

The Schusterman Family Foundation

Schusterman Fellowship Evaluation: Cohort 2 Executive Summary

June 2018

Prepared by:



LEARNING *for* ACTION

Evaluation Purpose & Methods

The Schusterman Foundation (CLSFF) engaged LFA in 2016 to understand the impact of the Fellowship's first cohort of Fellows. In 2017, CLSFF partnered with LFA again to evaluate the experience of Cohort 2 Fellows. This evaluation report is based on data collected from Cohort 2 Fellows between November 2017 and February 2018, and also includes a comparison of outcomes from the Cohort 1 evaluation. Lessons learned from the evaluation of the first two cohorts will inform programmatic and strategic decisions for future cohorts and the Foundation's leadership development strategy. Future evaluations will include the experiences and outcomes of additional cohorts of Fellows and longer-term outcomes for Senior Fellows.

Research Questions

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

Methods

An In-Depth Review of Existing Fellowship Data

LFA reviewed Fellowship materials, including Cohort 2 Leadership Practice Inventory scores (see slide 14), to inform the evaluation.

Survey of Fellows

Twenty-nine Fellows from Cohort 2 completed an online survey in November 2017, approximately 2 months after the end of Fellowship programming. The survey had a 100% response rate. Demographic data for Cohort 2 (n=29) is shown below.

Interviews With Fellows and Their Supervisors

LFA conducted one-on-one phone interviews with a group of Cohort 2 Fellows (n=17) and their Supervisors (n=12) in early 2018. LFA compiled and analyzed notes from each interview.

Demographic Composition of Cohort 2



Evaluation of Fellowship Impact

Career Advancement

The Fellowship is supporting career and leadership advancement for Cohort 2 Fellows.

36%

of Cohort 2 professional Fellows started new jobs in Senior Executive roles. Seven of these Fellows moved to a new organization for this role and two Fellows were promoted within their organization to the roles.

12%

of Cohort 2 professional Fellows received promotions to new roles not at the Senior Executive level.

17%

of Cohort 2 Fellows assumed a senior board leadership role at an organization in the Jewish Sector

Sector Impact

43%

of professional Fellows from Cohorts 1 and 2 have advanced to Senior Executive positions since beginning the Fellowship (n=44).

Six Fellows from Cohort 1 reported moving to new organizations within the first year after the Fellowship. Most of this movement was within Jewish communal organizations. One Fellow moved into the Jewish sector from the secular nonprofit sector.

New Opportunities

The Fellowship is supporting new opportunities for Cohort 2 Fellows.

Fellows Report New Opportunities Since Beginning the Fellowship



(n=25)

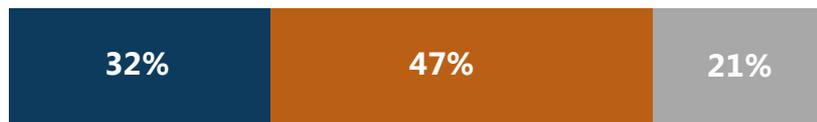
Increase in Existing Role Responsibilities

Schusterman Fellows widely report an increase in responsibilities since the Fellowship.

72% of Cohort 2 Fellows who did not receive a formal promotion report an increase in their responsibilities (n=29)

A Majority of Fellows Report an Increase in Professional Responsibilities (n=19)*

■ Yes, a great deal ■ Yes, a little bit ■ No, not at all



*This question was asked of Fellows who had not started a new job (accepted a position with a different organization) since starting the fellowship

The Fellowship supports career and leadership advancement

In surveys and interviews Fellows credit the Fellowship with supporting and enhancing their growth and development as individuals and as leaders. Fellows' supervisors foresee continued growth for Fellows, envisioning that those who are currently in Senior Executive roles will move to larger organizations, and those who are in middle management positions will move into Senior Executive positions.

Commitment to Leadership in the Jewish Sector

Schusterman Fellows report high levels of commitment to long-term leadership in the Jewish sector.

