



**LEADING EDGE**

Alliance for Excellence in Jewish Leadership

# CEO SUCCESSION

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Case Study of Excellence from  
the Jewish Nonprofit Sector



CASE STUDY

# COMBINED JEWISH PHILANTHROPIES



**Barry Shrage**  
President and CEO  
1987–2018



**Rabbi Marc Baker**  
President and CEO  
2018–Present

**C**ombined Jewish Philanthropies (CJP) is the third-largest Federation in North America. In 2017, it invested over \$64 million in the community and managed an endowment of \$1.76 billion with a staff of nearly 170 full-time employees and 800 volunteers. Excluding universities and hospitals, CJP is the largest nonprofit in the greater Boston area.

On the morning of January 18, 2018, the board of Combined Jewish Philanthropies assembled for what would be one of the most important meetings of its tenure. In fact, it would be a momentous day for the entire American Jewish community. At the time, Barry Shrage, CJP’s then CEO, was preparing to step down after a 31-year tenure at the organization. It was at this meeting that the trustees were to receive an update on the search for his successor.

Per standard protocol, board members expected the update to come from Neil Wallack, the board chair who also served on CJP’s 11-person search committee. They assumed he would present the names of a handful of finalists selected by the committee for the full board to interview. Instead, something dramatic happened. The other members of the search committee shuffled into the room and lined up behind Wallack.

The board must have felt the same sense of awe and appreciation that local Boston fans experienced watching the 2018 Red Sox take the field. This, too, was a team of all-stars: three CEOs of multibillion-dollar companies, two partners at leading private equity firms, the founder of an asset management firm with billions under management, and two emerging leaders in their 30s.

However, instead of presenting a list of finalists, Wallack told the board that the committee wished to put forward a single name—Rabbi Marc Baker—and suggested the board hire him without interviewing

anyone else. Baker was the head of school at the prestigious Gann Academy in a suburb of Boston. He was clearly qualified and known to many of the board members as a high-profile member of the Boston Jewish community. Still, presenting his name alone was a bold recommendation. But it was a unanimous one, the result of one of the largest searches in the history of Jewish organizational life. Over the past year, the committee—and the search consultants who supported it—had screened over 500 candidates, surveyed tens of thousands of stakeholders, and met in person with representatives from dozens of groups and communities in CJP’s ecosystem. It had done so with unusual transparency—regularly fielding phone calls and emails from members of the public, and providing updates on the search on a specially launched website and through presentations to the board.

“We knew it was very unusual to bring non-board members into a board discussion like that, but I wanted the board to understand what a breadth of talent had been involved, and the intense process. I sensed that their personal presence would be key,” Wallack says.

Few organizations in Jewish life can match the scale and scope of CJP’s search—or the pedigree of its search committee. But in assembling a team of all-stars—and then executing a search with precision and professionalism—

CJP’s board provides a model to which all organizations can aspire.

For four days after the search committee’s presentation, Baker met with the board for a series of interviews. Wallack spoke on the phone with each board member, too. When the board reconvened for a formal decision on whether to accept the committee’s recommendation to hire Baker, the vote was taken by roll call. Slowly, as each of the 40 trustees was called and asked to vote on whether to hire Baker, thoughts flashed through Wallack’s mind. With such a high-stakes decision in front of the board, Wallack couldn’t suppress some last-minute nerves.

*Did we assemble the right people to lead the search? Wallack found himself wondering.*

The first reply rang out through the room. “Yes.”

The hair on the back of Wallack’s neck stood up. His mind raced faster as the next name was called.

*Did we stay true throughout the process to the vision laid out in our recent strategic plan? Wallack questioned.*

“Yes.” Another jolt.

*Did we manage to avoid groupthink and make clearheaded decisions as a committee?*

“Yes,” he heard again.

As the roll-call vote unfolded, Wallack's mind unclenched. His doubts slipped away.

"Yes."

He felt a tingling elation course through him.

"Yes."

"Yes."

"Yes."

### **Picking the Search Co-Chairs**

The story of CJP's CEO search begins shortly after Wallack took over as chair of the board in 2014. He and Shrage were eating breakfast together one morning when the long-serving CEO told Wallack of his desire to step down from a leadership role. Shrage wasn't thinking of retirement—indeed, today he serves as a professor at Brandeis University—but he no longer wanted to run a large organization. The decision did not come as a surprise to Wallack, as the board had been discussing Shrage's possible succession for some time. To lay the groundwork for a smooth transition, Shrage was offered a long runway of serving another two to three years.

Wallack and the board favored an external search because there was no obvious successor-in-waiting and because a recent study had revealed significant changes in the community over the past 10 years, including re-urbanization, significant shifts in

denominational affiliation, and a growing diversity of backgrounds, including an increase in interfaith families. While academic research suggests that insider CEOs generally outperform external appointments, the exception is during periods of organizational change. The board decided to cast a wide net and launch an international search to find a CEO capable of leading CJP into the next chapter of its success.

To begin the external search, Wallack and the board had to decide whether to appoint an external search committee. CJP had long run a subcommittee called the organizational development committee, which focused on high-level HR issues, including CEO evaluation and succession planning. This subcommittee was composed of the most recent board chair as well as other former chairs and other highly seasoned volunteers at the organization, and had begun raising the issue of Shrage's potential departure in the years leading up to Wallack's ascension to board chair. But for the same reason it favored an external search, the board decided that a search committee composed of non-board members would be best placed to handle the transition—and to give the Boston Jewish community confidence that the board was forward thinking and responsive to CJP's changing composition and needs.

Identifying a search chair is the first, and most important, step in assembling a search committee. Wallack decided

## BEST PRACTICES: CHAIR OF THE SEARCH COMMITTEE

The role of the search committee chair is of extreme importance. According to Bridgespan, the chair must be:

- **A strong leader;**
- **A consensus builder;**
- **An effective communicator; and**
- **A person who has the time and dedication to see the search through to completion.**

to delay the decision about the composition of the committee—and whether to engage a search firm to assist with the search—until after the chair had been identified. According to Bridgespan, a nonprofit consultancy, the chair should be a figure with a mix of talents: a strong leader, a consensus builder, an effective communicator, and a person who has the time and dedication to see the search through to completion. These are rare figures, but as a result, they are usually easy to identify. The trick is recruiting them to take the position. Wallack and the board decided to aim high. “When we looked across the community, we asked ourselves, ‘Who would be our dream pick, our first choice?’” Wallack recalls. “Let’s see if we can get them.”

