

The Schusterman Family Foundation

Schusterman Fellowship Evaluation Executive Summary

May 2017

Prepared by:



LEARNING *for* ACTION

Evaluation Purpose & Methods

The Schusterman Family Foundation engaged LFA in 2016 to understand the impact of the Fellowship’s pilot program and satisfaction with the program. LFA worked with the Foundation to clarify the Fellowship’s Theory of Change, which specifies the intended outcomes for Fellows and the Jewish sector and became the foundation of the Fellowship’s evaluation plan. This evaluation includes data collected from Fellows who participated in the first cohort of the Fellowship from June 2015 to September 2016. Data were collected between November 2016 and February 2017. Future evaluation will include the experiences and outcomes of additional Fellow cohorts.

Research Questions

- 1. What is the impact of the Fellowship on Fellows and the Jewish sector?**
- 2. How do different components of the Fellowship contribute to Fellows’ leadership growth and successes?**

Methods

An In-Depth Review of Fellowship Materials

LFA reviewed Fellowship materials, such as Leadership Practice Inventory (LPI®) scores and information about Fellows’ Organizational Change Initiatives, to inform the evaluation.

Survey of Fellows

Fellows from Cohort 1 completed an online survey that was launched in November 2017, approximately 3 months after the end of the Fellowship. The survey had a 96% response rate (n=22).

Interviews With Fellows and Their Supervisors

LFA conducted one-on-one phone interviews with a group of Cohort 1 Fellows (n=13) and their Supervisors (n=11) in early 2017. LFA compiled and themed notes from each interview.

Demographic Composition of Cohort 1

 **9**
women

 **14**
men

 **8**
international

 **15**
US-based

 **5**
lay leaders

 **18**
professional leaders

Evaluation of Fellowship Impact



Increase in Responsibilities and Recognition

Fellows have increased responsibility in their positions, and have been honored with leadership awards, have spoken at conferences, published Op-Eds, or have received verbal recognition from supervisors.

94% of professional¹ Fellows report an increase in their professional responsibilities

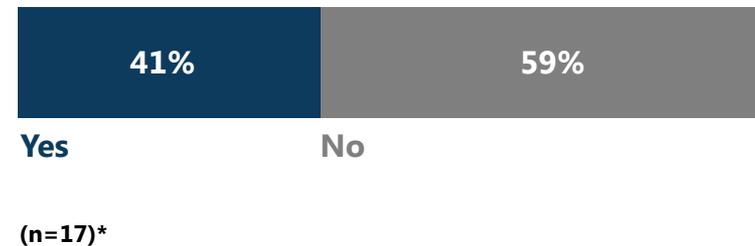
41% of professional Fellows have received a formal promotion, two of which were to the “C-Suite”

80% of lay Fellows have experienced an increase in their lay leadership responsibilities

Almost All Fellows Report an Increase in Professional Responsibilities



Some Fellows Have Received a Promotion



¹Professional Fellows are currently working in jobs in Jewish sector organizations. Lay Fellows are currently serving in volunteer roles in Jewish sector organizations.

*Responses from professional Fellows only



New Opportunities and Networking

Fellows widely report exploring new opportunities since the start of the Schusterman Fellowship.