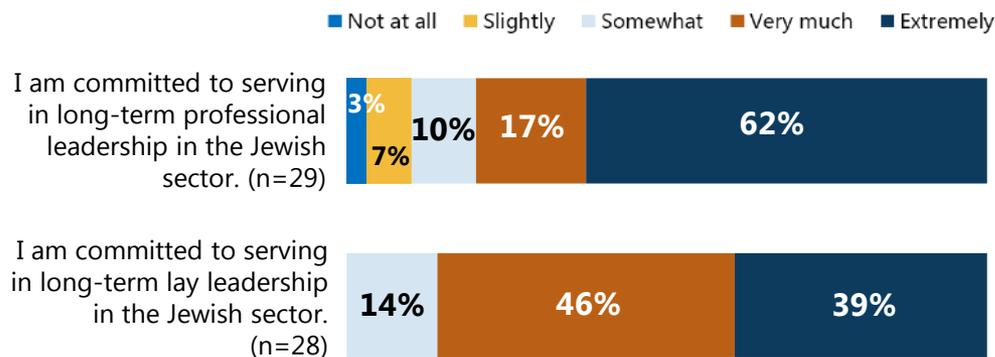
The majority of Cohort 2 Fellows report that they are **very or extremely committed to long-term professional (79%) or lay (85%) leadership in the Jewish sector**. Some Fellows, including those who have had extensive education or training in the sector, indicated a high level of commitment prior to the start of the Fellowship; however, a number of Fellows reported a dramatic shift in their commitment to the sector, including: professional Fellows who are now seeking lay leadership opportunities, and lay Fellows who are now considering transitioning into professional roles in the sector.

Notably, while 96% of Fellows report a strong commitment to their current organizations, only 34% report opportunity to advance in their current organizations, suggesting that **Fellows may need to change organizations to continue their professional trajectories**. Finally, Fellows report a strong commitment to “pay forward” the benefits they have received through the Fellowship experience.

I am giving the Schusterman Foundation a lifelong IOU. ... I take all of this very seriously. I firmly believe that I am delivering on that and will continue to do so.

- Fellow

Fellows are Highly Committed to Serving in the Jewish Sector Long-Term



The sum of the percentages may be more or less than 100% due to rounding

Shifts in Leadership

The most significant shifts in leadership reported by Cohort 2 Fellows on the post-Fellowship survey included **greater confidence in their leadership abilities and a stronger understanding of their own weaknesses.**

Strategic Vision

- Enhanced capacity for developing, implementing and communicating strategic vision.
- Increased ability to engage in: thoughtful reflection; more effective change management and organizational scaling; and collaboration with key organizational stakeholders.

Management

- Better equipped to prioritize, manage themselves and others, and delegate.
- Gained concrete tools and strategies, including tools for facilitation, SWOT analyses, and effective employment practices.

Finding their Voice

- Increased their ability to articulate their own unique perspectives.
- Engaged in a new level of thought leadership and decision-making, experienced more effective communication and collaboration, and were better able to share their vision with the sector more broadly.

Leadership Presence

- Greater sense of their own leadership presence, greater sense of calm, reduced sense of urgency.
- Enhanced ability to show up authentically in their work, and deepened skills to manage their own emotions, body language, and stress.

Risk-taking

- More comfortable taking risks and trying new approaches.
- Better equipped to navigate feelings of fear and discomfort effectively.

Confidence

- Increased confidence as a leader.
- Supported and encouraged to take their work and leadership to the next level.

Top Five Positive Shifts in Leadership

(n=29)

I am more confident in my leadership abilities.	90%
I have a stronger understanding of my own weaknesses.	86%
I am more clearly focused on the change I want to create.	79%
I am more able to use my voice to share my vision to mobilize and inspire others.	79%
I feel more fulfilled physically, mentally, emotionally, and spiritually.	72%

Benchmarking Fellowship Impact and Practices

The Schusterman Fellowship is well aligned with top leadership development programs.