Two names almost immediately stood out: Aron Ain, the CEO of the fast-growing workforce-management

company Kronos, and Shira Goodman, then CEO of office-supply giant Staples. Wallack felt that Ain and Goodman both had the stature to command respect in what could be a politically contentious search. As chief executives of billion-dollar-plus corporations, they also had deep experience in assessing and hiring talent. Importantly, they both were familiar with CJP. Ain was a past member of the CJP board and a past campaign chair. Goodman was a board member at CJP and had recently co-chaired the CJP strategic planning effort.

“We didn’t just want a big name for big name’s sake,” Wallack explains. “We felt it was crucial that we selected co-chairs who understood the community and had experience with the organization.”

Wallack then set out to recruit both Ain and Goodman. He knew it was a tall order. Chairing a search committee is a time-consuming task for anyone,

let alone an active CEO. But Wallack had a few tricks up his sleeve. First, he made a straightforward case to them both about the impact of the role—the board was looking for someone to lead the Jewish community in Boston for the next several decades, so chairing the committee was a highly leveraged way to support Boston’s Jewish community. Then, Wallack used a more mischievous tactic. “I knew they had deep respect for each other and had worked together,” Wallack says. “I think one of my most proud moments was the trick of saying to each of them, ‘The other will do it, but only if you do it.’”

The ploy worked. “I’ve been trying to do less of these things,” Ain recalls. “But this was a 20-year decision for our community. We have to hire the right person. And I love working with Shira, so in the end, it was an easy decision.” Goodman agrees. “Whenever we served on committees together, it had led to lively discussion and debate—so I knew we would work well together,” she says.

Over the course of the six-month search, however, both Ain and Goodman’s commitment would be tested. Throughout the search process, Goodman helped take Staples private, while Ain oversaw the launch of a major new product line at Kronos—but both covered for each other when needed. And, more importantly, they created a deep bench of talented support by hiring a world-class search firm and assembling an all-star search committee.

### **The Right People Drive the Right Process**

Ain and Goodman agreed that they—along with Wallack and Cindy Janower, the incoming board chair—would form a “core four” of search committee members. “Aron and I felt strongly that we wanted board representation on the committee—this was a board decision after all,” Goodman explains. Before inviting any additional search committee members, the quartet agreed to hire a search consultant and ask for advice regarding the optimal size of the committee. Ain had recently finished serving on the search committee for the president of Hamilton College and felt it was a well-run search overall. But he also felt that the committee—comprised of 18 people—was too large. Goodman’s experience also led her to believe that smaller was better when it came to assembling a search committee. “A lot of committees turn into the United Nations; I need a representative from here, and a representative from there, and so on,” she says.

This posed a dilemma—CJP serves and represents a diverse constituency with a variety of stakeholders. It also has many large donors. It was likely that there would be many influential individuals clamoring for a seat at the table. “One of the reasons we engaged the search firm is that we felt its recommendation could give us cover if we started to feel pressure to grow the committee,” Ain explains. “We could point to its


recommendation.” After interviewing finalists and checking references, the core four hired Spencer Stuart.

They also introduced another way to keep the search committee small: All members should have experience assessing and hiring talent. An exception was given for any members of the “next generation”—emerging Jewish leaders who would introduce a valuable perspective but do not yet have the requisite managerial experience. This “must have” criterion provided a convenient screen to winnow down the pool of candidates for the search committee.

Still, the question of whether—and how—to tell major donors that they did not have a spot on the search committee was a delicate one. “At the end of the day, we wanted to be sure that we weren’t going to make a decision that would cause our major funding base to rethink their support,” Wallack says, “so we wanted to be conscious of their presence, but not necessarily on the committee.” In 2017, the year of the CEO search, 19 donors had each given over a million dollars to CJP. As the group of four began assembling the search committee, Ain and Goodman either called or met with all 19 donors and discussed the rationale for keeping the committee small.

“We would tell major donors, ‘We can include you on the committee, or we could talk to you along the way, and let Aron and Shira and the

committee handle it,’” Wallack recalls. Typically, the donors were more than happy to entrust the process to Ain and Goodman. It also helped that the committee they assembled instilled a great amount of confidence. “I think that helped overcome concerns and made it easier for us,” Ain says.



**There will  
be no  
spectators  
on this  
committee.**

**ARON AIN**

Ain and Goodman promised their recruits that they would operate the committee efficiently, but they were also realistic about the amount of work that would be required. In addition to the core four, the committee was eventually comprised of seven additional voting members:

- Bradley Bloom, founder of Berkshire Partners, a private equity firm
- Diane Exter, founder of Bain Capital Credit



- Joanna Jacobson, founder of one of the world's most high-profile venture philanthropy organizations
- Neal Karasic, senior vice president at SavingStar, a digital grocery coupon service
- Daniel A. Kraft, president of Kraft Group International, a multibillion-dollar private holding company based in Boston
- Ari Freisinger, an investment analyst at Highfields Capital and a “next generation” leader at CJP
- Lara Freishtat, an HR business partner at the health care technology company athenahealth and a “next generation” leader at CJP

### Laying the Ground Rules

Research shows that when it comes to group decision-making, a certain amount of discussion—and even tension—within a group is healthy. All teams are prone to groupthink, but paradoxically, teams of all-stars are particularly susceptible because of the risk of overconfidence in their abilities. From the outset, Goodman and Ain agreed that the committee should have a gender balance and a diverse mix of ages to help encourage heterogeneous thinking. Goodman had watched searches at other federations that used all-male search committees. “What that tells me is that they’re not looking to shake things up. The literature is clear: Diverse groups make better decisions.”

The pair also articulated ground rules to help assist decision-making. For their first meeting together, Ain invited the search committee to his home for dinner, where he spoke about group dynamics. Not only did he want all committee members to form their own opinions, but he also encouraged them to remain flexible and have the courage to change their minds. He said that everyone should have the confidence to offer a dissenting opinion—even if the rest of the group might disagree. In short, playing devil’s advocate should be congratulated by the group. His bottom line: “There will be no spectators on this committee.”

Ain and Goodman reinforced these ground rules as time went on. Ain recalls the first time a committee member acted in a contrary manner. He pulled her aside after the meeting to congratulate her. “I said, ‘Thank you for doing that. Can you keep doing that? I know it takes a lot of courage for you to battle 10 other people, but I’m asking you to do that every time you feel that way. Force us to defend our point of view.’” In fact, multiple committee members told Ain that after the search was complete, they planned to adopt his and Goodman’s “no spectators, all opinions welcomed” rule at all meetings they ran in the future.