68% of Fellows report they have been recruited for a lay leadership opportunity

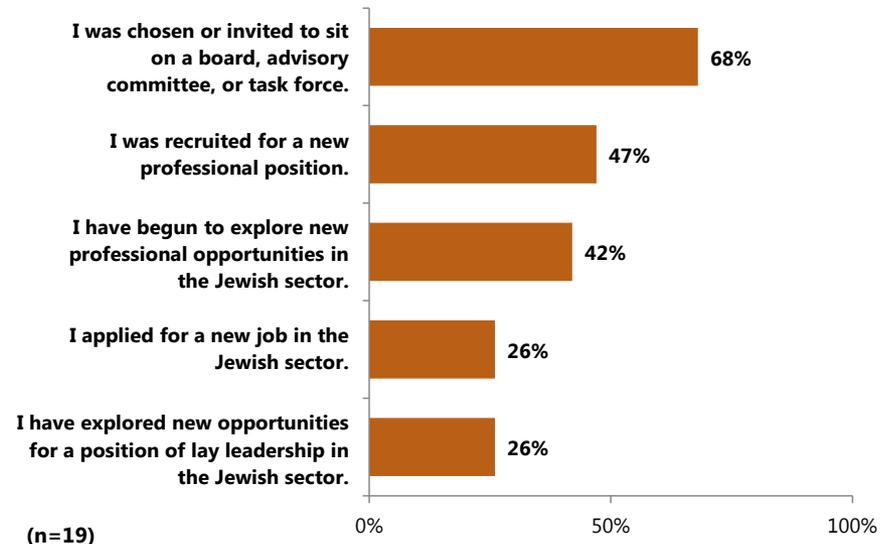
47% of Fellows report they have been recruited for a professional opportunity

- Among those who have applied for new jobs, or explored new professional opportunities, most say they have been influenced by the Fellowship to do so.
- Fellows also report beginning new collaborations through their Fellowship network connections.
- The usefulness of the network for networking and job opportunities, which are predominantly based in the US, is lower for international Fellows.

Sector Impact

Increases in leadership opportunities for Fellows and expansion of Fellows' networks suggest that, even during its pilot cohort, the Schusterman Fellowship is creating a positive impact on Jewish leaders and the sector more broadly.

Fellows Report New Opportunities Since Beginning the Fellowship



Commitment to Leadership in the Jewish Sector

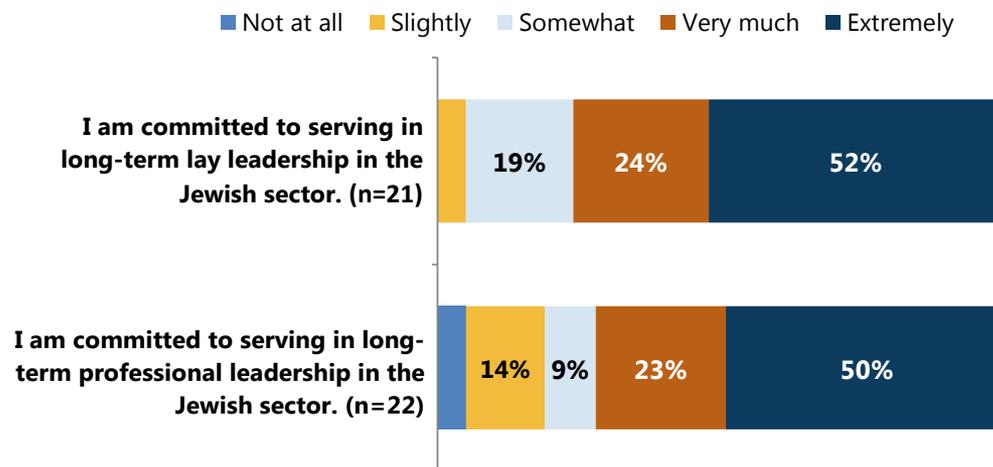
Fellows’ commitment to the Jewish sector was very high before beginning the Fellowship, and Fellows continue to report high levels of commitment after the Fellowship has ended.

About three-quarters of professional and lay fellows report they are very or extremely committed to long-term leadership in the Jewish sector. Knowing that commitment to the sector is presumably a pre-requisite for admission into the Schusterman Fellowship program, one would expect their existing level of commitment to be high. Fellows report that participating in the Fellowship heightens and enhances their commitment to the Jewish sector. Some Fellows report that the relationships they developed and the personal inner journey they began deepened their commitment to serving in the sector as a leader.

“I have been committed since my college years to being a professional leader within the Jewish community. The experience with Fellowship energized me to trust my skills, to push myself to be more confident, and take on even greater challenges that result in enhancing Jewish pride and acceptance among Jews and the wider community.

