

# The Kaplan Leadership Initiative Evaluation Report First Cohort 2018–2019

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# Abstract

## Background

The Kaplan Leadership Initiative (KLI) is the first international JDC program that has set itself the goal of developing young leadership in Jewish communities in Europe, the former Soviet Union (FSU) and Latin America. The program is designed for young professionals at mid-level positions in Jewish communities, aspiring to strengthen their influence and leadership, particularly in their organizations and communities. It focuses on providing tools and knowledge in four areas: leadership, management, community development, and Jewish content. The plan is for 3 program cohorts, each built on 3 regional seminars, and 1 global seminar hosted in Chicago by the Spertus Institute for Jewish Learning and Leadership, as well as activities and tasks in between the seminars. This report presents the main findings on the first cohort of the program (2017-2018), which numbered 32 fellows from two regions – Europe and the FSU.

## Evaluation goals

The evaluation aims to examine the implementation and organization of the program, and the extent to which it achieves its main objectives. At this stage, the evaluation examines the achievement of the program's intermediate goals, such as the acquisition of new knowledge and tools for management and leadership, the development of connections and networking, and preliminary evidence that the program has attained its ultimate goals in the fellows' communities: their own changing roles in the organization, their adoption of tools in their professional activities, and contact and networking with program fellows.

This is a formative evaluation that seeks to improve the various program components while evaluating it through close teamwork with the staff. The purpose of the report is to summarize the findings on the first cohort in order to improve the program for the coming ones.

## Methods

The evaluation is based on an examination of the program as a whole. To this end, the research tools are nearly identical for all of the regions yet sensitive to the distinctive characteristics of each. Each evaluation cycle covers 3 main stages (before, during and after the program). It combines quantitative

tools (self-administered questionnaires), semi-structured interviews with fellows and program staff, as well as observations at regional seminars and the global seminar. A special effort was made to maintain sensitivity to unique cultural and linguistic aspects in the development of the tools while collecting the data.

## **Key findings**

All the fellows expressed great satisfaction with the program's implementation and organization for the regional seminars and especially for the global seminar; 91% of the FSU participants and 81% of the European fellows reported that the program had met all or most of their expectations in a number of key areas: communication and networking, the acquisition of new knowledge and tools, and professional and personal development. Regarding the program's contribution, FSU fellows cited leadership and management skills, while the European fellows cited stronger motivation and the development of their professional identity as community workers.

The establishment of new connections and / or strengthening of ties with colleagues in the region were cited by 75% of the European fellows and 46% of the FSU fellows. All of the fellows reported that they had begun to apply the knowledge and tools learned in the program. European fellows credited the mentoring work for their ability to apply the new knowledge and tools in the work.

## **Issues to consider regarding future implementation**

Several recommendations emanated from the report: To adhere to the program's admission criteria; insist on English proficiency or its acquisition during the program; place greater emphasis on fundraising, teambuilding, integrated Jewish learning, and community development; invest more in creating a global network; enable more peer learning; connect organizational managers and mentors to the program; invest greater efforts in cultural adaptation; make mentoring mandatory while creating a culturally comfortable climate for FSU fellows; upgrade the work in between seminars; and introduce structural improvements in the program's organization.

# Executive Summary

## Background

The Kaplan Leadership Initiative (KLI) is the first JDC global program to provide the necessary tools and support to develop young leaders from Jewish communities in Europe, the former Soviet Union (FSU) and Latin America. It is funded by Ed and Carol Kaplan, USA.

KLI Fellows are mid-level, Jewish professionals aspiring to increase their impact on their organizations and communities through better management and leadership skills in the context of Jewish life. The program focuses on four areas: community development, leadership, Jewish content and context, and management. These are adapted to local characteristics, needs and culture.

The program plan is for 3 cohorts: 2017-19, 2019-2020, and 2021-22. Each cohort has regional programs, including 3 regional seminars and 1 global seminar at the Spertus Institute for Jewish Learning and Leadership in Chicago, USA. In between the seminars, learning activities are offered.

This report elaborates the findings on the first cohort, i.e., 2017-2019, numbering 32 fellows from two regions: Europe and the FSU.

## Evaluation framework

### Evaluation goals

The evaluation focuses on examining KLI's program implementation and contribution, as well as the more direct, intermediate outcomes at the end of the first cohort:

- Examine the implementation of the program
- Examine the degree to which the program is achieving its outcomes as outlined in its theory of change
- Contribute to ongoing improvement as the program develops

At all stages of the program, the evaluation aims to examine its contribution based on the list of intermediate and final outcomes defined in the logic model.