Ain and Goodman also modeled this behavior. Ain is a proponent of what he calls the “un-leader.” “They put employees first,” he explained in a recent press interview to promote his

book, “WorkInspired: How to Build an Organization Where Everyone Loves to Work.” “They downplay the status that comes with their titles, preferring to put team members on the same level as they are. They show basic respect. They admit when they don’t know the answer to a question. This is not to suggest that they are ‘people pleasers.’ They know how to step up and exert their will when they need to.”

Goodman agrees: “Both Ain and I know the CEO-type who thinks the sun rises and sets on them. I can definitely say that’s not true for Aron and I’d love to think that’s not true of me. We left our CEO titles at the door and focused on getting the best out of the committee members and each other.”

Looking back on his interactions with the search committee, Marc Baker, the eventual hire, recalls that “things got real very quickly” in their first interview—with the committee probing him with direct questions, encouraging honesty from him, and reciprocating with their own. Baker remembers an informative and productive meeting that reflected well on CJP—a testament to Ain and Goodman’s team leadership.

### **Putting the COO on the Committee**

It is generally considered best practice not to include staff members on search committees. It can be difficult for staff to be objective about the requirements for the incoming CEO, and it risks undermining the new hire

if staff are part of sensitive candidate evaluations. But that practice isn’t universally adopted. In Germany, for example, all corporate boards contain labor representatives who are often employees. Against the advice of the consultants at Spencer Stuart, Ain, Goodman, Wallack, and Janower decided to invite CJP’s chief operating officer, Judy Shapiro, to join the search committee. They included a caveat: Although Shapiro would participate in interviews and post-interview discussions, she would not have a vote.

The core four felt that Shapiro qualified for the committee for several reasons: First, she had no ambitions for the top role; second, she had strong project-management skills that could help keep the committee on track; and third, she was well-respected by the professional staff of CJP. Just as Ain and Goodman would perform outreach to external stakeholders, Shapiro’s presence allowed for a form of “in-reach,” in which she could liaise with staff as the process unfolded. “Anytime you replace a long-serving CEO, there will be some anxiety among staff,” Wallack says. “People would ask questions, ‘How are they really doing this? It’s really the big donors that are deciding, isn’t it?’ She could come back and give staff confidence that the search was being professionally run.”

Shapiro’s presence also allowed the board to test its thinking against a staff perspective. “We could call upon her

### **BEST PRACTICES: USING A SEARCH FIRM**

Not all search committees need to use a search firm—but they do bring certain advantages, such as **a network of potential candidates, an ability to provide third-party objectivity, and an ability to reduce the time commitment needed from search committee members.**

Search firms can also seek out candidates who might not be actively looking for a new role and so would otherwise not respond to job postings.

In his book “It’s Not the How or the What but the Who,” Claudio Fernández-Aráoz of the search firm Egon Zehnder recommends only using executive search firms that don’t use contingency arrangements or charge percentage fees, which he believes create perverse incentives.

at various points and say, ‘Well, what do you think? How will this feel inside the organization?’” Wallack says. “She has a deep understanding of what goes on within [CJP] and we knew she was a balanced enough person that she wouldn’t push too hard for a particular type of candidate.”

### **Outreach**

Before crafting a job description, search committees or their executive search consultant should involve important stakeholders in a conversation about what sort of candidate the organization needs. This serves a trifold purpose:

- First, it uncovers challenges and opportunities of which the board may previously have been unaware.
- Second, it provides major stakeholders such as staff, clients, partners, and donors the opportunity to feel heard and included, and to voice hopes, dreams, and fears about the future.
- Finally, it helps ensure stakeholder buy-in and support for the new CEO when they are eventually appointed.

One executive search consultant who frequently undertakes searches for Jewish nonprofits compares CEO successions to marriages or funerals—momentous events that either splinter or heal communities. “It’s not exactly like therapy, but it’s close,” the consultant says.

From the outset, Ain, Goodman, Wallack, and Janower made a commitment to ensure that all CJP stakeholders felt heard in the process. “We had just finished a strategic plan that said that our community was evolving, and we needed to move with it, so from that it followed that we needed to reach out to a wide and diverse group,” Wallack explains.

The outreach took two forms: First, Ain and Goodman built a virtual open-door policy. With the help of Spencer Stuart and CJP staff, they launched a website dedicated to search updates for members of the public. They used the website to introduce the members of the search committee, make the job description public, detail opportunities for public engagement, and, eventually, announce Marc Baker’s appointment. Ain and Goodman took turns updating the website with “letters to the community.”

They also provided an email address on the website through which people could reach the search committee. While the incoming email was monitored by Spencer Stuart, Ain himself fielded dozens of messages and calls. Most of them were recommendations for potential candidates. Handling these calls required diplomacy, as callers felt invested in their referrals and convinced they would be the right choice. “Anyone who called me I talked to,” Ain says. “So somebody would call to say, ‘Oh, Yakamflatch Jones, he’s from Arizona, I winter there, he’s the greatest.’ [Or]

‘Gobbledygook Smith from Ottawa, you’ll never find anyone better.’ I would thank them and put the name in my notebook. And you know, we reached out to every single one of these recommendations. We got some great names through that process.”

Throughout the summer of 2017, the committee also engaged in extensive outreach to various stakeholders. Spencer Stuart spent the day at CJP offices meeting with staff to understand their views on what would make a great future leader. To tease out insights, the consultants asked three questions:

1. What makes CJP distinctive?
2. If you could put yourself in a rocket ship and go forward six years, what is different about the organization that makes it even stronger than today?
3. Bearing in mind your answers to the first two questions, what qualities should we be looking for in our next president?

The search firm also led conversations with various individuals and groups that represented community leadership. This included conversations with heads of the partner agencies, former board chairs of CJP, heads of Jewish day schools, the Massachusetts Board of Rabbis, CJP board members, and representatives from ethnic groups such as Russian-speaking Jews and Israelis. Ain and Goodman set a goal of

having at least one committee member attend each meeting. To ensure no voices were missed, Spencer Stuart built an online survey that went out to an email list of more than 25,000 CJP supporters and interested individuals to solicit additional feedback.

“One of the most important things that Shira, Aron, and the whole committee did from the beginning was really send the signal that they wanted to hear from all the important groups and stakeholders,” Mary Gorman, a Spencer Stuart consultant, recalls. “We did a very broad outreach.”

Gorman adds that although committee members were present for most of the meetings, there were some that Spencer Stuart recommended they do on their own without committee members. “For example, when we spoke with the heads of agencies [that receive funding from CJP], we felt they could be more forthcoming without any fear, justified or not, about how CJP representatives might hear or interpret their feedback.”

