about half were considered rather inflexible. Some federation cultures were praised as “caring environments” and for making intentional efforts to offer flexibility. Other federations were characterized as highly rigid. The broad consensus was that most workplace flexibility depends on individual supervisors.

Given the lack of formal policies, flexibility can vary widely, even within the same federation. For example, one large federation appeared to exhibit the best and the worst approaches to work-life balance, depending on supervisors:

There is terrible work-life balance here, and there are no role models for a healthy balance.

The flexibility has been wonderful. Working here, I can really put family first.

They need my skills and expertise, so they accommodate me. But not everyone has that flexibility.

My work-balance has always tipped more toward work than life. I am not a good role model. My kids once called and said, ‘Do you care about hungry Jews? There are three hungry Jews five miles away at the dinner table.’ I don’t know if I had to be this way to get ahead or if I have just always been this way.

While many women praised the flexibility of their federations on an informal basis, they were extremely cautious about revealing their individual arrangements. A typical example is the woman who spoke highly of her family-friendly supervisor, “[If I have to leave], he knows I’ll make it up.” She then paused and said she didn’t know the formal policies of her federation and asked that her name be kept confidential.

Issues around work-life balance also affect single women. Several commented on their federation’s expectation that single women will work evenings and weekends. Typical of this group was the young woman who said, “I am single and because of that, the professionals and volunteers believe that I can work constantly and that I’m always available.”

b) Parental leave: The lack of parental leave policies is a common focus of frustration among these professionals. One woman said of her large federation, which is otherwise encouraging of women's career advancement, *"Maternity leave here is very minimal. We don't even have a short-term disability plan for maternity. It speaks to the overall big picture of whether or not we are living our values and it does not bode well. It leaves a bad taste in my mouth."*

Another professional reflected on what happened when she told her CEO and Board President that she was pregnant. There was no maternity policy in place since no woman of childbearing age had worked in that small federation in more than twenty years. This professional was encouraged to research policies at other similar-size federations, but she discovered that no federations of that size had maternity policies in place. She finally negotiated an arrangement with her Executive, but was told to keep this arrangement confidential, so that this federation would not be seen as setting a precedent.

"Federations profess to be family-oriented and sensitive to Jewish continuity, but this is not reflected in maternity policies which are limited to vacation time and no flexibility when you come back. I continued to work while I was on maternity leave even though I was unpaid."

Fundraising professional, large federation

c) The "mommy track": When discussing work-life choices and challenges, many women credited their federations with informal flexibility. In fact, several of these professionals said that they sought federation employment because of the "family-friendly environments" that are responsive to Shabbos and Jewish holidays.

However, many women professionals spoke of being relegated to the "mommy track" once they have children. The "mommy track" seems to revolve around two linked factors – **limited availability of part-time options** and **attitudes** toward working mothers.

In some federations, the negative attitude toward **part-time work** becomes an effective barrier against career advancement. A campaign professional in a small federation who otherwise says she has *"the best job in the world,"* said that she adjusted her schedule to the changing needs of her family. *"I had to cut down from 40-60 hours down to 30 hours each week. Cutting my hours caused me problems here. They want me here all the time."*

Several federations offer part-time options but effectively penalize the women who choose them. A senior management professional said of her 85% schedule: *"It's a major barrier. We have a lot of women working flexible schedules, but I'm the most senior. It seems impossible to advance into senior positions without being on a full-time schedule. Maybe there's the thought that we have to be available to our volunteers 24/7. I don't think that's a valid assumption in this day and age."* This woman's colleague characterized their federation as *"a good place to work as a parent but not to advance."*

I don't know what the future holds. I have submitted a proposal for working part-time. Because we now have our first person working part-time, I am optimistic. Everyone else left after having a baby.