- A 2018 study¹ from Fund the People revealed **four key results of talent investing**: bringing skills Fellows gained back to their organizations; cultivating a strong network of leaders; creating a shared vision of strong leadership; and developing strong relationships with organizations in the sector. **Schusterman is well aligned with these findings**: the Fellowship is designed to build both shared vision and a strong network of leaders, and aims to build talent and relationships with organizations across the sector.
- In 2017, LFA found that the Schusterman Fellowship **builds similar skills, knowledge, and practices** for its Fellows as professionals who participate in **Rockwood Leadership Institute** programs.
- A 2016 report² from Auburn Seminary and American Jewish World Service, with support from the Wexner Graduate Fellowship, describes **best practices for measuring the secondary impact of leadership investments** including: approaching evaluation with an eye toward adaptation and emergent evidence; development of a clearly articulated logic model; use of a range of data collection tools and methodologies; and intentionally using data to inform ongoing program improvement. The **Schusterman Fellowship engages in all of these best practices** as it seeks to understand the impact of the Fellowship on Fellows, organizations, and the sector more broadly.

Opportunities for Schusterman to deepen its impact measurement

- Continue to **investigate more deeply the impact** of the Fellowship **on organizations, collaboration, and the sector**.
- Consider using **alternative tools for measuring impact**, such as those identified in the Auburn/American Jewish World Service report.
- Continue to **engage with other talent investors** to build clear outcomes to serve as benchmarks for Fellowship programs.
- Consider conducting **qualitative case studies** to more deeply explore the Fellowship's impact on Fellows and their organizations.

¹For more information: <http://fundthepeople.org/4-key-results-of-talent-investing/>

²For more information: <http://auburnseminary.org/report/secondaryimpact/>

Evaluation of Fellowship Components

Fellow Satisfaction

The Schusterman Fellowship received high marks for satisfaction from most Cohort 2 Fellows.

94% of Fellows were **extremely satisfied** (59%) or **very satisfied** (35%) with the Fellowship.

96% of Fellows were **extremely likely** (86%) or **very likely** (10%) to **recommend** the Fellowship to a friend or colleague.

97% of Fellows thought participating in the Fellowship was **extremely** (83%) or **very much** (14%) **worth their time and effort**.

83% of Fellows said the Fellowship **exceeded** (62%) or **met all** (21%) of their **expectations**.

While satisfaction of Cohort 2 Fellows was very high, it is important to note that not all Fellows reported universal satisfaction with the Fellowship, giving us confidence in the honesty of Fellows when completing the survey. Please see slide 14 for a comparison of Fellow satisfaction by Cohort.

That is a theme that resonated throughout. It was so welcoming. **It was about being members of this one team that is really interested in helping each other develop** personally and professionally. We fostered meaningful relationships and collaboration and opportunities in a way that is defining. I am proud to say I am a Fellow. **That is a currency over time that is going to be valuable in many ways** and will help me to give back.