### **Crafting the Job Description**

Ain, Goodman, Wallack, and Janower felt that writing the physical job description—or “position and candidate description” as it would come to be known—was one of their most important tasks. Indeed, when they interviewed search firms, they asked to see previous job descriptions from each firm as part of their screening

process. The community outreach was intended to inform the document.

A CEO transition provides an organization with a unique opportunity to take stock and do a strategic review. However, experts disagree about whether it is best practice to delay a formal strategic planning session until a new CEO is in place so as to ensure they are able to contribute meaningfully to the strategy without feeling handcuffed by the board’s decisions. In CJP’s case, the board had decided to undertake a strategic plan in 2016 even though it knew of Shrage’s upcoming departure.

“We kind of debated back and forth about whether we should hire a new president and then do the strategic plan, or vice versa. There’s probably no great answer to that, either can work,” says Goodman, who was chair of the strategic planning committee. “If you’ve done your strategic plan, you know what you’re looking for. So we knew we were looking for change. We knew we were looking for an innovator, someone who could relate to the next generation. That was very helpful.”

Goodman adds the strategic planning committee intentionally made the new strategy both visionary and aspirational, rather than prescriptive. “It was like a framework. It wasn’t at such a detailed level that we just handed it over to the candidates,” Goodman recalls. “I think the candidates really appreciated having

## STRUCTURED INTERVIEWS

Structured interviews were pioneered in the Israeli military by Daniel Kahneman, who would go on to win a Nobel Prize in economics. Since that work, the futility of unstructured interviews has been well-documented:

- In the most recent study showing the futility of a “fireside chat” approach to interviews, Google looked at tens of thousands of its unstructured interviews, what the candidate scored on the interviews, and how that person ultimately performed on the job. It found zero correlation.
- What’s more, unstructured interviews lead to unwitting discrimination. During informal interactions, interviewers tend to have more favorable impressions of candidates who they resemble.
- Finally, a structured process that requires the assessors to score each answer helps ensure that search committees listen carefully through the entire interview process, which avoids discriminating against candidates who start interviews awkwardly or slowly because of nerves.

it and knowing that the board was aligned around a clear vision.”

Wallack says that Spencer Stuart helped pull together insights from both the strategic plan and the community outreach into the job description. “We knew the heart and soul of what the job description should include. They were very good at making sure we covered all the details and translated them.

They also helped with screens: How many years of experience leading an organization do we need? What kinds of experience are we looking for when it comes to fundraising? And so on.”

Janower, the incoming chair, adds that the presence of a strategic plan reassured candidates that the board was committed to a “post-Barry-Shrage” chapter. “I suspect many of the

candidates, as they considered following a beloved 30-year leader, worried that they'd be expected to be Barry's clone and continue to lead the community as he had; but our plan demonstrated that we saw a need to embrace new ways of working (despite our considerable success), given the changes in our environment. Several candidates found this energizing," she says.

As they were finalizing the job description, one innovation in its composition came from Bradley Bloom, a managing director at Berkshire Partners, a private equity firm. Bloom told the group that in the private equity world, which requires a laser focus on value creation over short- and medium-time horizons, chief executives often are held accountable to outcomes set by the investor group. The committee felt it would be useful for the job description to include a section that would list what success would look like for the new president once they had been in the position for a while. Under a section titled "What We Will Accomplish," the job description listed outcomes such as "CJP will have active and productive partnerships throughout the Jewish community" and "CJP will be a high-functioning organization that attracts, develops, and retains top talent."

Baker, the committee's eventual hire, recalls that when he read the job description, he felt a sense of relief. Baker knew that a candidate's vision for the role does not always align with the

board's vision, "so the document served as a kind of reality check," he says.

"As I read it, I felt like, 'you know what, they've got this pretty right; this is the right vision for the future leadership.'"

Baker adds that the job description was an "important data point" during his research into whether the role would be a good fit for him. "Every interaction you have with the board and the search committee is a learning opportunity."

### **Screening the Candidates**


Because the committee had identified the need for an outsider's perspective to move CJP into its next phase, the committee decided to cast a wide net when sourcing candidates. The early stage of this work fell to Spencer Stuart. All of the names that Ain and Goodman received via referrals were added to a register that the consultants had already built from their own contacts. It was a diverse list and included a famous Jewish television personality, a former U.S. ambassador, and several executives from the for-profit sector. For many of the names on the list, it wasn't known if they'd even be interested in the position. "There was a view that we can't just rely on the people we know," Diane Carlyle, a senior associate at Spencer Stuart, says. "So we had to do extensive research and be very thorough in our outreach."

The final list tallied around 500 potential candidates. From that, Spencer Stuart conducted preliminary interviews with 80 candidates, eventually narrowing the

pool to 30 qualified prospects whom it sent to the committee for review. The committee reviewed their resumes and decided to invite six people to Boston for interviews.

On the advice of Spencer Stuart, Ain and Goodman agreed that the interviews should be structured, rather than free-flowing. Ain and Goodman drafted a list of behavioral-event questions designed to probe candidates' past behavior as a way to ascertain whether they possessed the qualities listed in the job description. They also assigned each question to an appropriate committee member who would ask the question and handle follow-up queries during the interviews. For example, a question about working with younger Jews was given to one of the "next generation" committee members; a question about fundraising was given to one of the major donors on the committee. Each committee member was instructed to fill out a score sheet for each candidate as the interview progressed.

Regarding the mechanics of the interview, Goodman and Ain decided to break from Spencer Stuart's advice. Instead of having the entire committee present for the entirety of each candidate interview, the pair decided to break the committee into two smaller groups. The six interviews were to take place over two days—three candidates each day. One of the committee's subgroups would meet with the first candidate at Spencer Stuart's offices; the other would meet with the second candidate in a board room at a hotel across the street. Halfway through the interview, the groups switched places, walking across the street to finish the interview. Ain felt that keeping the groups smaller would encourage deeper listening and participation. But the process meant that half of the committee wasn't present for the candidate's answers to certain questions. These members had to learn of the answers through the recollections of the other group, which is to say by hearsay—an inherently unreliable process and one that is prone to errors.



**Every interaction you have with the board and the search committee is a learning opportunity.**

**RABBI MARC BAKER**



Still, Ain and Goodman’s insistence on structured interviews (i.e., the same questions asked by the same committee members in the same way to all candidates)—as well as their expert facilitation—paid off. The group felt a clear favorite had emerged: Marc Baker. To drill down further, the committee then sent several case studies and scenarios to Baker, such as asking him for his plan to reform CJP’s community involvement, or how he would react to donors who insist on restricting gifts to certain programs. Baker sent his thoughts via email—offering an opportunity for the committee to gauge his writing skills—before an in-person follow-up conversation with the committee. Unprompted, he also sent the committee a document that included his view on the concept of leadership—a document that Wallack says was particularly well-received.