Young professional, Miami

A few federations are only now experimenting with part-time options that keep women on the career trajectory. Women professionals in New York City and Detroit spoke of new approaches to part-time employment. One of these professionals said of her success in staying on track, *"They said nobody ever comes back after they have babies. They can't say that anymore; some of us have made it work. If the federation can be flexible, they are better off for it."*

When considering **attitudes** toward working mothers, many women reported that their supervisors and CEOs assume that they are no longer interested in career advancement. A senior fundraising professional at a large federation said, *"I have a stay-at-home spouse, but other people assume that I won't take on certain projects because I have young kids. So certain opportunities might not be offered to me."*

Similarly, a senior manager in another large federation recalled, *"When I came back from maternity leave, full-time, I was switched to a lateral, lower position without my input. It took years to get my position back."* A mid-level professional at UJC commented, *"Once you have a child, they think that this puts a limit on what you can do. While that is indeed true, I would be willing to arrange my personal life to realize certain opportunities. I want my boss to ask me, and I will arrange my priorities as I see fit. He has good intentions, but I want to make these decisions for myself."*

Conflicting attitudes are not limited to male professional supervisors. Several full-time working mothers, with long tenure in the system, are wrestling with this issue. As one woman said of managing varying choices in her department, *"The opt-out issue makes me uncomfortable. I don't have time to keep stay-at-home mothers in the loop. Around here you have to be one of the guys. And coming in three days a week does limit career possibilities."*

Another woman supervisor took a more positive approach: *"I have one woman who is coming back three days a week. This is the first time that I am trying this because I don't want to lose her talent and commitment. I don't want her to stop succeeding professionally because she is having a baby. I am trying to make it work."*

d) Forward-thinking federations: Several federations were praised for making progress around workplace flexibility and encouraging working mothers to pursue career advancement. Baltimore was described as a "shining star," in terms of flexibility; several women spoke of alternative schedules and a family-friendly environment. One high-level professional said, *"This federation has offered me a great opportunity for work-life balance and achievement. I love my job and I can take care of my family. I am a working mom, and my career is important to me. In Baltimore, we are not made to choose."*

Cleveland was also cited as a federation that supports life-work balance over the long term. As one woman said, *“This federation is wonderfully supportive of work-life balance even if it gets crazy during Campaign. Although I work full-time with two small children, this federation has at least thirty percent women working part-time at the executive level.”* Another high-level professional said of her CEO, *“When I got pregnant, Steve Hoffman asked, ‘Tell me what you need. How can we make this work?’ A lot of people here work part-time, and we try to keep people as consultants even if they aren’t working here part-time. Why? Because we need the staff.”* Toronto, New York City and UJC were also cited for being responsive to the realities of dual-career families.

e) Professional vs. personal choices: When discussing work-life issues, these professionals reflected on their own choices and conflicts. They voiced their desire to pursue fulfilling careers on behalf of their federations and Jewish community while maintaining healthy family and personal lives.

My determination is to have work-life balance and not work until 10:00 pm every night. This might limit my advancement although other people have seen that I’m quite effective when I’m around, so it hasn’t had a tremendously negative impact.

Fundraising professional, Toronto

Most respondents were realistic about the fact that, at different times and in different chapters of their lives, it would be more or less difficult to integrate their personal and professional lives. Many women were quick to reference the presence (or absence) of husbands with flexible careers, helpful parents and in-laws and the ease (or difficulty) of securing good childcare, as factors which make their careers more (or less) possible.

Even with the best organizational circumstances, professionals will continue to wrestle with these conflicts. As a department director at a large federation acknowledged, *“I am starting a family and I am at a senior level. My CEO made it possible for me to stay after the birth of my first child. I work at home one day per week. While work-life issues have not held her back, she said, “The job does take a personal toll. Where I am in my life does not match my career. I have to make different choices now. I can’t take a huge growth opportunity right now because of my personal life.”*

These discussions surfaced the central paradox of federation life, respective to work-life issues. On the one hand, federations are committed to Jewish values, Jewish continuity, and Jewish family. On the other hand, federations expect their professionals to work 24/7 (or 24/6). The women professionals that we interviewed are wrestling with these mixed messages and with their own high expectations – to pursue excellence on behalf of their Jewish community while building family lives rich in Jewish values. These women are willing to take responsibility for their family choices; however, many of them identified the gap between the espoused values of their federations and their organizational norms. They are gauging to what degree their federations will support work-life choices while also supporting the extended trajectory of their careers.