- Fellow

Evaluation of Fellowship Components

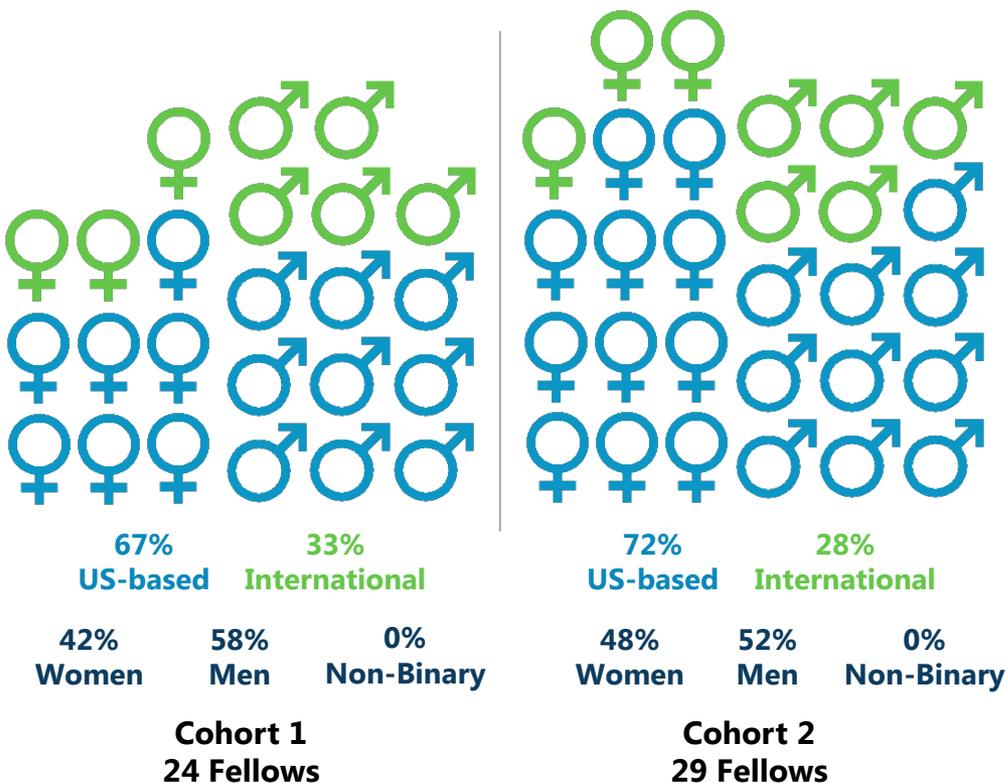
Fellowship Component	Impact on Fellows	Fellows' Suggestions to Enhance Fellowship Component (*denotes a program change already in progress)
Customized Leadership Development Plan	The CLDP contributed substantially to Fellows' growth. The flexibility to choose from a diverse array of opportunities tailored to the individual is crucial for creating impactful CLDP experiences.	<ul style="list-style-type: none"> • Allow more time to complete the CLDP.* • Clarify the framing and parameters of the CLDP.* • Link the CLDP more explicitly to coaching.* • Provide more information on others' CLDP experiences.*
Individual Leadership Coaching	Coaches pushed Fellows to be accountable to their goals, encouraged Fellows to try new approaches and take risks, and provided crucial support and thought partnership for Fellows.	<ul style="list-style-type: none"> • Provide greater alignment between coaching and the other elements of the program, particularly the CLDP.* • Provide more time to develop the coaching relationship to better support CLDP development.*
In-person Gatherings	Fellows highly valued in-person gatherings to learn, enhance their skills, build relationships, seek and provide support, and replenish themselves.	<ul style="list-style-type: none"> • Provide more time for informal connection.* • Include more diverse presenters.* • Consider creating subgroups based on interest or experience.
Jewish Components of the Fellowship	Fellows' 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"> • Integrate Jewish elements more fully into overall Fellowship. • Provide more Jewish coaching experiences.* • Broaden content to address the range of Jewish identities.* • Clarify CLSFF's definition of good Jewish leadership.
Diversity and Inclusion of the Fellowship	Fellows report the network to be relatively diverse in terms of age, gender, sexual orientation, location, and to some extent, the type of organization they serve within the Jewish sector.	<ul style="list-style-type: none"> • Cultivate greater diversity among Fellows including: race/ethnicity, gender identity, language, religious observance, political views, and perspectives on the Israel/Palestine conflict.* • Clarify CLSFF's definition of diversity, and incorporate DEI into all aspects of the program, including content and presenters.
Network of Fellows & Senior Fellows	Fellows rely on one another for resource sharing, thought partnership, support, and empowerment. Fellows are eager to stay connected to the Fellowship network.	<ul style="list-style-type: none"> • Provide greater clarity about the purpose, goals, structure, and content of the Senior Fellow experience. • Provide opportunities for ongoing collaboration.* • Provide greater clarity when bringing cohorts together.
Organizational Change Initiative	While Fellows' experiences with the OCI varied, for some Fellows the OCI was transformative for their organizations, and generated enthusiasm and new insight or vision.	<ul style="list-style-type: none"> • Clarify the purpose and parameters of the OCI.* • Provide support and structure to encourage greater buy-in and involvement of organizations in the OCI. • Provide an alternative way for Fellows to put Fellowship learning into practice.*