“He came across as proactive and detail-oriented. The extra screen of the cases and his writing sample proved valuable in confirming to [the committee] that we had the right person for the job,” Wallack says.

Spencer Stuart handled the reference checking. Instead of asking the candidates for a list of references, the consultants used LinkedIn and other tools to build a list of people they wanted to interview, and then they asked the candidate for permission to reach out to them. As the committee narrowed in on Baker, Spencer Stuart

encouraged committee members to also conduct reference interviews, particularly if they had personal connections with people who had worked with the finalist in the past. One of the quotes that surfaced during these reference checks would eventually be used by Ain and Goodman in their letter announcing Baker’s appointment: “His heart beats for every Jewish person on the planet.”

### **The Inside-Outside Leader**

Studies of for-profit companies have shown that outsiders who join the company three to four years before they become CEO perform as well as insiders with much longer tenures who are promoted to the top job, a crossover category that Harvard Business School’s Joseph Bower calls “[the inside-outside leader](#).” To Bower, inside-outside leaders maintain an outsider’s perspective, which they use to jettison outdated organizational habits, while also remaining sensitive to a company’s culture so their changes aren’t rejected.

As it became clear that he was a leading candidate in the search, Baker felt he was an inside-outside candidate. As a Boston native who had served as head of school at one of the area’s most prestigious faith schools, he knew many members of the search committee and CJP board personally. He also was deeply familiar with CJP—his school was a past grant recipient and Baker had

been the scholar-in-residence as part of CJP's leadership program since 2012.

During his interview with the search committee, Baker shared his thoughts for CJP's future. "I asked them, 'How honest do you want me to be this early in the process?'" Baker recalls. Encouraged to speak freely, he remembers an exciting, productive conversation in which he felt the committee members and he were collaborating and problem-solving together. "What impressed me about the committee wasn't their resumes," Baker says. "But their talent and intelligence. We spoke exactly as I want to be able to speak to a board—with honesty."

Baker clearly stood out as a favorite—but this posed a dilemma to the CJP board. "When we decided to pursue Marc, it was a big decision," Goodman says. "We had other viable candidates, so putting all of your chips on one spot can be risky." To help mitigate the risk, Ain and other board members reached out to Baker to assess the seriousness of his interest in the position. "Before we went all in with Marc, we needed to confirm that he was all in with us," Ain recalls. "Conversations with Marc and the search committee took place to confirm his direction. I may have had most of these conversations with him, but I was not the only one." Ain adds that the entire board worked in unison to ensure its interest was reciprocated.

When Baker assured Ain and others of the seriousness of his candidacy, the board then faced another

challenge: Baker's close ties with CJP posed complications. As the Jewish community develops its leadership pipeline, organizations will increasingly look to recruit leaders from close partners—as CJP did with Gann Academy. When Baker was offered the job, Wallack approached the board at Gann Academy. The two organizations decided to announce the appointment simultaneously. CJP provided marketing and PR support for Gann, and the two organizations coordinated messaging. Wallack believes that the two organizations handled what could have been a contentious situation with professionalism and generosity, choosing to see Baker's appointment to such a high-profile role as a win-win for both organizations.

### **After the Handshake**

While the CEO search process officially ends when the deal is inked, the board's responsibilities for ensuring a successful transition do not. The chief responsibility of any board is management of the senior executive—and ensuring that they successfully transition into their new role is a major undertaking. Nonetheless, CEO onboarding remains a weakness even in the for-profit sector, and the problem is particularly acute in the nonprofit sector. A Bridgespan survey of nonprofit CEOs found that nearly half (46%) got little or no onboarding help from their boards. As one executive told Bridgespan, "The board essentially said,

‘We’re glad you’re here. Here are the keys. We’re tired.’”

CJP was determined to break this mold. After completing negotiations with Baker, Wallack and Janower drafted a transition plan that began immediately and lasted through the six months’ notice that Baker gave Gann Academy and into the first year of his tenure at CJP. “We didn’t wait for his first day to get started,” Wallack explains. “We got to work helping educate Baker about CJP and establishing 30-, 60-, 90-, and 365-day plans.”

Wallack and Janower formed two groups to assist Baker. The first, which they called the transition working group, consisted only of Baker, Wallack, Janower, Shapiro, and David Strong, CJP’s chief financial officer. The group also pulled in outgoing CEO Barry Shrage and others as needed. Through weekly conference calls with Baker, the transition working group addressed tactical questions related to the transition. These included crafting a learning agenda for Baker, prioritizing meetings, and formulating a communications strategy, among other priorities.

Within the learning agenda, the working group oversaw three deep dives: a staff-led conversation about issues such as the organizational map (structure, finances, programming, strategic plan, etc.); the community map (agency partners, national and international institutions, media landscape, etc.); and

the stakeholder map (beneficiaries, donors, volunteers, etc.). Each session was scheduled for several hours and included extensive pre-reads for Baker to absorb and interpret.

Simultaneously, Wallack and Janower also created what they called Baker’s transition cabinet, a group of a dozen or so strategic advisers such as former board chairs, search committee members, and other longtime stakeholders. The group’s *raison d’être* was to assist Baker with his cultural inculcation. It met with Baker in person several times and discussed topics such as the community landscape and historical context, advice on relationship-building inside and outside of the organization, and personal goal setting for Baker. Cabinet members were available individually for ad hoc advice as well. The interactions were designed so that Baker could continue to benefit from the relationships throughout his tenure. And Shrage, the outgoing executive, also let Baker know that he was welcome—but not obligated—to use him as a sounding board and resource throughout the transition period.

This transition work was in addition to Baker’s “day job” of transitioning out of his leadership position at Gann Academy. Wallack says that he and Janower were in close contact with the board at the school to ensure that no lines were crossed. Transitions can be periods of increased productivity for

incoming executives as they harness their excitement around their new appointment, and Baker's commitment to hitting the ground running at CJP was palpable to Wallack. "He worked harder," Wallack explains, when asked how Baker balanced his outgoing and incoming leadership responsibilities.

The CJP board felt that its obligation to ensure a successful CEO transition should be focused not only on the incoming CEO, but also on helping the outgoing CEO as well. Yale School of Management's Jeffrey Sonnenfeld, who wrote eloquently about CEO departures in his book, "The Hero's Farewell," describes the end of an illustrious CEO's tenure as "a plunge into the abyss of insignificance, a kind of mortality." Wallack, Janower, and CJP's board were committed to helping Shrage navigate this tricky transition in his career.