5) Gender Bias

Numerous research studies have documented gender bias in the federation system and throughout the broader Jewish communal sector. For the purposes of this study, which sought to focus on what would support women in their career goals, we did not include specific questions about gender bias. Nonetheless, 20 women in the sample of 130 respondents cited examples of gender bias in the system. These comments usually surfaced at the end of the interview, when we asked respondents to speak about any issues which had not been raised thus far. These professionals identified three primary indices of gender bias – the **salary gap, fast-tracking of male professionals** and the **executive search process**.

a) The salary gap is a source of bitter frustration for women professionals who have experienced it firsthand. A senior fundraising professional, with decades of experience in the system, spoke about meeting with her CEO to discuss compensation, noting that her salary and benefits were significantly less than her male counterpart. *“My CEO said, ‘Come on. You know you would do this for free.’”*

Another senior-level woman professional discovered that a recent male hire, in a comparable position and presenting less experience, was offered \$60,000 more in salary. When she confronted her CEO, he offered a 3% raise. She then approached her Board President who declined to get involved, sending her back to her CEO and HR Director. After six months of persistent negotiations, she accepted a raise that was still \$20,000 lower than that of her male colleague. Reflecting on the process and her incomplete victory, this woman spoke of the experience’s profound personal and professional toll.

On the surface, it may seem that the salary gender gap is of minor concern; after all, only 15% of the respondents raised the issue independently. However, 55% of this same group asked for training in negotiation skills, noting their discomfort around issues of salary and promotions. As one young woman said, *“When I got this job, I didn’t negotiate for my salary at all. I took what they gave me. That was naivete, but it may also have been gender. But that salary is the amount on which all my future raises will be based. I wonder if a male would have handled this differently.”*

b) The “fast-tracking” of male professionals in the system was raised by several younger women who are noticing, as one professional said, *“Men move much quicker and at much higher salary levels.”* A senior development associate with many years of lay leader experience, observed, *“It is obvious that the Jewish communal field is dominated by women at the entry level but that it is overwhelmingly male at the top levels, so there must be a different way that women and men are tracked for advancement.”*

“At the entry level, a man’s resume gets much more attention because there are so few men... Once they are here, they are promoted faster. They are more visible and given special attention because they are a rarity. They don’t have to work their way up like us. They just jump right in. What is this about besides sexism?”

Mid-level professional, large federation

One woman, who rose rather quickly in her large federation, said that she had previously dismissed the idea of a gender problem. *“I had a fabulous relationship with my supervisor, a woman, who was very good at acknowledging me. Now I don’t work for a woman, and I no longer get recognition. I do think that has to do with gender. Before, I didn’t understand the problems [of my female colleagues] because I had none of those issues. Now I understand.”*

A successful senior fundraiser said of her large federation, *“I have experienced the women’s problem. My ideas do not get credited at meetings. Even at my level, I am not valued as a speaker for lay people. I am respected by individual volunteer leaders. But there is a problem about how women are viewed in the federation system. There is still that sense: ‘You’re a girl. What do you know?’”* On the most practical level, she spoke about the fact that there is a layer of supervision between her position and the Exec. *“If I were a man, I would be co-equal with my current boss.”*

Some professionals at UJC raise similar issues. One woman said, *“I don’t feel there’s a glass ceiling here for me, but I do see a glass ceiling for my boss and her ability to enter the executive room. And that lack of empowerment trickles down to me.”* Another high-level professional said, *“After one more step – that I feel I can make easily – I will hit the glass ceiling. Now that I am higher up, I can see the gender bias.”*

c) The executive search process was raised by a few senior-level women who had experienced gender bias firsthand, before, during and after interviews with search committees. In one case, a woman reported being prepared poorly for her CEO candidacy: *“Before the interview, I was told, ‘Don’t act too much like a woman, but don’t act too much like a man.’”*

Another senior-level professional said of her interview for an executive position, *“The questions asked by the search committee were incredibly rude. They asked, ‘What if a major donor asked you to do something when your children wanted you to be somewhere else?’ They would never ask this sort of question to a man.”*

In the absence of policy-based gender equity, women professionals appear to need strong advocates to support their candidacy. A female Executive of a small federation attributed her success to the championship of the Search Chair, an 82-year-old businessman who took it upon himself to persuade the committee of her value, despite their unabashed skepticism: *“Why would we want to hire a woman?”*

While younger professionals may be many years away from presenting themselves as CEO candidates, they raised questions about the imbalance in federation leadership, given the preponderance of senior-level women professionals. Some of these women noted that their senior managers are all women, but that their CEO is a man.