Comparisons by Cohort, Gender, and Geographic Location

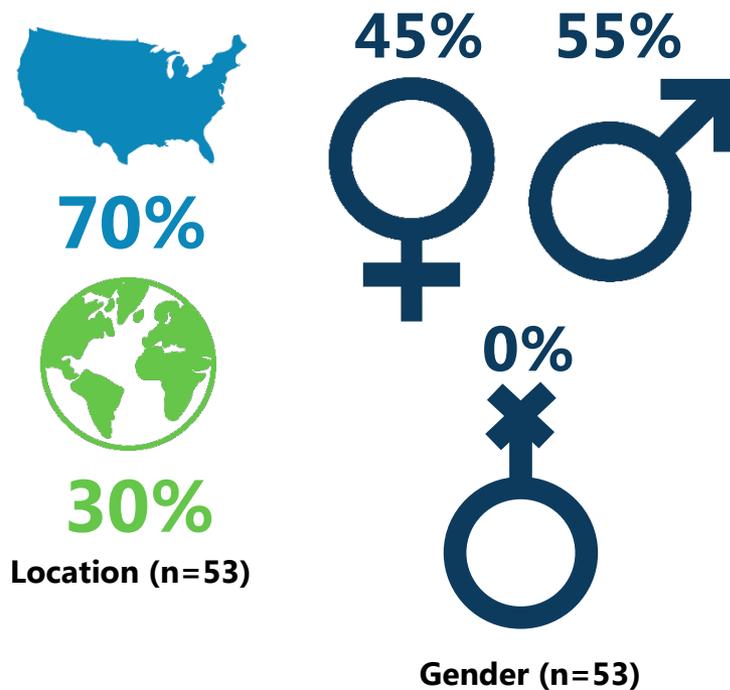
Introduction

In addition to the overall experiences of Fellows in Cohorts 1 and 2, the Schusterman Foundation has been interested in exploring the similarities and differences between subgroups of Fellows and comparison of the experiences of Fellows in Cohort 1 versus Cohort 2. The slides that follow highlight the similarities and differences between the experiences and outcomes of Fellows in Cohorts 1 and 2, and similarities and differences reported by subgroups of each cohort by gender and geographic location.

Cohort 1 & 2 Distributions



Combined Cohort 1 & 2 Sub-Group Distributions



Comparison of Outcomes and Satisfaction: Cohort

While Fellows' experiences with the Fellowship were overwhelmingly positive, there were some notable differences between Fellows in Cohort 1 and Cohort 2.

Satisfaction with the Fellowship

- **Cohort 1 Fellows reported higher ratings** than Cohort 2 on the following aspects of the Fellowship: **satisfaction** with the Fellowship, **likelihood to recommend** the Fellowship to a colleague, **and extent to which the Fellowship was worth their time and effort**. Notably, 100% of Cohort 1 Fellows rated each of these dimensions of the Fellowship highly, in comparison to 94-97% of Cohort 2 Fellows.¹
- Additionally, **90% of Cohort 1 Fellows** reported that the **Fellowship met or exceeded their expectations**, in comparison to **83% of Cohort 2 Fellows**. It is possible that Cohort 2 responses differ due to higher levels of seniority, previous participation in other Fellowship experiences, and experience as trainers themselves. However, it is important to note that while the percentage of Fellows who reported high ratings on these dimensions varied between cohorts 1 and 2, the difference in average ratings on these dimensions was not statistically significant.

Impact of the Fellowship

Comparison of Cohort 1 and 2 post-Fellowship survey data reveal differences in outcomes between Cohorts 1 and 2 in the following areas:

- **Cohort 1 Fellows rated their Fellowship experience on the following dimensions significantly higher** than their Cohort 2 peers:
 - Ability to express their unique Jewish leadership
 - The extent to which their OCI enabled them to use their newly developed leadership skills
 - The extent to which their OCI built their confidence in using their newly developed leadership skills
 - The extent to which they utilized the network to connect to others in the Jewish sector (outside of the Fellowship network).
- **Cohort 2 Fellows rated the extent to which they utilized the network** to look for a new lay leadership position in the Jewish sector **significantly higher** than Cohort 1 Fellows.

¹For more information see slide 10

Comparison of Outcomes and Satisfaction: Gender and Geographic Location

Schusterman Fellows are diverse on a number of dimensions, including gender and geographic location. The following significant differences were found among these groups for Cohorts 1 and 2.

Cohort 1 Differences by Subgroup

- **Women** rated the following significantly higher than men:
 - Commitment to continuing in a leadership role (lay or professional) in their current organization in the Jewish sector
- **Men** rated the following significantly higher than women:
 - The extent to which they are more able to see their work through a Jewish lens
 - Working more in partnership, empowering others to create change.
 - All aspects of the OCI, including enabling them to use and building confidence in their newly developed leadership skills, and contributing to increases in their organization's openness to positive change
 - Learning from peers in the network
- **International Fellows** indicated that they are more able to identify innovative approaches to solving problems than US Fellows.