- Fellow

Professional and Lay Fellows are Highly Committed to Serving in the Jewish Sector



Shifts in Leadership

The largest leadership shifts noted on the post-Fellowship survey included greater clarity of focus on the change Fellows want to create and using one's voice to mobilize others. Fellows and their supervisors reported positive changes on every dimension of the Leadership Practices Inventory,[®] and shared the following shifts observed in Fellows' leadership:

Vision and Thought Leadership

Almost all Fellows and supervisors reported that Fellows now think bigger picture about their organization and its challenges. Some Fellows framed this shift in terms of gaining a wider perspective and being more strategic in their decisions. Other Fellows described the change as an ability to be more proactive and less reactive.

Confidence

Many Fellows and their supervisors reported an increase in confidence and empowerment. One supervisor explained that the Fellow's increased confidence in their own leadership inspired others, enabling the Fellow to be seen as a leader with greater frequency, and allowing others to have a higher level of trust that the Fellow is playing a leadership role.

Management

Many Fellows reported an important shift in how they relate to, manage, and develop the skills of their staff since participating in the Fellowship. Two Fellows have moved from a hierarchical style to a shared leadership style that involves more trust and delegation of tasks. These Fellows have become less directive and are now empowering others to act.

Vulnerability

Some Fellows spoke of an increased awareness of and comfort with their own vulnerability. Increased awareness of and comfort with their weaknesses led to greater openness to seeking out resources to better support their work. This shift was unanticipated by these Fellows, who report they did not appreciate how valuable it is to be comfortable with vulnerability before the Fellowship.

Risk-Taking

Some Fellows reported that they felt more comfortable taking risks after participating in the Fellowship program. Fellows have learned to see risks as opportunities, rather than something to be avoided entirely.

Communication Skills

Some Fellows described work with their coaches that led to positive changes in how they are able to communicate with colleagues and external stakeholders.

Evaluation of Fellowship Components

Overall Fellow Satisfaction

The Schusterman Fellowship received high marks for satisfaction from all Fellows.

100%

of Fellows were **extremely satisfied** (64%) or **very satisfied** (36%) with the Fellowship.

of Fellows were **extremely likely** (85%) or **very likely** (15%) to **recommend** it to a friend or colleague.

of Fellows thought participating in the Fellowship was extremely (86%) or very much (14%) **worth their time and effort**.

90%

of Fellows said the Fellowship **exceeded** (71%) or **met all** (19%) their **expectations**.



Fellowship Component	Feedback	Suggestions
Personalized Leadership Assessment	<ul style="list-style-type: none"> Fellows consider the 360-degree assessment of their leadership a valuable contribution to their learning. 	<ul style="list-style-type: none"> More explicitly link the assessment to the other components of the Fellowship.
Customized Leadership Development Plan	<ul style="list-style-type: none"> Fellows reported highly positive experiences with the opportunities they pursued with their CLDP funds. 	<ul style="list-style-type: none"> Provide more guidance on how to use the CLDP to address specific goals, and how to utilize coaching and the 360-degree assessment to plan for the CLDP.
Individual Leadership Coaching	<ul style="list-style-type: none"> Coaching enhanced Fellows' management and communication; offered valuable alternative perspectives; and provided useful professional and personal learning. 	<ul style="list-style-type: none"> Provide greater alignment between the CLDP and coaching. Ensure that coaches have familiarity with the cultural context of Fellows they are coaching.
Jewish Components of the Fellowship	<ul style="list-style-type: none"> Fellow experiences with the Jewish components of the Fellowship varied more widely than any other component, based on prior knowledge, experience, and interest. 	<ul style="list-style-type: none"> Engage in deeper examination of the issues facing the global Jewish community. Consider the varying ways to identify with Judaism – religiously, culturally, and as country of origin.
In-person Gatherings	<ul style="list-style-type: none"> Fellows highly valued in-person gatherings to learn, grow their skills, connect with one another, and seek and provide support. 	<ul style="list-style-type: none"> Examine the American cultural lens through which programming is filtered.
Network of Fellows	<ul style="list-style-type: none"> Fellows appreciate the diversity of the cohort, value the relationships they built, and rely on the network for support, inspiration, and resources. 	<ul style="list-style-type: none"> Include the perspective of Jews of color and program content related to race, class, background, and privilege.
Alumni Network & Beyond	<ul style="list-style-type: none"> Fellows are unequivocally interested in participating in the alumni network. 	<ul style="list-style-type: none"> Provide formal coordination to ensure the endurance of the alumni network. Support Fellows to share their learning with their staff to broaden the impact of the Fellowship.
Organizational Change Initiative	<ul style="list-style-type: none"> The OCI boosted Fellows' confidence in their developing skills. 	<ul style="list-style-type: none"> Integrate the OCI more explicitly with other components of the Fellowship. Consider the framing and expectations of the OCI for Fellows and their organizations.