We have more women on the upper rungs in our federation, and fewer men in the organization overall. But when they were looking for a new Exec, it seems that there were no women candidates considered for the position.

High-level professional, large federation

6) Compensation

Although our interview did not ask about salaries specifically, approximately 12% of our respondents voiced their belief that federation salaries do not compare with market levels, even within the secular nonprofit sector. As one woman said, *“Federation seems like a second-salary kind of job.”* Some younger women who admitted feeling unsure about their career goals said it was because they cannot afford to stay in the federation system given current salary levels.

“The financial piece is an issue. When you finish grad school, you need a salary to pay back your loans. Maybe I will stay in Jewish communal service, maybe I will not. I will get to the stage where I won’t be content to break even. That’s part of the reason for high turnover. People have left for family foundations, for political organizations, for other social service and Jewish agencies where they will get more status and more money.”

Some professionals said that compensation issues were forcing them to reconsider their professional choices. While most of these women want to remain in Jewish communal service, their own family situation – as equal breadwinners or single parents – compelled them to explore other options.

IV. RECOMMENDATIONS

UJC commissioned AWP to conduct this study, both to collect information from women professionals in the federation system and to generate recommendations for possible interventions for women's career advancement, based on the study findings.

AWP's recommendations encompass *three* broad areas:

- **Public support for women's career aspirations**
- **Sequenced career planning and professional development**
- **Workplace flexibility over the career trajectory**

These recommendations derive from the key findings as presented in this report, relating to the career aspirations of women federation professionals; the learning and career opportunities they seek; the systemic obstacles they encounter, and the environmental conditions which would support their goals and help propel them forward.

We have designed these recommendations as practical guidelines, pilot projects, policy experiments and task forces. Some of these recommendations may be appropriate for UJC to seed as modest initiatives at selected federations, to be cultivated locally thereafter. For some recommendations, UJC might serve as a central resource, to provide guidance around workforce cultivation and leadership development for women professionals.

RECOMMENDATION #1: PUBLIC SUPPORT FOR WOMEN'S CAREER ASPIRATIONS

a) Publish this report and disseminate widely throughout the federation system.

By making this report available, in print and on its website, UJC will send a clear message to federation professionals and lay leaders about the organization's commitment to improving gender equity at the highest levels of leadership and eliminating systemic barriers that currently limit women's access to these positions.

Moreover, by widely disseminating this report, UJC will hold up a mirror to all women federation professionals – raising their awareness about common aspirations and challenges. Although this report reflects the responses of a self-selected group, it is likely that hearing these voices will serve as a positive impetus for many women professionals in the communal sector, to stimulate their thinking about what strategies and skills they will need to succeed.

b) Bring this report to all committee discussions and planned initiatives concerning career planning and leadership development within the system.

The findings and recommendations of this report can enrich ongoing discussions about career planning and leadership development, i.e., national retreats of large-city federation executives, convenings of senior managers and human resource professionals, and committee meetings of lay leaders dedicated to workforce development. These findings might amplify what is being learned from the current Mandel EDP as well as other UJC career and leadership development initiatives. This report also can contribute to discussions on the federation level about local workforce development.

RECOMMENDATION #2:

REINFORCE GENDER PARITY IN LEADERSHIP DEVELOPMENT

a) UJC might develop a “Junior” Mandel Development Program, targeted to 24 federation professionals in the “middle ranks.”

Many women professionals expressed the need for a “junior” Mandel EDP, an intensive program that would fulfill the training needs of middle-level professionals while offering the collegial benefits that have been made available to the current cohort of Mandel EDP participants. Candidacy for this program would include women whose professional job ranks fell short of eligibility for the current iteration of EDP.