## Research methodology

A mixed methods approach was used to obtain both quantitative and qualitative input in depth. Quantitative analysis provides comparative and crosscutting information. Qualitative analysis enables better interpretation of the findings, based on a greater understanding of the context and concrete, in-depth examples. Careful attention was and is given to cultural and linguistic factors in the development of research instruments and the interpretation of the findings.

Our data collection for the first cohort of European and FSU fellows (16 participants per region) used a number of instruments: online self-report surveys (in two languages) before the program started and at the end; in-depth, qualitative interviews midway through the program and at the end; interviews with participants at the global seminar; on-site observations (at regional and global activities); and the analysis of documents produced by the program.

Table ES1 presents the summary of the tools, sources of information and number of respondents per method.

**Table ES1: Study design summary – Data collection methods and sources of information**

<b>Data Collection Method</b>	<b>Source of Information</b>	<b>No. of Respondents</b>
Pre-program online self-administered questionnaire (before the first seminar)	Program participants	32
Mid-program semi-structured telephone interviews (FSU only)	Program participants	5
Observation at the regional seminar in Israel	One day for each region	
Observation at the global seminar	4 days	
Informal interviews at the global seminar	Program participants	14
Post-program online self-administered questionnaire (a week after the final regional seminar)	Program participants	29
End-of-program semi-structured telephone interviews	Program participants	9

## Study findings

### **Background characteristics of program fellows**

Both groups met the criteria for age and occupation. The European group lacked the required professional seniority, the FSU group had a low level of English. Europeans tend to have a richer background in Judaism from childhood although the fellows' participation in Jewish-related activities and Israeli-connected programs in the two years preceding the program was similar for both regions. The fellows hailed from communities of very different sizes, with a wider range in Europe than the FSU.

### **Attendance and satisfaction with the program: seminars and in-between activities (absolute numbers are given next to the percentages, in brackets)**

Most of the fellows attended the regional seminars and 69% (22) attended the global seminar. There were 6 dropouts from the program, 3 from each region. All the European fellows participated in mentoring and havruta (paired) learning in between the seminars; 38% (5) of the FSU fellows chose to work with a mentor; there was no 'havruta' learning in the region. FSU fellows completed home assignments to practice the tools learned in the seminars, but European fellows were not given assignments. Both groups attended some of the webinars, but the use of webinars fell short of their potential benefits.

### **Program contribution**

We examined several aspects of the program's contribution: the acquisition of knowledge and tools; the participants' perceptions and motivation to pursue a career in the Jewish community; networking, and the application of the new knowledge and tools. European fellows emphasized the program's contribution to the integration of Jewish content in their daily work (81%, 13), and felt that their needs in the area of management had not been met; only 37% (6) felt that they had broadened their knowledge of management. FSU fellows emphasized the program's impact on their leadership and management, knowledge and skills (77%, 10). Approximately two thirds of the fellows felt that the program had contributed to their knowledge on leadership; 62% (10) of the European and 46% (6) of the FSU fellows reported broadened knowledge of community development.

The program's greatest contribution was in helping the fellows to understand their strengths and challenges as Jewish professionals, and to think about the next steps on their professional path. There was an increase of about 20 percentage points in their self-perceptions as Jewish professionals compared



with the start of the program: 81% (13) of the European and 100% (13) of the FSU fellows now saw themselves as Jewish professionals; 94% (15) of the European and 92% (11) of the FSU fellows now felt a sense of belonging to the community of Jewish professionals.

The regional networks were well formed, but the global network did not develop according to expectations. This was due to cultural and language communication gaps, as well as a lack of opportunity at the global seminar and in between seminars.

While it is too early to examine the program's impact on their work in the field, the fellows attest to changes in their self-perception and work methods following their program participation; e.g., developing new programs, incorporating measurement and evaluation, and conducting fundraising.

### **Program organization**

The European fellows were mostly satisfied with the time allocated to the four content areas, FSU fellows felt that more time had been needed. Both groups were quite satisfied with the amount of Jewish learning provided, and dissatisfied with the amount of time dedicated to the development of professional management skills. The groups varied in their satisfaction with the amount of time dedicated to different learning methods. Fellows from both regions approved of the amount of time devoted to study tours and excursions, and would have liked more workshops.

Regarding satisfaction with the intervals between seminars: 44% (7) of the European and 23% (3) of the FSU fellows felt that there had not been enough activities in between the seminars, and 25% (4) of the European and 15% (2) of the FSU fellows noted that the seminar days had been too long.