Recommendations



Recommendations for Program Implementation

- 1 More intentionally link the individualized components of the Fellowship**
Consider **articulating and codifying some concrete ways** in which the personalized leadership assessment, the CLDP, the OCI, and individual coaching are linked and how they should build upon or reinforce each other.
- 2 Create more connections between the Fellow's job and the Fellowship experience**
To foster greater collaboration within and among Fellows' organizations, consider **creating and managing a network of supervisors; increase communication with supervisors** to ensure clarity on expectations; and **encourage Fellows to replicate Fellowship trainings/experiences in their home offices.**
- 3 Build and manage a robust alumni network/experience for Fellows**
Actively build and manage the alumni network by **providing more facilitated networking opportunities** to foster collaboration and future professional opportunities, as well as providing **more information about how to use the Schusterman Fellow network to look for jobs.**
- 4 Continue to curate the cohort for diversity on many dimensions**
Fellows appreciated diversity in: **Geography** (both international and US based Fellows); **race and ethnicity**; and **professional background and job function.** However, consider greater uniformity (rather than diversity) on seniority or level of leadership experience.
- 5 Reflect on differences in Fellows' backgrounds and consider adjustments to the curriculum to deepen the impact of the Fellowship for all Fellows.**
Fellow satisfaction with the Fellowship was influenced by: their **experiences being Jewish** (religiously, nationally or culturally); **geographic location** (much of the Fellowship is delivered through an American cultural lens); and **level of seniority.** More intentionally considering programming, and perhaps revising the curriculum to be more applicable to a broader range of perspectives, will help deepen the impact of the Fellowship for Fellows.

Recommendations for Evaluation

While there are some early promising results, it is too soon to fully assess impact on the Jewish sector three months after the conclusion of the first cohort. As the Fellowship progresses, future evaluation efforts should focus on the impact of the Fellowship on the Jewish sector.

Explore sector-level outcomes of the Fellowship

The following outcomes have been identified as changes Schusterman expects to see 18 months after Fellowship completion. Future evaluations should explore these outcomes and related changes in Fellows and the Jewish Sector.

- Fellows serve as “ambassadors” for the Fellowship as a Jewish leadership pipeline
- Schusterman Fellows fill Jewish sector positions of influence
- Fellows provide mentorship to emerging leaders in the sector
- Schusterman Fellows remain in positions in the Jewish sector (leadership sustainability)
- Schusterman Fellows provide an ongoing succession pipeline for the sector and assume positions of influence in perpetuity
- Priority organization hiring managers and Schusterman CareerHub professionals have an easier time recruiting talent for senior roles
- Organizations led by Schusterman Fellows are better able to attract and retain high-quality talent at all levels

Conduct a Network Analysis to determine Fellowship network viability and reach

Once several cohorts have completed the Fellowship, conduct a network analysis to determine:

- The extent to which Fellows are continuing to connect with and support one another across the sector, and
- The extent to which the Schusterman Fellow network has broad connections throughout the Jewish sector.