UJC’s commitment to recruiting 50% women for the Mandel EDP candidate pool was hailed as an important precedent. In designing the selection process for this new program, we recommend that UJC also commit to a recruitment goal of 50%.

By developing a junior-level EDP and ensuring a 50% recruitment goal for women, UJC will fulfill three objectives: 1) the selection process will serve as a “talent scout” for future leadership talent among the 70% women who staff the federation system; 2) the “junior-level” training program will strengthen the “pipeline” with well-trained women professionals, and 3) the program will serve as a retention mechanism, to cultivate women professionals in the middle ranks and reduce attrition by those who have been frustrated by the slow pace of career advancement.

b) Selected federations might collaborate on a career planning pilot project, for a total of 20 high-potential women professionals.

UJC, in collaboration with 3-4 federations, might consider piloting a career planning initiative for high potential women. The goal of this program would be twofold: to maximize the career development of talented women professionals who aspire to leadership positions and to balance what has been reported as the “fast-tracking” of male federation professionals.

The proposed program might be sequenced as follows:

- (1) Select 3-4 federations to participate in the career planning initiative. UJC might consider working with one federation in each size category and choosing at least one federation which displays readiness to work on these issues. (For example, Cleveland or another federation participating in “Great Places to Work.”)
- (2) Ask each federation to develop a system for choosing high-potential women professionals (proportionate to federation size). Develop criteria for selecting high-potential women at various professional levels, with guidelines to prevent gender bias based on family status.
- (3) Develop short-term and long-term career plans with this group of high-potential women, using the findings of this report as a template for understanding existing opportunities and future needs, from the perspective of the women themselves.
- (4) Bring this group of high-potential women into a diagnostic process – for example, a 360-degree feedback – to catalogue and analyze their strengths and developmental needs. The benefit of 360-degree feedback is that it enables participants to gauge the gaps between self-assessment and others’ perceptions.
- (5) Engage these high-potential women in individual career planning, delineating what steps they will take over the next few years, to reach their short-term goals and prepare them for longer-range aspirations. These steps might include the kind of “special projects” that were cited by respondents as key growth opportunities, including “stretch” and high-visibility assignments, cross-functional rotations, off-site learning and networking. These plans would be developed in collaboration with supervisors and senior management.
- (6) Provide support services to this cohort, including mentors within the federation system and external coaches. An internal mentor (or several, in a “board of directors” model) can provide guidance specific to federations, including local community politics and lay-professional relationships. A professional coach can help these high-potential women develop greater awareness about how to leverage their skills, identify key advocates, and increase their visibility.
- (7) Showcase these women at national and regional events, to increase their visibility among influential executives and lay leaders and to expand their network of contacts throughout the system.

This targeted career planning project, as sketched above, would be built on principles and practices that have proven successful in the corporate and academic sectors, including the DeLoitte & Touche *Women’s Initiative* (which has been documented widely) and the Office of Women in Higher Education (OWHE) as summarized in the UJC report, *Gender and the Federation Executive Search Process* (2007).

c) Map the federation system for projected vacancies at the executive and senior leadership levels, over the next 3-7 years.

Any serious leadership development initiative must be linked to a “mapping” of potential leadership positions in the federation system. This kind of system mapping and timeline will send an important message to the federations about the vital link between succession planning and career planning. UJC has already taken steps in this direction through its “tracking” of the current executive search process, including a catalogue of referral sources and analysis of search committees. The next step is to anticipate future openings and prepare high potential women as viable candidates for these search processes.

UJC might take its cue from our American political system, in which future Congressional openings are monitored regularly, as part of each party’s strategy for strengthening and renewing leadership. Similarly, UJC might take advantage of its unique national perspective to map the federation system and project leadership shifts at the executive and senior management levels through retirements, promotions, and relocations. This “political” data can be used as a tool in the “matching process” – to alert qualified women professionals, i.e., participants in UJC’s leadership training programs, of possible openings, well in advance, in order to help them plan for the future.

d) Develop a UJC “mentor bank” to connect federation mentors with federation professionals.