Cohort 2 Differences by Subgroup

- **Women** rated the following significantly higher than men:
 - The extent to which the Fellowship met their expectations
 - They are more able to use their voice to share their vision to mobilize and inspire others
- **Men** rated the following significantly higher than women:
 - Commitment to serving in long-term professional leadership in the Jewish sector
 - The budget of \$15,000 for personalized professional development was the right amount for achieving the goals specified in their CLDP
- **US Fellows** indicated that they utilized the Fellowship network to access information and resources significantly more so than international Fellows.

Recommendations

Recommendations for Future Implementation

1

Engage diverse Fellows from the global Jewish community throughout all aspects of the Fellowship.

Consider the multiple domains of diversity among Fellows, including gender, gender identity, race, ethnicity, geographical location, level of seniority, Jewish identity), political views, religious observance, and other aspects of diversity.* Incorporate issues of diversity, equity, and inclusion throughout program content and selection of speakers.* Encourage an atmosphere that allows expression of diverse or minority-held opinions.

2

Tailor the Jewish elements of the Fellowship for a broad range of Fellows.

Consider ways to more fully engage those who are more religiously observant as well as various options for Jewish programming for those with different levels of knowledge or awareness and Israeli Fellows.* More intentionally integrate Jewish concepts into the other components of the Fellowship to enhance cohesion of the Fellowship. This will also serve to brand the Fellowship as a Jewish leadership program, rather than a leadership program with Jewish elements.

3

Intentionally engage Fellows' organizations.

Encourage Fellows to share their experiences, growth, accomplishments, and learning with their organizations and its stakeholders. Provide greater clarity to supervisors regarding expectations of their involvement with the Fellowship and ways they can support Fellows both during and after the Fellowship.

4

Create opportunities for Fellows to leverage the network

Provide more opportunities for Fellows to connect informally at gatherings.* Clarify the purpose of combined cohort gatherings, and provide sufficient time for current Fellows to transition to engagement with Senior Fellows at the final gathering. Intentionally engage Senior Fellows to support a strong Fellowship network and provide ongoing opportunities for Senior Fellows to collaborate,* share resources with each other, grow their leadership skills, and connect to new career and lay leadership opportunities.*

5

Clarify the purpose and links among components.

Clearly articulate the purpose, goals, and expectations of each component of the Fellowship, and how the components are intended to be integrated in service of the overall goals of the overall Fellowship experience.* Clearly define the Foundation's concept of strong Jewish leadership, and explicitly integrate these elements throughout all aspects of the Fellowship.

Recommendations for Future Evaluation

1

Continue to conduct a third party evaluation of each cohort

Conduct an evaluation of each cohort, including pre- and post- program data collection. This work will inform ongoing program evolution and provide information on the short-term outcomes of the Fellowship.*

2

Conduct a longitudinal evaluation to explore longer-term Fellowship outcomes

The longitudinal evaluation was launched in 2018 and will collect data from Senior Fellows one, three, and five years after the completion of their Fellowship experience.* Data from this evaluation may also inform programming for future Fellowship cohorts and Senior Fellow programming.

3

Conduct qualitative case studies to explore the Fellowship's impact on Fellows and their organizations

LFA recommends selecting a subset of Fellows and organizations for qualitative case studies. The case studies would explore the impacts of the Fellowship on Fellows and Fellow's organizations. Organization case studies would seek to understand if there is a difference in the magnitude of change for organizations that have had more than one staff member participate in the Fellowship.*

4

Continue to collect Fellowship network data

Once several cohorts have completed the Fellowship, the Schusterman Foundation may want to explore network analysis to determine:

- The extent to which Fellows within and across cohorts are continuing to connect with and support one another,
- The extent to which the network is supporting cross-sector collaboration, and
- The extent to which the network is bridging to other organizations and leaders throughout the Jewish sector.

5

Continue to seek Fellowship benchmark data

As a leader in the field of leadership development programs, the Schusterman Foundation is well-situated to engage with other talent investors to develop benchmarks to support assessment and ongoing development of Fellowship programs.*