Around the time that the board launched its search for Shrage's successor, a working group was also formed, dedicated to supporting Shrage in his own transition. The group consisted of several former chairs of the board and a couple of other key volunteers who had overseen Shrage at various points in his tenure, including Wallack. As is typical for productive, long-serving CEOs, Shrage wasn't seeking retirement upon stepping down, but rather a new chapter in his professional life. Over the course of more than a year, the group helped him formulate what that might mean.

The support started with general conversations about Shrage's goals and then narrowed as it became clear that Shrage was interested in academia. Members of the group eventually worked directly with Shrage as he negotiated an agreement with Brandeis University to become a member of its faculty.

For Wallack, all of the hard work of the various committees and the board came together in early 2018. Baker's appointment was met immediately with excitement and enthusiasm throughout the community and beyond, and the transitional period began as hoped and planned. Only a few months after the board announced Baker's selection, Brandeis issued a press release announcing Shrage's appointment as a professor of practice at the university's Hornstein Jewish Professional Leadership Program. "We wanted to be thoughtful about all aspects of the search," explains Wallack. "A CEO transition is a two-sided coin—a beginning and an ending. We felt a responsibility to make sure both went smoothly."

## EPILOGUE

Few organizations in Jewish life can match the intensity and scale of CJP's search. But looking back on their tenure as search co-chairs, Goodman and Ain believe that the root cause of the organization's success was not its intricate and extensive process—rather, it was the **external manifestation of CJP's decision to recruit the best people to undertake the search.** As Goodman says, “The right people drive the right process.” By finding two high-profile, engaged search chairs—and empowering them to assemble a committee of all-stars—CJP provides a model for other organizations undergoing their own CEO transition.

## APPENDIX - JOB DESCRIPTION

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### Position and Candidate Specification



Make a bigger difference.

Combined Jewish Philanthropies of Greater Boston

### **President and Chief Executive Officer**

**PREPARED BY:**

Jennifer Bol  
Mary Gorman  
Diane Carlyle

October 2017  
Assignment: 64014-001

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## APPENDIX - JOB DESCRIPTION

## About the Organization

Combined Jewish Philanthropies of Greater Boston

Combined Jewish Philanthropies (CJP) is at the heart of Greater Boston's Jewish community, but its reach is felt around the world. Our mission is to inspire and mobilize the diverse Boston Jewish community to engage in building communities of learning and action that strengthen Jewish life and the world around us.

Founded in 1895 as the Federation of Jewish Charities of Boston, the organization has grown tremendously in terms of members, scope of impact, and dollars raised. Today CJP is the third largest Federation in North America out of 160 such organizations. For fiscal year 2017, CJP will invest over \$64 million in the community. CJP is recognized as one of the most efficiently operated, fastest growing, and most successful Jewish Federations in the country and was recently ranked as the largest nonprofit in Massachusetts by the *Boston Business Journal*.

In addition to raising funds for its programmatic agenda and to support community organizations, CJP manages philanthropic capital totaling \$1.76 billion, comprised of its own permanent endowment, the assets of 85 Jewish organizations that invest their own endowments with CJP as Partners and Co-Investors, and a Donor Advised Fund program that distributed \$110.6 million in grants locally, nationally, and globally last year. The organization has developed a strong planned giving program to help grow CJP's endowment and secure the community's future.

In addition to CJP's staff of nearly 170, one of the organization's greatest assets is its network of approximately 800 volunteers who devote their time, expertise, and connections to help the organization in its governance, operations, fundraising, strategic planning, public affairs, and more.

### COMMUNITY CONTEXT

CJP has become a highly complex and multi-faceted organization, with dozens of strategic programs impacting people in Greater Boston, nationally, and internationally. The next leader of CJP will join the organization at an auspicious time. The CJP community invested in developing a strategic framework in recent months, and the new President and CEO will inherit the in-depth thinking and analysis from this process.

The 2015 Greater Boston Jewish Community Study revealed significant changes in the community over the past 10 years – re-urbanization (where there are relatively few synagogues and traditional Jewish institutions), significant shifts in denominational affiliation, and a diversity in backgrounds (many more Israelis and Russians) – which has impacted the ways of engaging community and in the sources from which people derive meaning. Most significantly, young adults are coming of age in a unique context that shapes their values: almost half are children of interfaith parents, many are skeptical about particularism, and suspicious of conformity and institutionalism. While successful synagogues and other organizations continue to create vibrant communities for many in our community, there is also a growing interest – particularly among Israelis, Russians, LGBTQ, and young adults – in new spiritual and cultural outlets.

Moreover, Israel – once a source of unifying pride for American Jews – has become a polarizing topic for many in the community. The challenge is to foster broad engagement of diverse viewpoints and inspire those, who do not see Israel as relevant to their lives, to understand its profound significance to the Jewish people. In light of

## APPENDIX - JOB DESCRIPTION

### COMBINED JEWISH PHILANTHROPIES OF GREATER BOSTON

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this and other political issues that have the power to divide, CJP's role in bringing the community together in pursuit of collective goals has never been more important.

Philanthropy is also changing. Donors are increasingly results-focused and data-driven. Seeking to feel the impact of their gifts, they prefer directed giving over donating unrestricted funds to large umbrella organizations. Millennial donors approach philanthropy with a particularly global, social, and inclusive outlook.

Trends like these have shaped CJP's vision and strategy over the years. These latest insights from the 2015 study underscore the organization's focus in five areas:

- Caring: Ensure that every vulnerable person in our community has access to the services needed to move from crisis to stability
- Justice: Work to build a more just and peaceful world
- Jewish Life and Learning: Enable our diverse community to experience the richness of Jewish life
- Israel: Inform, engage, and empower our community to effectively engage with and support Israel's future
- Community: Invest in the leadership and resource capacity of the community

### FINANCIAL AND OPERATIONAL HIGHLIGHTS

Staff: ~170

Total annual budget: \$64.4 million

Endowment: \$1.76 billion, inclusive of Endowment, Donor Advised Funds and other assets as well as philanthropic capital managed for other organizations

For more information about CJP, please visit: <https://www.cjp.org/>



## APPENDIX - JOB DESCRIPTION

## Position Summary

Combined Jewish Philanthropies of Greater Boston

The President and Chief Executive Officer (CEO) of CJP represents the Jewish community in the Greater Boston area. With a focus on supporting and serving the Jewish community in a courageous and inclusive manner, the CEO is responsible for providing strategic leadership and bringing the community to the next level of engagement and impact. She/He will be able to attract the best volunteers and professionals – including those of the next generation – to the organization and will drive operational excellence. She/He will act as CJP's chief spokesperson and as an ambassador and advocate for the region's Jewish community, clearly articulating its needs and values, and inspiring and engaging all members of this vibrant and diverse community. The CEO will also serve as a leading convener for the Greater Boston Jewish community as well as CJP's chief fundraiser. Skilled at creating and nurturing relationships, he/she will be genuinely energized by being with other people. It is essential that the CEO demonstrates a keen love of Jewish life and learning.