Our interviews revealed a remarkable appetite for mentoring. Dozens of women asked for a system-wide mentoring initiative. Many women volunteered themselves as mentors for other professionals in the system. We also collected many names of federation professionals and lay leaders who were identified by their colleagues as helpful advisors and mentors. There appears to be abundant talent for launching a mentoring initiative.

Research in the private and academic sectors suggests that, in addition to its professional benefit to the “mentee,” mentoring also enriches the mentor. These benefits include a revived sense of professional mastery, renewed organizational commitment, and varied learning experiences for both partners.

UJC might begin by creating a centralized “mentor bank.” The first step would be to create a database of federation professionals who have already served as informal or formal mentors and/or who have expressed interest in becoming mentors. The second step would be to assess candidates who have volunteered themselves as mentors. Simultaneously, guidelines would be developed around goals, structures, and expected outcomes. The third step would be to establish a UJC mechanism, through a telephone “hotline” or internet link, to connect potential mentors and women professionals who seek these partnerships. The fourth step would be to publicize the availability of this resource to federation professionals. It is important to note that this initiative would not necessarily entail a formal matching component, but rather would allow women

professionals to identify the possible mentors that suit their individual needs. Ultimately, this program's success will depend on the kind of relationship which is established by each mentoring pair.

e) Invest in “conference scholarships” for the GA, missions and other conferences, to increase participation by a diverse range of women professionals.

Women professionals, especially those at the junior and middle levels, cited attendance at national convenings as particularly meaningful, to increase their understanding of federation-specific issues. Several women from small and intermediate-size communities spoke of their federations' limited resources for local professional development and for UJC offerings. Professionals outside the fundraising track spoke of conferences as a critical venue for “cross-functional” learning. Attendance at national conferences builds federation commitment, develops fluency about the system and builds informal mentoring and collegial networks.

UJC can support more diverse participation of women professionals in these gatherings, both within the federation system and elsewhere in the Jewish communal sector, by creating a “conference scholarship bank” to cover travel and conference expenses. The “scholarship” can be linked to networking and/or mentoring initiatives, by pairing “scholars” with more experienced federation professionals at these various convenings.

**RECOMMENDATION #3:
SUPPORT WORKPLACE FLEXIBILITY AND CAREER ASPIRATIONS.**

a) Create a UJC Task Force on Workplace Flexibility to explore what would make federations *great places to work* and *great places to advance*.

While many women professionals in this sample noted the informal flexibility offered by their supervisors, the majority of respondents characterized their federations as “*good places to work as a parent but not to advance*.” A few federations were praised for their intentional efforts to retain and advance talented women professionals through part-time options, consulting positions and a creative approach to life-cycle issues.

The mandate of this UJC Task Force would be to launch an effort which would then be carried out by federations on the local level. The Task Force would address the work-life issues that might help federations become *great places to work* and *great places to advance*, for both women and men, at different stages of the life cycle; this would include, but not be limited to, parenting choices. Younger federation professionals of both genders are seeking greater work-life balance. By creating this Task Force, UJC can demonstrate that work-life issues are receiving priority status.

This UJC Task Force would bring together senior executives and lay leaders from federations and from the broader Jewish communal sector, to explore policy recommendations for workplace flexibility system-wide. Several federations might serve as lead players to demonstrate how workplace flexibility enhances recruitment, retention and career advancement. Senior-level professionals from JBFCS, JESNA and the Educational Alliance might serve as Jewish communal “advisors” to this effort, offering practical experience and insights about how other complex bureaucracies have managed the challenges of workplace flexibility. AWP would be willing to share its knowledge and expertise about how workplace flexibility can be used as a catalyst for reviewing and improving workplace performance.

b) Distribute survey to all federations, to catalogue current institutional policies and *ad hoc* behaviors around work-life issues.

More often than not, workplace flexibility at federations is managed by *ad hoc* attitudes and decisions rather than formal, explicit institutional policy. Some federations, including a few large federations, were cited for having no parental leave policy. In other federations, women admitted that they did not know their federation’s policy around various work-life issues.