Both groups reported high satisfaction with various program aspects, including its organization, guidance, lecturers, program materials, responsiveness and flexibility. Slightly lower levels of satisfaction were reported for group facilitation and the management of facilitation between the seminars.

### **Expectations from the program**

Nearly all of the fellows felt that the program had met all or many of their expectations: 81% (13) of the European and 92% (15) of the FSU fellows. The main expectations realized were the acquisition of tools, skills and knowledge, as well as networking. The Europeans also cited personal and professional growth, and increased Jewish knowledge. The expectations that were not realized were few and scattered over various topics.

## Overall program evaluation

Most of the fellows felt that the program included new themes and relevant topics, and reflected their current professional issues, the FSU fellows significantly more so than their European peers. All the fellows said that they would recommend the program to others, and some already have. All the fellows described the program as a very meaningful experience; indeed, some pronounced it life-changing.

## The fellows' recommendations

The fellows recommended several changes to improve the program:

- The structure should be modified, adding more workshops and teambuilding.
- The content should be improved by adding more academic classes followed by workshops, as well as practical tools using relevant, regional examples.
- The formation of contacts and networking should be enhanced, investing greater effort in creating a global network through joint learning and assignments in between the regional seminars and at the global seminar.
- Some needs relate to the end of the program and afterwards: the fellows need to learn how to introduce new ideas to managers and colleagues, they should have the benefit of ongoing support and the resources to maintain networking.

## Issues for consideration regarding future implementation

Based on the evaluation findings we recommend action in the following areas:

1. **Admission criteria** should be adhered to, to derive the maximum benefit of the program.
2. **English proficiency** is a key factor of networking and learning at Spertus. If fellows are not proficient in English, the program should provide an opportunity to improve their command of the language from the very start.
3. **Content:** More emphasis should be placed on integrated Jewish learning, community development, fundraising and teambuilding.
4. **Networking** would benefit from introducing fellows from different regions earlier in the program, and adding international joint learning or tasks, as well as international webinars.
5. **Peer learning:** There should be more contact, more mutual learning in regional and global groups.

6. **Passing on the learning:** Efforts should be made to connect mentors and managers to the program, and to teach the fellows how to share their experiences and knowledge with colleagues and managers.
7. **Cultural adaptation:** All program staff should familiarize themselves with the characteristics of the different communities and the challenges faced by fellows, especially the speakers at the global seminar.
8. **Mentoring:**
  - Mentoring is the program's game-changing component and should be obligatory.
  - FSU fellows are not familiar with the mentoring method and its presentation must be culturally sensitive.
  - The mentoring process requires greater structure. Mentors need to know more about the program and their mentees, and both mentors and mentees should familiarize themselves with the framework and expectations of the mentoring process.
9. **Work in between seminars** should include the dispatch of pre-seminar reading material, home assignments, and international webinars.
10. **Structural improvement:** There should be more workshops to drill the theoretical material, fewer group discussions, and more time for reflection and closure.

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# Table of Contents

1. Introduction	1
2. Research design	2
2.1 Evaluation goals	2
2.2 Evaluation strategy	2
2.3 Tools and method	3
2.4 Data analysis	5
3. Evaluation findings	6
3.1 Fellows' background characteristics before the program	6
3.2 Attendance and satisfaction with program: Seminars and in between activities	12
3.3 Program contribution	15
3.4 Program organization	23
3.5 Expectations from the program	26
3.6 General assessment of the program	28
3.7 The fellows' recommendations	31
4. Issues for consideration regarding future implementation	33
5. Research limitations	35
Appendixes	36
Appendix I: Background characteristics of fellows by region	36
Appendix II: Jewish communities by size	38

## List of Tables

Table 1: Study design summary – Data-collection method and sources of information	4
Table 2: Self-perceptions of program fellows as Jewish professionals and leaders	8
Table 3: Attendance at seminars	12
Table 4: Program contribution to expanded knowledge in various content areas	16
Table 5: Program contribution to the fellows' development as Jewish professionals	18
Table 6: Fellows' self-perceptions as Jewish professionals	19
Table 7: Program organization	26
Table 8: Expectations from the program	27
Table 9: Expectations not realized	28
Table 10: Overall assessment of the program	28

## List of Figures:

Figure 1: Jewish denomination	9
Figure 2: Experience of judaism in childhood	10
Figure 3: Participation in Jewish and Israel-related activities in the previous two years	11
Figure 4: Mentoring experience	13
Figure 5: Time allotted to the program's four areas of content	23
Figure 6: Time allotted to various learning methods	24
Figure 7: Program intensity	25
Figure 8: Meeting expectations	26