**KEY RESPONSIBILITIES**

- Shape CJP's going-forward strategy to drive engagement and impact:
  - Informed by the strategic framework and by on-going discussions, communicate a coherent and compelling vision that inspires already active members of the community, attracts the next generation, and creates multiple opportunities for the unengaged to become involved with CJP.
  - Develop a clear and actionable set of priorities for CJP that will address the critical issues for the Jewish community in the Greater Boston area, nationally, in Israel, and other parts of the world.
- Convene the Jewish Community:
  - Be an active voice for the Jewish community on the critical and complex issues it faces and harness the resources and support required to effectively drive inclusion and action.
  - Create and maintain a big tent for the Greater Boston Jewish community that includes diverse stakeholders and connects individuals collectively across the community.
- Build CJP's Resources:
  - Provide leadership for all of CJP's fundraising efforts. Increase discretionary funding by actively engaging existing and new donors in CJP's key priorities and needs.
- Develop innovative new approaches to fundraising:
  - Diversify the donor base, increase campaign participation, and develop the next generation of donors.
- Build a world-class organization:
  - Recruit, develop, and retain top talent, build high-functioning teams and robust systems and practices.
  - Nourish an organizational culture that will continue to support growth, innovation, and change.

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COMBINED JEWISH PHILANTHROPIES OF GREATER BOSTON

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### DESIRED OUTCOMES – WHAT WE WILL ACCOMPLISH

- CJP will drive increased engagement in service and participation across the Jewish community. In particular, CJP will develop and implement successful new models that engage emerging groups – the next generation, Russians, Israelis, LGBTQ, and others – in ways that are meaningful to them.
- The priorities of the community will be well understood and communicated; CJP's impact model will be well-aligned and measurable against those priorities and will have the ability to flex and adapt as the needs of the community change and evolve. CJP will actively measure impact and share results.
- CJP will be an inspiring and trusted convener within the community, with the ability to drive a strong sense of inclusiveness and comity, even in the face of divisive or controversial issues which, without CJP's leadership, could divide the community.
- CJP will have active and productive partnerships throughout the non-Jewish community.
- CJP's fundraising model will be reimagined and reinvented in ways that are responsive to the changes in donor attitudes and CJP community priorities and allow CJP to grow resources for the community.
- CJP will be a high-functioning organization that attracts, develops, and retains top talent with a strong organizational culture characterized by purpose, caring, and innovation, deeply rooted in Jewish values.

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SPENCER STUART

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## APPENDIX - JOB DESCRIPTION

### Candidate Profile

Combined Jewish Philanthropies of Greater Boston

Grounded in Jewish values, the President and CEO of CJP will be an inspirational leader and skilled institution-builder with an abiding love for the Jewish people and a deep commitment to nurturing and strengthening the Jewish community. The CEO will be present and highly visible in the Jewish community, investing the time to listen and understand the evolving needs of all of its constituencies. With a keen ear, political savvy, and excellent judgment, she/he will excel at building, maintaining, and leveraging relationships with a myriad set of stakeholders, both Jewish and non-Jewish, in the Greater Boston area, along with key national and international partners. The CEO will establish herself/himself as a trusted partner to the Board, a dedicated leader and mentor to the staff, and an influencer and convener in the community.

#### CRITICAL LEADERSHIP CAPABILITIES

##### Strategic Focus

CJP is one of the most innovative and successful Jewish Federations in North America. During a time in which there is tremendous change both in the Jewish community and in philanthropy, it is essential that the next President and CEO:

- Understand the many ways in which both the Jewish community and philanthropy are evolving, including the implications for current and future programmatic initiatives and funding.
- Articulate a vision and direction for CJP that engages and energizes the entire Jewish community.
- Meet people where they are in their Jewish journey, and provide multiple ways to engage with CJP. Of particular importance, prioritize a deep commitment to engaging and developing the next generation of individuals and leaders within the Jewish community.

##### Leading Change

At a time of change both within CJP and externally, the next CEO must continue to build a culture that is innovative, dynamic, and nimble. The next President and CEO will:

- Create and nurture an environment that encourages bold thinking and risk-taking. Convene thought-leaders and engage a broad range of constituents in imagining the highly effective federation of the future.
- Develop and empower change-leaders across the organization. Identify and involve key influencers, volunteers, and community partners in the design and implementation of change initiatives.
- Build innovative new models for engagement and convening that inspire individuals to participate in CJP's initiatives and support the Jewish community.

##### Organization Building

A large complex organization with outsized impact and evolving demands, CJP must develop a strong organizational framework to accomplish its ambitious goals. To do this, the next President and CEO will:

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- Attract, develop, and motivate a talented staff within the organization and inculcate the environment with a strong sense of teamwork.
- Drive organizational performance across multiple dimensions – processes, practices, and systems – for measurable positive impact both internally (e.g. professional and career development, diversity and inclusion) and externally (e.g. impact, fundraising, thought leadership, and influence).
- Create an organizational structure that is both robust and flexible, permitting the organization to be highly effective, responsive, and fluid.

### Collaborating and Influencing

The CEO will be a strong relationship builder who is comfortable in most settings and who has deep experience serving as the external face of an organization. In addition to excelling as a convener, she/he will play a leadership role in supporting and nurturing the broader Jewish community in the Greater Boston area. The next President and CEO will:

- Develop strong, authentic relationships with people. She/He will listen well, connect with people, and care deeply about individuals, families, and the Jewish community as a whole.
- Demonstrate keen and sophisticated influencing and negotiation skills, adapting to the individual, organization, and/or situation.
- Build partnerships with individuals, as well as local and national agencies and organizations, based on a shared commitment to the Jewish community and Jewish values, embracing differences in opinion to advance a common shared set of goals.