The federation system presents a wide range of policies and attitudes regarding workplace flexibility. Assembling a common fact base is the first step in creating a more enlightened and transparent approach to work-life issues and organizational effectiveness. Where does each federation sit on this continuum, characterized on one end by limited part-time options and no parental leave and on the other end by forward-thinking environments that support professional and personal goals (with every variation in-between)? Armed with this data, UJC can gather best practices, identify “institutional mentors” and encourage cross-federation learning.

**RECOMMENDATION #4:
FOLLOW UP WITH ASPIRING WOMEN PROFESSIONALS**

By commissioning the present study UJC has demonstrated its genuine interest in understanding *what* women professionals want and its organizational commitment to helping them pursue their career goals. To build on this important first step, we recommend that UJC follow up with this group of 130 aspiring women professionals, to explore the ways in which their individual career interests may match emerging opportunities in the system.

Many of the women in this sample responded affirmatively to AWP’s request for their resumes. We will forward these resumes to the Mandel Center recruiting group for follow up. We also recommend that UJC track the career progress of the present sample, to see how the perspectives and career paths of these women evolve over time.

V. CONCLUSION

The findings of this study suggest that there is a positive foundation for advancing women into positions of federation leadership. *First, among this* self-selected sample, there is considerable aspiration to advance to diverse leadership positions in the federation system. *Second*, the interviews showcase Jewish communal professionals whose motivations for career advancement are driven by the desire to make meaningful and outstanding contributions to their communities. *Third*, the findings demonstrate that these women are looking closely at what contributes to, and what detracts from, good professional development and effective career planning. In sum, the perspectives and insights of these women professionals are worth close attention.

The proposed recommendations are targeted to leverage the existing strengths of single federations and the larger system and to address the obstacles that currently hinder women from advancing to higher leadership positions. While modest in scale, these pilot projects, task forces and policy experiments are essential first steps. They will convey a powerful message about the value of women's career aspirations in the federation system. These interventions also will build confidence and momentum among the participating women professionals and their federation partners, which will benefit the overall organizational climate at each federation and throughout the national system.

Most of these women professionals are devoted to their federations and the Jewish community. However, they are also determined to reach their leadership goals. While these professionals would prefer to grow within their federations, their commitment contains a note of caution; a significant number said they would leave their federations if they do not advance within the next 3-5 years. Some women will "migrate" to other organizations in the Jewish communal sector. Others will be lost through attrition, as they take positions in the secular nonprofit or private sectors. We should therefore be mindful that a good number of women with graduate degrees and exceptional career experiences are looking closely at their federations: can these workplaces cultivate talent, support work-life choices over the long term, and provide competitive compensation packages? The answers to these questions may determine the organizational vitality of the federation system in the years to come.

Given the potential for positive change and the risks of inaction, our hope is that UJC and the federation system, by pursuing these recommendations, will choose to support the career aspirations of women federation professionals. UJC can leverage its role to fulfill this mission in three ways. *First*, UJC can help federations become more purposeful around career development and workplace flexibility. *Second*, UJC can develop practical mechanisms to help women professionals gain access to education, coaching, networking and mentors throughout the system. *Third*, UJC can help federations use workplace flexibility to become organizations which support work-life choices and champion the careers of their women professionals.

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APPENDIX # 1:
UJC E-MAIL QUERY TO WOMEN FEDERATION PROFESSIONALS (950)

Dear _____

In 2003, Advancing Women Professional and the Jewish Community (AWP) and the UJC Mandel Center for Leadership Excellence joined together to identify and to address the organizational norms, attitudes and practices that hinder professional women from achieving senior executive positions in Federations. This Gender Equity & Organizational Effectiveness Initiative has taken a multi-pronged approach to addressing these challenges, including:

- creating professional opportunities for women (e.g., EDP);
- collecting data about the gender breakdown of positions held in the system;
- providing opportunities for women in highly visible national venues (e.g., GA)

As part of this work, we are emailing professional women in the federation system. We are seeking to identify those who want to advance to more senior level positions than they currently hold at federation. We would appreciate your response to the following two questions:

- 1) Are you interested in advancing to a more senior level position in federation?
- 2) Would you be willing to discuss your professional aspirations in a follow-up email or phone conversation?

Should you agree to our following up with you, we will reach out to you again by early fall. We appreciate your feedback.

Thank you.

**APPENDIX #2:
AWP INTERVIEW PROTOCOL**

**AWP-UJC
GENDER EQUITY AND ORGANIZATIONAL EFFECTIVENESS PROJECT**

1. I'd like to begin by asking a few questions about your current job and recent career:
 - a) What is your current job title?
 - b) How long have you been at this job?
 - c) What was your job immediately prior to this position?
 - d) How long have you been at this federation?
 - e) How long have you worked in the Jewish communal field?
2. Why did you enter the Jewish communal service field and this federation in particular?
3. As you think about your current job (and/or looking back over your recent career), in what areas have you been growing over the last few years?
4. Have you had any opportunities or experiences that have helped you grow professionally? [If so] Please describe.
5. How well do you feel recognized in your work? In what ways have you been visible to others who might be helpful in your future career?
6. Who, in particular, has been helpful to your advancement or your professional growth, formally or informally? Would you consider this person [any of these people] a mentor? What kinds of help or experiences has this person offered? (*Note: If not named or mentioned, ask: "Was this mentor a man or a woman?"*)
7. In what capacity would you like to be working, let's say, 3-5 years from now? What is your long-term career objective?
8. What do you think will help you advance in your career? What experiences, skills, talents, or contacts do you think will work in your favor?
9. Do you see any major barriers to your advancement? If so, what are they?

10. a) What are the particular areas in which you would like greater expertise?

	Supervisory Experience
	Fiscal Management
	Financial Resource Development
	Creating Better Relationships with Volunteer Leaders
	Strategic Planning

b) What skills in particular would you like to improve?

	Project Management
	Writing Skills
	Public Speaking
	Interviewing
	Negotiation
	Conflict Resolution
	Communication

c) What other experiences would be helpful in advancing your career?

	Networking
	Mentoring
	Executive Shadowing: major donors
	Off-site learning opportunities
	On-the-job coaching
	High-visibility assignments

11. If you were to be offered the opportunity to achieve your professional goals in another community in 3-5 years, would you be willing and able to move? What kinds of relocation can you consider? What might be the obstacles?

12. In what ways have issues of work-life balance influenced your career choices or professional advancement, if at all?

13. If you don't advance within the system in five years, how do you anticipate that you will react? Would you stay in the federation system? Would you continue to work in the Jewish communal field?

14. We are asking for resumes of women professionals who are interested in professional advancement. If you feel comfortable sharing your resume with us, we'd love to have it.

15. Reviewing our conversation, is there anything we left out, or didn't get quite right? Is there anything you'd like to add?

**APPENDIX #3:
RESPONDENTS BY FEDERATION (TOTAL = 130)**

The survey was sent to 950 women professionals employed by federations across North America: Large (435); Large-Intermediate (192); Intermediate (233), and Small (98).

The lists below show the number of women professionals who participated in interviews, by federation size and city.

<u>Large (85)</u>	<u>Large-Intermediate (15)</u>	<u>Intermediate (14)</u>	<u>Small (3)</u>	<u>UJC (13)</u>
Atlanta	Broward County	Greenwich	Central MA	
Baltimore	Central NJ	Harrisburg	Grand Rapids	
Boston	Cincinnati	Jacksonville	Santa Barbara	
Chicago	Colorado	Long Beach		
Cleveland	Dallas	Memphis		
Detroit	East Bay	Monmouth City		
District of Columbia	Houston	New Orleans		
Los Angeles	Kansas City	Richmond		
Miami	Milwaukee	Springfield, MA		
Montreal	Rochester	St. Paul		
New York City	Seattle	Stamford		
Palm Beach Cty	Winnipeg	Toledo		
Philadelphia				
Pittsburgh				
San Francisco				
So. Palm Beach				
St. Louis				
Toronto				

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