### OTHER PERSONAL CHARACTERISTICS

- Deeply committed to the Jewish people
- Authenticity and the highest level of integrity
- Intellectual heft and curiosity
- Commitment to diversity and inclusion
- Courage coupled with judgment and stamina
- Demonstrable connection with the next generation
- Energy

### IDEAL EXPERIENCE

#### **10+ years of senior leadership experience in a complex, multi-stakeholder organization**

Management experience at the organizational level is preferred; management at the department level is required.

#### **Experience serving as the public face of an organization**

Outstanding verbal, written, and social media communication skills as well as empathetic listening skills.

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### **Proven track record of fundraising**

Individuals with no experience in the nonprofit sector must demonstrate comparable experience in their sector, including success at cultivating relationships and asking for, obtaining, and structuring financial and in-kind support, either as a CEO, a volunteer fundraiser, or as an executive leader.

### **Experience working with a Board**

Experience serving as principal advisor, partner, and liaison to a Board.

### **Substantive knowledge of Jewish thought, history, and culture**

A deep love of the Jewish people and a demonstrated ability to incorporate Jewish learning into communications and leadership style.

### **Passion for and knowledge of Israel**

A great supporter of Israel.

### **Bachelor's degree**

An advanced degree is preferred.

### **APPLICATIONS OR NOMINATIONS**

To apply or nominate an individual for this position, please send an email with resume and cover letter, if applicable, to [CJPPresident@SpencerStuart.com](mailto:CJPPresident@SpencerStuart.com).

## APPENDIX - INTERVIEW FRAMEWORK

### CJP PROPOSED INTERVIEW FRAMEWORK

#### ROUND 1:

- Committee splits into two groups led by Aron and Shira
- Each group will meet with candidates for a 75-minute interview with a 30-minute break to debrief and move
- One group will be at Spencer Stuart and one group will be at CJP (they are next door to each other); candidates stay in one location to avoid running into one another
- Each group will cover different topic areas to ensure that candidates don't have to cover the same ground twice. Suggested splits:
  - Group 1 – Strategy development and execution, organization development and capacity building, community engagement
  - Group 2 – Change management, developing institutional partnerships, fundraising, Jewish knowledge
- What this looks like – each day for 2 days, depending on the number of candidates invited:

Time	Group 1	Group 2
8:30-9:00	Pre-brief	Pre-brief
9:00-10:15	Candidate A	Candidate B
10:15-10:45	Debrief and Move	Debrief and Move
10:45-12:00	Candidate B	Candidate A
12:00-12:45	Debrief and Lunch	Debrief and Lunch
12:45-2:00	Candidate C	Candidate D
2:00-2:30	Debrief and Move	Debrief and Move
2:30-3:45	Candidate D	Candidate C
3:45-4:15	Debrief and Reconvene	Debrief and Reconvene
4:15-5:15	Full Group Debrief	Full Group Debrief

#### ROUND 2:

- Committee as a whole meets with finalists
- Possible to add small group breakfasts, lunches, or dinners on “the shoulders” of the interviews if desirable
- Prior to the interviews, the Committee will develop two “thought questions” which will be shared with candidates in advance, possibly with a small amount of supporting material
  - Candidates will be instructed to come to the meeting prepared to lead a discussion around both thought questions
- Second round interviews are typically two hours divided as follows:
  - 1 hour for discussion of two thought questions, approximately 30 minutes each
  - 30 minutes for candidate-specific follow-up questions (developed by 2-person teams from the committee assigned to each candidate)
  - 30 minutes for questions from the candidate
- Sample day:

7:30-9:00	Breakfast Candidate A	
9:30-11:30	Interview Candidate A	
12:00-1:30	Lunch Candidate A	Lunch Candidate B
2:00-4:00		Interview Candidate B
4:00-5:00	Committee Debrief	Committee Debrief
6:30-8:00		Dinner with Candidate B

- Round 2 schedule will be determined once we know how many finalists there are and the types of issues the Committee wants to explore with each of them

**APPENDIX - EVALUATION GRIDS**

**PRESIDENT & CEO  
CONFIDENTIAL CANDIDATE EVALUATION GRID**

TEAM ARON INTERVIEW QUESTIONS	Candidate Name: _____		
	Strengths	Weaknesses	Rate 1 to 5
CHANGE MANAGEMENT	• •	• •	
DEVELOPING INSTITUTIONAL PARTNERSHIPS	• •	• •	
FUNDRAISING	• •	• •	
JEWISH KNOWLEDGE	• •	• •	
OTHER	• •	• •	

Please provide qualitative feedback in areas marked by bullet-points, for review when the search committee convenes for its debrief  
**RATE EACH ASSESSMENT ON A SCALE OF 1 TO 5: 5 EXTRAORDINARY, 4 ABOVE AVERAGE, 3 AVERAGE, 2 BELOW AVERAGE AND 1 NOT ACCEPTABLE**

**PRESIDENT & CEO  
CONFIDENTIAL CANDIDATE EVALUATION GRID**

TEAM SHIRA INTERVIEW QUESTIONS	Candidate Name: _____		
	Strengths	Weaknesses	Rate 1 to 5
STRATEGY DEVELOPMENT AND EXECUTION	• •	• •	
ORGANIZATION DEVELOPMENT AND CAPACITY BUILDING	• •	• •	
COMMUNITY ENGAGEMENT	• •	• •	
OTHER	• •	• •	

Please provide qualitative feedback in areas marked by bullet-points, for review when the search committee convenes for its debrief  
**RATE EACH ASSESSMENT ON A SCALE OF 1 TO 5: 5 EXTRAORDINARY, 4 ABOVE AVERAGE, 3 AVERAGE, 2 BELOW AVERAGE AND 1 NOT ACCEPTABLE**

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**Eben Harrell** is a senior editor at Harvard Business Review (HBR). Before joining HBR, Harrell worked as a foreign correspondent in the London bureau of TIME; as an associate at the Harvard Kennedy School; and as the head of thought leadership for L.E.K. Consulting, a strategy consultancy. An award-winning reporter, writer, and editor, Harrell has published articles in TIME, The Economist, The Washington Post, Sports Illustrated, and other major titles. In 2017, Harrell and UC Berkeley professor Dacher Keltner won the Warren Bennis Prize, which is awarded each year by the USC Marshall School of Business to the editor and author of the best article on leadership in Harvard Business Review. Harrell holds a master's degree from the University of St. Andrews and a bachelor of arts from Princeton University.





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Founded in 2014, Leading Edge seeks to influence, inspire, and enable dramatic change in attracting, developing, and retaining top talent for Jewish organizations so that the Jewish nonprofit sector may thrive.

**[www.leadingedge.org](http://www.leadingedge.org)**

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